Co-discovery Conferences:

A Users' Manual

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The co-discovery conference: a user's manual

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1. Introduction

Does the whole idea of "market research" or "audience research" seem a little one-sided to you? Does it conjure up a picture of audiences quietly watching TV, while researchers inspect them - in much the same way as rats are studied while finding their way through a maze?

Communication is most effective when it is interactive: when it works in both directions, and it is immediate. It occurred to me that one way to improve the effectiveness of research, to make it into two-way rather than one-way communication, would be to enlarge the concept of consensus groups.[*] Based on search conferences (one of the strands from which consensus groups were derived) I developed a new type of activity, a mixture of research and planning. I call this a co-discovery conference.

The concept is this: staff members and audience members meet for a day, find out more about each other's interests and capabilities, and together map out a future direction for the organization.

After experimenting, I found that the ideal number of participants is 25 to 40, with more audience members than broadcasters: about 20 audience members and 15 staff members. Why more audience than staff? Partly because an organization's audience greatly outnumbers its staff, and partly because the audience participants can feel overwhelmed at the expertise of the staff - so having more audience participants gives them more confidence. With less than about 25 people present, there's not enough variety. But with more than about 40 people, the process takes much longer - a lot of time is spent waiting.

[*] See www.audiencedialogue.org/consensus.html and the *Consensus Group Users' Manual,* in the same format as this volume (Original Books, Wellington, 2005)

2. Principles and origins

The main principle of the co-discovery conference is that, in a suitable social environment, it's possible for two contrasting groups of people to better understand each other by tacit means, without coming to explicit verbal conclusions. Over the last few decades, many researchers have studied the concept of "tacit knowledge". For example, many skills can't be directly taught by verbal means - even as simple a skill as riding a bicycle. Even for skills which can be taught verbally at first (such as playing a musical instrument), develop at more advanced levels through the transmission of tacit knowledge. To put it another way, scientific knowledge is transmitted explicitly, but artistic skill is learned tacitly. The co-discovery conference is an attempt to replace explicit research findings by tacit understanding.

Consider how the normal market research process works:

1. A client with a research question engages a large market research company, and speaks to a senior executive.
2. That executive briefs a junior researcher to develop a questionnaire.
3. The junior researcher, after writing the questionnaire, explains it to a fieldwork supervisor.
4. The fieldwork supervisor explains it to the interviewers.
5. The interviewers contact the respondents, and ask them the questions.
6. The respondents answer the questions according to their understanding.
7. The interviewer records the answers.
8. The completed questionnaires are passed on to the data entry team, who code the questionnaires and enter them into a computer file.
9. A junior researcher (perhaps not the same one who developed the questionnaire) runs the data file through statistical software, produces tables of numbers, and writes a report.
10. The report is passed on to the senior executive.
11. The senior executive discusses the findings with the client.

Every time the problem is passed from one person to another, there is some potential for misunderstanding. To be fair, there is also potential for adding an alternative viewpoint - but in that chain, there is no place for tacit understanding. To avoid any misunderstanding, everything has to be explicit, and written out clearly. Though it's a scientific process, it's a cumbersome one, and subtlety is lost.

However, the solution is not (as some companies believe) simply to send managers out to talk to customers. It's all to easy to get a distorted view this way. Customers, not knowing or trusting the managers, are guarded in their responses, and managers (who usually speak to only a few customers each) can get a very distorted view of what their customers are like. One big advantage of the standard research process is that it is careful to draw a representative sample.

Would it be possible for managers to engage directly with a representative group of customers, in such a way that managers' preconceptions could be swept aside? The co-discovery conference is such an attempt.

The name "co-discovery conference" was inspired by the search conference, developed by Fred Emery and Eric Trist in the mid-1960s, and first applied to the merger of two British aircraft companies with very different corporate cultures. The search conference has become widely used in organization development since the 1980s, and has spawned several other methods, the best known of which is Future Search, developed around the 1980s by Marvin Weisbord and others.

Both the search conference and the Future Search process normally run for two and a half days, alternating between plenary and small group sessions. Search conferences normally have around 25 to 40 participants, while Future Search is designed for 64. The essential difference between the two is that the search conference works with a single population with a common culture, while Future Search is problem-focused rather than culture-focused, and involves a wide range of stakeholders. In both processes, most of the work is done in small groups, which report their findings back to the plenary sessions, in cycles of several hours each.

The central idea of the co-discovery conference is to use the basis of the search conference and Future Search to design a method that is not quite research, not quite planning, but something between the two. Its focus is on how two different groups of people (such as producers and consumers) can begin to better understand each other through tacit knowledge, and begin to work together on an improved way in which the producers can serve the consumers.

In the design of this new process, elements of several other methods were incorporated: Appreciative Inquiry, the consensus group technique, and Open Space Technology. Appreciative Inquiry, often used when a culture is on the point of change, attempts to identify the best features from the past of a social group, and to encourage their continuation through the period of change. In the co-discovery conference, the value of Appreciative Inquiry is the constructive attitude that it fosters among participants.

The consensus group technique is a small-group research method, designed to be used in place of focus groups by those without the training and experience necessary for successful use of focus groups. It has some similarities to the nominal group technique, but differs from both the focus group and NGT in that the participants (rather than the moderator) have the major influence in framing the outcomes of the discussion, and in negotiating a consensus. The contribution of the consensus group concept to the co-discovery conference is that the small-group breakout sessions can be almost self-directed. The contribution of the Harrison Owen's Open Space Technology lies in its time-efficiency in focusing interests where they can be of most use; for example, the "law of two feet" which states that if participants feel they are not contributing to a small-group session, they should join another one.

A vital part of the co-discovery approach is the creation of an empowering environment. This depends on assembling the right numbers and kinds of people in the right kind of setting. If any one of these ingredients is wrong, the necessary mood of co-operation usually fails to develop.

3. When to hold a co-discovery conference

Co-discovery conferences produce a lot of ideas, and any media organization needs an endless supply of these. Therefore, occasional co-discovery conferences are useful for media producers. For other organizations, the best time for a co-discovery conference is when major change is about to occur, and you realize you don't know enough about your audience.

A co-discovery conference is a participative process, so the audience will have an influence on the management of the organization. If the managers are not comfortable with this idea, there's no point in doing a co-discovery conference - it would be a waste of time.

Another consideration in deciding when to hold a co-discovery conference is the need to find a full day, or two consecutive half-days when all the relevant people will be available. Often this involves planning at least a month ahead.

4. Planning the conference

When you are planning a co-discovery conference, there are all these things to organize:

- The venue.
- How participants will be chosen - both staff and audience members.
- The days and times of the conference: two half-days or one full day?
- Choosing moderators and secretaries.
- How the conference will be recorded.
- How to follow up the conference results. (A co-discovery conference produces a plan, and without a commitment to act, the time spent will mostly be wasted.)

You need to plan at least a week ahead; preferably two weeks. The slowest part, usually, is finding the audience participants.

Choosing a venue

The best venue is a large room, with plenty of wall space to display the findings. To ensure no hidden agendas, everything written during a co-discovery conference is posted up on the walls, where everybody can read it and comment on it. The room should be at least 10 metres square - about the size of a large school classroom.

Much of the time, the participants will be working in small groups, of about 7 people each. So the room needs to be large enough that each group can have an uninterrupted discussion in one corner of the room. An alternative is to have enough nearby small rooms for each group to meet in.

The venue should not be the organization's office. This can discourage participants from speaking freely, and makes it too easy for staff participants to become distracted.

A practical question is where should the participants sit? There are three main choices:

- sitting on chairs, without tables
- sitting on chairs, at tables
- sitting on the floor.

All of these have advantages and disadvantages. But if the room is suitable, and the participants agree, sitting on the floor creates the best atmosphere of participation that I've found.

Choosing staff delegates

From the organization: choose staff who are in some way involved with communicating with the audience. For a broadcaster, this will include managers, broadcasters, reporters, and other program-makers. It will usually not include people such as clerical staff, accountants, or technical staff. If there are planning staff they should be included, even if they have no direct contact with the audience, because a co-discovery conference is a planning exercise as well as research.

To get enough staff who will come to the co-discovery conference, a few more will need to be selected, to allow for illness, sudden urgent work, and so on. Another alternative is to nominate an understudy for each designated attendee, to stand in for that person if necessary.

The ideal number of staff at a co-discovery conference is about 15. What if your organization doesn't have that many staff, or can't spare so many, all at once? In that case, I suggest you include more audience members. With less than about 8 staff, you'll miss too much. You could consider including some board members, or other people associated with your organization apart from audience members.

I suggest that all relevant staff should be told about the co-discovery conference, and asked to indicate their interest. There's no point in having delegates who are not interested, unless they are the managers most closely concerned with output to the audience. And if these essential people aren't keen, there's no point in holding a co-discovery conference at all.

Staff delegates should not be chosen as a favour, or a reward for good behaviour, but so as to include the widest possible variety of people, both in terms of current job and personal characteristics. The staff delegates should include young people and old people, men and women, senior and junior staff, long-serving staff and recently appointed staff. If anybody is strongly interested, even if their work doesn't involve audience contact, they should be invited too - they often have useful insights.

Choosing audience delegates

When you choose audience delegates, the same principles apply: include young and old, men and women, long-term and new audience members, city and country dwellers, rich and poor, educated and uneducated, enthusiastic and critical. All of them should be interested in the co-discovery conference, and able to spend a full day (or two half-days) there without interruption.

For people who are not minorities, but whose voices are (in all senses) less powerful, make sure you include plenty: women, the very young, the very old, and poorer audience members. It’s too easy for a co-discovery conference to be dominated by well-educated middle-aged men, whose opinions may not be typical of all audience members.

And of course, all should be audience members, or clearly identifiable as potential audience members (depending on the purpose of your conference) - there’s no use inviting people who seldom use your service.

Audience delegates can be selected in various ways:

- from a random screening survey
- through audience clubs (if these exist)
- maximum-diversity sampling
- snowball sampling
- broadcast notices (specially for radio stations)
- audience members who have contacted you in the past.

The more sources you use, the better - but don’t choose only people whom your staff already know. This makes the selection easier, but it won’t produce a representative sample of the entire audience.

Days and times

A co-discovery conference lasts for about 8 hours: one working day. Ideally, it will begin in the early afternoon, pause overnight, and finish the next morning. The advantage of the overnight break is that it gives participants time to review the first half of the proceedings, and come up with new ideas. People tend to be more creative in the mornings than the afternoons, but the co-discovery conference format needs to go through a fact-finding stage before it can move on to creativity. The disadvantage of spreading the conference over two days is that some people don’t turn up on the second day.

Other practical details

You usually need to pay the audience members for coming - partly because that's fair (a co-discovery conference is hard work) and partly because many of them don't come if they're unpaid. If they're paid, and reminded to come the day before the conference, about 20% of the audience members who say they'll come don't turn up. But if they're not paid, sometimes more than 50% don't turn up - leaving an unrepresentative audience sample.

How much should they be paid? This depends on local circumstances. Enough to make sure they come, but not so much that they bring all their family along too. We discourage this by giving each invited person a printed invitation with their name on it, and ask them to bring it with them.

So you need to prepare invitations, record the details of people who agree to come, organize refreshments, organize writing materials, recording equipment, and other obvious things like this. For a capable organizer, all of this takes a few days' work, spread over a week or two.

Conference managers

It takes at least two people to manage the co-discovery conference. One can be the moderator, organizing people into groups, making sure the groups all finish their tasks together, solving minor problems, dealing with disputes, and so on. The other can be the secretary, making sure that the output from the conference - both in writing and on tape or film - is recorded fully and consistently.

Training or experience in running consensus groups is good preparation for running a co-discovery conference. Don't even think about doing a conference until you've organized a set or two of consensus groups, and found out who among your staff has the best aptitude for these tasks. But unlike a consensus group, the moderator and secretary of a discovery conference don't play an active part in shaping the outcomes. They are there only to manage the process. The participants themselves must do the rest.

Managing a co-discovery conference is easy, most of the time. It's only when something goes wrong that management skills are needed

- if there's a violent disagreement among participants, or the group runs far over time.

The role of the moderator is to explain the process to participants, make sure that everything runs more or less to time, and solve any minor problems that get in the way of the smooth running. The moderator should not answer questions about the content of the conference. If he or she makes that mistake, the participants will come to depend on the moderator (with his or her apparently superior knowledge) and won't be so committed to produce their own plans - or to follow them, after the conference is over.

The moderator should not be the general manager of the organization, because many staff are reluctant to criticize their boss in his or her presence. It's fine for the general manager to be there some of the time, but not the whole time. We've also found it's not desirable for the general manager to open the conference - this makes the proceedings too formal. But if the general manager gives a closing speech, it's too late to make any difference.

Recording the proceedings

It's not feasible to have more than about 25 staff attending a co-discovery conference, but most of the organization's staff may be needed to implement the plans that the conference produces. Therefore the other staff should have the opportunity to see what happened at the conference. They probably won't have time to watch or listen to a full 8-hour record. A one-hour summary is usually enough. Also, the conference findings are on paper, for everybody to read.

To record a conference, you can use a still camera, a video camera, or audio tape. Each photo, video scene, or audio tape should be clearly labelled, so that everybody knows later where each part fits in to the whole. It's best to have a recording team of two people: one to operate the camera or tape recorder, and the other to write down what is being said at each moment.

A video report can be very persuasive - far more than a written report. Obviously, it requires a lot of skill to make a good video report, but if your organization is a broadcaster, you probably have staff with video production skills.

If audio tape is used, the recordist should sometimes talk to the tape recorder, telling it things which are obvious at the time, but could not be seen by people listening later.

It's not usually feasible to videotape the small-group sessions. However, still photography is effective - a photographer can roam around capturing important moments, or recording something on request.

A good record of a conference - whether on videotape, photos, or audio tape, can help to convince staff who were not present of the value of the conference and its findings. They will then be more willing to implement the plans made at the conference.

Timing

The conference has two main parts: research and planning. Each part lasts about half a day, or 4 hours. If the conference is spread over two days, the two parts are separated by an overnight break. If the conference fills a single day, the two parts are separated by a lunch break.

Division into groups

Each part has a mixture of individual work, plenary sessions, and small-group sessions. The small groups are much smaller than consensus groups: a maximum of 8 people per group - try to average 6 to 7. So a typical conference with 35 participants (not counting the main moderator and secretary) should be divided into 5 or 6 small groups - 4 is not enough. Each group should be almost equal in size. The more people are in a group, the longer it takes to do a task, and if one group is too large, everybody else will be waiting for that group to finish.

As the main work was done in the small groups, why have the plenary sessions at all? Answer: to summarize the findings of the small groups, to give all participants time to consider the implications of what they had said. Also, the brief summaries from the plenary sessions form the basis of the report that is distributed to people who weren't at the conference.

At other times, participants will work on their own: voting, writing, or thinking.

The mixture of small-group, plenary, and individual work keeps the conference interesting and gives participants various ways to express their views.

In the small groups, tasks are divided among the members:

- a moderator, who makes sure that everybody has their say
- a secretary, who writes down the ideas: somebody who can write quickly, clearly, and in large letters.
- a timekeeper, whose job it is to ensure that the group finishes on time.
- a critic, who is asked to disagree with what seems to be the consensus.
- a reporter, who reports the findings of the small group to the follow-up plenary session.

Because the groups are so small, everybody must take part in the discussion - unlike a consensus group, where the moderator and secretary contribute nothing themselves. Also (because the groups are so small) it doesn't require any special training to take up these roles. The groups themselves are asked to allocate the tasks between their members.

Each set of groups is a different combination of people, and each group should be about equally divided between staff and audience. A group of 6 people should have 2 or 3 staff members, and 3 or 4 audience. The rotation of people between groups offers more chances for useful insight, and the mixture of staff and audience gives each staff participant the opportunity to hear as many audience members as possible.

It can take a long time to divide people into groups. They are slow to decide which group to join. So do this in advance - rotating membership so that each participant gets a chance to speak to as many others as possible, and ensuring a good mixture of staff and audience, men and women, and old and young people in each group.

Wall space for everybody

Every participant had a space on the wall, and a small pad. The moderator said: "If there's anything you want to let everybody know, write it in large clear letters on a sheet from your pad, and stick it on the wall with masking tape, in the space we've reserved for you."

Most people never use these spaces, but others (who usually have some issue that they want to tell everybody about) fill their spaces with notes. If a participant goes on and on about some issue which doesn't interest others, they are encouraged to write it down and put it on the wall. This can save a lot of time and annoyance. Sometimes it even produces useful information.

5. Program for a typical co-discovery conference

Here we describe a typical co-discovery conference: a mixture of several that actually took place. No two co-discovery conferences are exactly the same, but this description gives a sense of how they work. This example was for a radio station called FM99.

5.1 First half-day: research

The purpose of the first half-day is to reveal audience and staff behaviour and beliefs related to the past, the present and the future. But this will not happen unless all participants feel comfortable working together. So an important secondary purpose is to quickly build an atmosphere of trust between all participants - both between audience members (who are probably all strangers to one another), and between staff members (who probably know one another a little, but may be suspicious about each other's departments and work roles).

Task 1. Arrival

It's often more than half an hour from the arrival of the first participant to the time when enough people are there to begin the proceedings. Audience members are often worried when they first arrive; they feel they don't know much about your organization. (They don't need to, of course, but even if you tell them this, they still worry.) So it's important to put them at their ease. If the staff members get there before the audience members, each audience member can be greeted as he or she arrives, and assigned to a staff member to talk to, until everybody is there.

This conference took an afternoon and the following morning; it began with everybody having lunch. The room was arranged with 6 round tables, each with six chairs. The staff members arrived before the audience members, ready to greet them. As each audience member arrived, a staff member at the door took their name, ticked them off on the attendance list, and sent them to a pre-arranged table with a name-tent waiting for them - between two staff members.

Soft music was playing in the background, and drinks were served before lunch. The atmosphere was more like a café than an office.

Audience members were asked to arrive at 12.30 pm, and the staff at midday. Large plates of sandwiches and fruit were put on the tables at 12.30. While the latecomers were arriving, others were eating.

Task 2. Questionnaire

At 12.45, everybody was given a short questionnaire (one piece of A4 paper) and a cheap pen, which they could keep. They were asked to fill in the questionnaires, giving:

(a) basic data about themselves...

- age group
- gender
- the area they lived in
- occupation

(b) their radio listening...

- the stations they listened to
- how many hours a day they listened
- and how many hours a week,
- how many years they'd been listening to FM99).

All of these were tick-a-box questions - it only took a few minutes to answer them. The purpose of these questions was to gather background data on the participants, to determine how typical (or atypical) they were of all FM99 listeners, to compare with a survey that had been done earlier in the year.

Those questions took most of the first page of the questionnaire. The back of the page had only two questions, each with a large blank space:

- What do you most like about FM99?
- How could FM99 be improved for you?

Task 3. Introduction

At 1pm, just as the last audience member arrived, the moderator began the official conference. She explained:

- Everybody's view is valid: the audience members are also experts in that role. (Many of them will have been audience members for far longer than the staff have worked for the organization.)

- All procedures are done openly. There can be no secret discussions in another room, trying to influence the findings.
- The power is in the hands of the participants. The moderator and secretary are there only to manage the agenda, not to decide the findings.
- A co-discovery conference needs everybody's full concentration. They should devote the whole day to it, and not try to do other work – such as phone calls to the office. Hand phones should be switched off. (That's why it's best to hold a conference well away from people's normal workplaces.)
- That everybody had their own space on the wall for notices.
- There will be no fixed coffee breaks, but if at any time you'd like something to drink or nibble on, refreshments are always available on that table over there.
- That everybody had a roster on a piece of paper, showing which table to go to for each group session.

Participants were then asked if they have any questions. Only a few still had questions (there'd have been a lot more if the audience members hadn't been talking to the staff members over lunch).

Task 4. Group session: Best of the past

It was now about 1.15pm, and time for the first group session. This was done in six small groups: the people already sitting at each of the six tables. Each group was asked to select a secretary, moderator, time-watcher, reporter, and a critic, and allowed 40 minutes for this task.

The topic for this session was "the best of the past." This is a modification of the technique of Appreciative Inquiry - another of the strands on which co-discovery conferences are based.

In this session, each participant was asked to think of one of the best experiences they'd had with radio. Audience members were asked for one of their best listening experiences, and staff members were asked for one of their best work experiences. Each was asked to consider "what made this experience so great?"

Two minutes' silence was allowed for people to think of the best experiences without disturbance. The moderator then called for a volunteer to speak first. (If there were no volunteers, the moderator spoke first.) Each participant spoke for a few minutes, describing their experiences. Following instructions shown on a large sheet of paper on the wall, the moderator then asked the participants to identify common themes - what did all these different "best experiences," some from audience and some from staff, have in common? How many of them were from FM99?

Finally, each group was asked to choose the two most representative experiences - one from audience, one from staff - to present during the next plenary session.

Task 5. Plenary: best of the past

The time was now 2 p.m, and everybody reassembled in the centre of the room. For each group in turn, a presenter briefly described the two selected experiences. The secretaries of the small groups had been recording these experiences in large letters, and these were now put on the wall, in the third area (working clockwise), after the first group session results and the personal areas.

Task 6. Voting: best of the past

A total of 12 experiences had been presented, and now it was time for the first voting. Each participant was given 2 sticky dots (green for staff, yellow for audience) and asked to put their dots on the two stories which were most similar to their own experience. The moderator said that staff could vote for audience stories if they wanted to, and vice versa. However, most participants voted for their own kind of story.

Task 7. Groups: Present activities

When the voting was over, the moderator said "Now we've looked at the past, so let's think about the present. Please form into 6 groups again - look at your roster, and go to the table shown for group session 3. Think back to the last time you were involved with radio, either as a listener or as a worker. Describe the situation you were in. To help you think of all the factors, the secretary is now putting some prompt sheets on the walls."

Again, a few minutes' silence was allowed, then each group member was asked to contribute a story, addressing all the points on the prompt sheets...

1. What day was it?
2. What time did you start listening, and when did you stop?
3. Which station did you listen to?
4. What program was it? What type of program was that?
5. Where were you?
   At home? At work? Somewhere else? If at home, which room?

6. Who was with you?
7. What else were you doing at the time ?
8. What type of radio were you listening to?
9. Why were you listening to radio at this time?
10. Was it your choice to listen, or somebody else's?
11. Was this a regular habit for you?
    Daily? Weekly? Or an unusual event?
12. How did you feel about it? What were your emotions?
13. After you'd finished listening, did you regard it as a waste or time, or a valuable experience, or in between?
14. What action have you taken (or will you take) as a result of listening to that program?

In their answers, participants were asked to address all these issues. After each participant had described their listening environment, the group secretary had entered the results in a table with 12 rows and 6 to 8 columns (one per group member).

Task 8. Voting on present activities

This time, instead of a plenary session, voting was done straight away - as soon as the five posters had been stuck on the wall. Again, each participant was given some sticky dots, with different colours for staff and audience members. There were 35 listening environments described on the wall, no two the same. Each participant had 3 sticky dots, to put on reports that they agreed with. Anybody could vote for any report (though in practice most participants voted for their own, and two others). As before, some staff members voted for some listening reports, but very few listeners voted for production reports.

Task 9. Groups: Personal futures

The time was now 3.30, and the moderator explained the next step. "We've looked at the past and the present. Now it's time to consider the future. We know the future is never completely predictable, but I'd like you all to think ahead and try to picture your daily life as it might be in two or three years - if something changed in your situation. Perhaps you already know that something will change - for example, perhaps your youngest child will leave school and also leave home. How might this affect the way you spend your time? Of course, that's only an example, and it may not apply to you. I have a piece of paper for everybody, and there are different versions of it." (The moderator waved the 35 pages, in six different colours - one for each of 6 age/sex combinations.)

The participants this time stayed in the same groups of 6 at each table, but were asked to work in pairs, producing individual answers. Delegates were asked to work with the person at the table most similar to them, in age group, sex, and employment status.

Many people find it difficult at first to imagine the future. Often, they say either "nothing will change" or "anything might change, so there's no point in trying to make a prediction." To break out of this situation, other people need to help them. That's why the group membership stays the same this time: because all participants in a group now know each other's present situations. Within each pair, each person in turned interviewed the other, helping them work out what their behaviour might be in such a situation.

The pieces of paper were distributed, with the colour depending on the person's age and sex. Each piece of paper listed four brief scenarios for describing a possible change for a person of that age group and sex.

White	young women (under about 25 years)
Pink	middle-aged women (about 25 to 50)
Green	older women (age 50 or over)
Yellow	young men
Blue	middle-aged men
Buff	older men

In the scenarios, there were three main variables:

- married / not married (single, widowed, divorced);
- working or not working
- children at home, or without children at home

Each scenario involved a change in one of these three variables, plus another related change; all scenarios were intended to cover common situations of personal change. For example, one scenario for older women read...

> Ayesha's husband died suddenly, and her married daughter asked her to leave her job at Pekan Baru, and come and live next to the daughter and her family at Bukit Tinggi.
>
> If you were Ayesha, how would this change the way you spend your time?
>
> What activities would you spend less time at?

What would you want to start doing? And how would this affect your radio listening - the time you spend, the stations you prefer, and the programs you'd listen to?

(The new place of residence in such scenarios is always the city or area where the research is done - otherwise the participants would not be well informed about it.)

Each table was also asked to assume a change in the social environment: a major recession, a new government with an opposite philosophy to the present one, a major change in the radio environment, a major change in other media, an environmental disaster such as a nearby volcanic eruption.

This third-person approach seems to work better than a more direct one, such as "Imagine your husband died and you lost your job." This is difficult for people to face, and they can't answer readily. But transferring their own preferences onto a fictional other person, and discussing this with several others, they are more able to reach a considered decision.

After everybody had created a story, and the interviewer in each pair had briefly summarized it, the three pairs at each table shared their stories, and chose the two most detailed stories to be retold in a plenary session.

Task 10. Plenary: retelling the future stories

Now the final plenary session of the day began From each of the 6 tables, the two stories regarded as most interesting were retold - usually not by the person who had told the story, but the person who had interviewed them. While each story was being retold, the main secretary took the existing summary and added more detail. As before, every participant was given 3 sticky dots for the 12 stories, and asked to choose the 3 stories that were most convincing to them.

So ended the first half-day of the co-discovery conference - just before 5 p.m. Before going home, participants were told that the next morning they would be coming up with ideas to improve FM99. Everybody was given a piece of paper, like this:

How can FM99... 1 ...attract new listeners?

2 ...improve its programs?
3 ...strengthen democracy in this country?
4 ...become more widely known and heard?
5 ...earn more revenue?
6 ...be more clearly distinguished from other local stations?
7 ...improve its listeners' lives?
8 ...overcome the barriers that are holding it back?

After the questions were some blank lines. People were encouraged to fill in these blank lines, adding questions that they thought suitable.

Let's review what happened in the first half-day, focusing on the small-group sessions in which the main work was done.

- Firstly, they looked at the past of FM99, reviewing its history, and picking out what both groups (staff and audience) considered its best moments.
- Secondly: they considered the present behaviour, helping the staff and audience better understand each other's problems.
- Thirdly: they looked at possible futures, hearing how members of both groups might react to various changes in their circumstances.

Much of the value of a co-discovery conference comes from the informal interaction between the participants. Though the detail of this is not recorded in the summaries, re-reading the summaries helps to bring back the variety of audience and staff experiences to members of the other group.

A co-discovery conference in Pekan Baru, Indonesia. As often in Asia, participants preferred to sit on the floor – since it was carpeted, and clean. Notice how the group of 9 is a little too large, and is splitting into two. The secretary (the woman with the red jacket) was having *trouble keeping track of both sets of conversations. The red and white boxes are nasi kotak: snack boxes. Not much gets done in Indonesia without nasi kotaks!*

5.2 Second half-day: planning

The second half-day of the conference is devoted to planning. The planning stage consists of 3 main sessions, each lasting about an hour. In this, ideas are generated, added to, combined, discussed, worked on, and put forward as tentative plans or possibilities for action.

Task 11. Brainstorming groups

Now that the audience and the staff understand each other better, the staff have a clearer view of what is acceptable, and the audience participants have a clearer idea of what is possible. So they are ready to begin generating useful ideas. The technique of brainstorming was used at this stage.

The purpose of brainstorming is for people to produce as many ideas as possible in a short time. At this stage, quantity is more important than quality. All ideas suggested are written up for all to see, and no criticism is allowed at this stage (it discourages people from producing more ideas).

Our example conference recommenced at 9 am. People had been asked to add extra questions to the list they took home the previous night, and 17 new questions had been added. After removing, there were 11 new questions, as well as the original 8. Though most of these were sub-sets of the original 8, all were added, and a new combined list of 19 questions was put on the wall.

The moderator spent 10 minutes explaining the principles of brainstorming, encouraging everybody to “loosen their minds” and come up with many ideas, no matter how wild.

This session also used 6 small groups, with between 5 and 7 people in each. As far as possible, people were mixed with others that they hadn’t yet shared groups with, and no staff members were in the same group as their boss.

Everybody was given about ten small sheets of paper and a thick pen. For the first 10 minutes, participants silently wrote down as many ideas as they could think of, one idea on each piece of paper. To help sort out the ideas later, participants also wrote down the question number for each idea. Any ideas that did not answer a specific question were called 20 - meaning “all other ideas.”

In the next stage (still in the small groups) each person explained their ideas to everybody else in the group, and the others were asked to think of ways of building on or improving each idea.

This stage lasted 20 minutes. As usual, it was noisy, with a lot of laughter. The brainstorming session finished with another 5 minutes of silence, with everybody having a chance to write down new ideas provoked by the previous discussion, or combine several ideas to create a new one.

Between them, the eight groups had generated 139 ideas, each one on a separate piece of paper. (Most pages weren't filled - but paper is cheap, compared with the value of people's time, and it's easier to use a separate page for each idea than to cut up the pages later.

It was now time for a voting session. Three participants hadn't turned up this morning, but the other 32 were there: 13 staff and 19 audience.

Task 12. Voting on initial ideas

The 139 pages were stuck to the wall, in 20 areas (1 for each topic, including "other"). Everybody was involved in sorting out the paper and taping the ideas to the wall, so this took only a few minutes.

> *A suggestion: use only one piece of masking tape per page - because the pages will soon be taken down again. And don't have a windy room!*

When the pages were up, it was time for voting. Each participant was given some sticky dots. But how many? A quick calculation was now necessary. To discriminate between the ideas, the average idea needs at least 3 votes. As there were 139 ideas, this required 139 x 3 or 417 sticky dots. With 32 participants remaining, each got 417 / 32 or 13 sticky dots. (But anything from 10 to 15 would also have been OK - the exact number isn't important.)

As before, staff and audience members were given different coloured dots - to see if there were major differences between staff and audience. There often are.

The number of votes for each idea ranged between none (for 43 ideas) and a maximum of 21 for the most popular idea of all - which was increasing the pay of the staff. (Not all ideas can be implemented, no matter how strong their support.)

For the next stage, the number of groups had to roughly equal the average number of people in each group. We'd prepared for this by setting out 6 tables, each for 6 people.

The papers for the 20 separate topics were now taken off the wall, and divided into 6 heaps (one for each group), with each heap having ideas that were broadly similar.

Dotmocracy in action, Banjarmasin, Indonesia. Participants have been voting by placing yellow and black sticky dots on the lists of statements. This was at the provincial office of Radio Republik Indonesia, where the only large sheets of paper available were purple. This conference took place in a large radio studio – hence the irregular walls with perforations.

Task 13. Adding detail to the ideas

The composition of this set of groups was based on people's interests. Participants were asked to volunteer for one of the 6 groups, each with 5 or 6 people. With a little persuasion, the moderator and secretary made sure that each group had at least 4 people, and no more than 7.

The moderator made a suggestion. "Think of a house," she had said. "Walls by themselves don't keep you dry, and a roof by itself can't be lived in. But put the two together, and you have a very useful invention. See if you can do that with some of these ideas."

Each group studied the ideas on the topic or topics that it was considering. They took all ideas in turn, discussed them, combined them (if several earlier groups had come up with essentially the same idea), and clarified them. Sometimes a single idea was split into two.

First, they discussed ideas with many or no votes. For ideas with a lot of votes, participants considered why they might be so popular, and whether other variations on those themes might be possible. For the ideas with no votes, they tried to change them to make them more attractive.

When all the ideas had been sorted, each idea was briefly discussed, and its meaning clarified - this sometimes involved rewording it. A few new ideas were added at this stage, and near-duplicated ideas were combined. The reasons for choosing each idea were also noted. (This can be helpful if an idea is later found to be not feasible; if its purpose is known, another idea which serves the same purpose might replace it.)

Nothing had been rejected during the brainstorming, but some ideas were already in use - unknown to those suggesting them. These ideas were now discarded. However, “we tried this once and it didn’t work” is not a reason for immediate rejection of an idea.

The group moved quickly through the pile of ideas, aided by the group’s timekeeper, who tried to keep everybody on schedule. The danger here is spending far too much time discussing one idea. If an issue can’t be resolved (by only about six people) in three minutes, it probably never will be. If no agreement was reached after three minutes, the next statement was considered. The question was: is this idea worth spending any time on? If most participants thought it was, they were asked to expand it in these ways...

1. ***What should be done****:* the original idea, perhaps changed, or combined with another idea.
2. ***Why it should be done:*** how this fitted in with FM99’s goals.
3. ***How to do it:*** a brief plan for how the idea could be achieved.

The average group considered 10 ideas in detail, and decided that 8 were not worth considering further. For the detailed ideas, an average of five minutes was spent on each, and the secretary wrote 50 to 100 words.

After each idea had been considered once, they reconsidered the ideas they hadn’t agreed on. This stage, as usual, was a slow one: it took an hour.

Task 14. Ideas Fair

In the final planning stage, the ideas set out previously were now explained to all other participants.

This was done by re-forming the groups: the same number of groups as before, mostly with different people - but each new group had at least one member from each of the previous groups. Each previous group left its papers in the area it worked in. Each new group walked around the wall space, considering every set of ideas in turn. Whichever member of the group who had put up those ideas explained the findings, and answered the others' questions about them.

The rotation in the Ideas Fair ensured that every participant had a chance to have every idea explained. This stage helped to make the reasoning behind each idea very clear.

Task 15. Voting on developed ideas

Following the Ideas Fair, the detailed ideas were put up on the wall, still in their nine groups. By now there were 60 detailed statements with detail added, and another 45 which no body had thought worth considering in detail. Every participant was given another set of new sticky dots (different colours, this time, still distinguishing between staff and audience) and again asked to vote on the ideas - but now with a more detailed knowledge of what was being proposed. With 105 ideas, to average 3 votes each, 315 dots were needed, so each of the 32 remaining participants was given 10 dots. If they really liked one idea, they could put multiple dots on It. “But if you do that,” said the moderator, “please overlap the dots, so people will know how many participants voted for each idea.”

Task 16. Fitting it all together

This is best done on the floor, because it involves assembling the ideas in some structure. So a large floor space was cleared, and ideas put in an appropriate place (by the main secretary, with advice from others standing around.

Some of the ideas were very similar to others, even though they had been placed in a different topic. These were now combined..

When most people were satisfied with the arrangement, the secretary and the moderator took it off the floor, piece by piece, and stuck it on a large sheet of flexible cardboard, 2.4 metres wide and 1.2 metres high. After the conference, this sheet was rolled up, taken back to the FM99 office, unrolled, put on the wall, and used as the basis for a written plan.

Task 17. The end

The staff participants will meet again, back at work, so there's no need to discuss follow-up procedures in detail. However, the audience members, who do not have continuous contact with the organization, always want to know what will happen next.

At this point (12.30pm), the general manager of FM99 arrived, thanked everybody, and assured them that they had not wasted their time. A follow-up team was announced, to make sure that everything planned at the conference would really happen - if possible.

That was the end of the conference. By this time, the participants were enthusiastic, even excited. As often happens, many of them didn't want to leave, so the conference finished with a celebratory lunch.

6. Follow-up

Review

After the conference has finished, the staff participants meet, in a short consensus group. While the conference is still fresh in their minds, they discuss what they learned, what further questions the conference raised, and what should be done next. This should be done as soon as possible - e.g. after the final lunch. The longer you leave it, the more you forget.

Reporting

Usually a report is written, summarizing the conference. It will be easy to write, because it will consist mostly of the papers that were stuck on the wall. It's a good idea to include some photos in the report, too. When participants read the report later, the photos will remind them of the process and what was agreed.

If the organization is committed to audience participation, it should send all the audience participants a copy of the report. If it's a media organization, it can publish the report, as a program, an article, or web page.

Follow-up action

The danger with a co-discovery conference is that, at the end of the day, everybody is clear about what should happen, but nobody ever gets around to doing it. If this happens, all the work is wasted.

That's why it's important to assign an effective team to follow up the conference: staff who are important enough that everybody respects them, but not so busy that they have no time to make sure that the conference plans are carried out.

7. Adapting the method

The outline given above is one example of a co-discovery conference, not a rigid set of rules to be followed. Every conference is different. You can adapt the timetable for your own needs, bearing in mind these simple principles:

- The first half-day is for research (with the audience and the staff finding out more about each other), considering the past, the present, and the like future.
- The gap between the first and second half-day gives people time to think of new ideas.
- The second half-day is for idea generation and planning.
- It's not possible to do all this in less than a day.
- At the beginning, it's essential to gain the confidence and trust of the audience members.
- No session should last longer than an hour. People need a chance to stretch their legs, and re-form their views.
- Plenary, small-group, and individual work should alternate - to keep participants from being bored, and to stimulate new thoughts.
- Findings should be visible to everybody: recorded in large letters, so participants can easily read them and build on them.
- It's important to get detail in the statements of ideas. If a statement is too short, it won't be clear after the conference. Each final statement should include:
    - what should be done,
    - why it should be done, and
    - how to do it.
- At the end, set up a team to implement the findings.

The example used here was for a radio station, but the same method can be used for research and planning for almost any creative organization - as long as it has some keen audience members, who are willing to spend a full day helping to improve the organization.

Problems with co-discovery conferences

When dealing with any fairly large group of people, there are always some problems that arise because of the way people related to each other in groups. Any experienced school teacher knows this. Sometimes quite firm guidance is needed from the facilitator.

Problem 1: Getting a broad mix of participants

It's important to use many different sources for selecting audience participants, to help ensure they won't all be "tame" and be overtaken by groupthink. Though it's easy and tempting to draw all audience members from a single source – such as the members of the listener's club – this usually means that they have too much in common. Even worse is to draw all the participants from friends and relatives of the staff. The more different sources you use, the stronger the findings.

Problem 2: Groupthink

When this happens in a co-discovery conference, the consumers sympathize so much with the producers that they become atypical, and effectively stop representing the audience. This can happen when the producers overawe the consumers with their incredible skill or knowledge, or greater numbers, or unimaginably good facilities. Solutions to this are as stated earlier:

- Consumers should visibly outnumber producers
- Power displays should be avoided, such as the head of the organization giving a preliminary speech to the group.
- Hold the meeting away from the premises of the producer organization, perhaps in surroundings slightly shabbier than consumers might have expected.
- The facilitator may need to intervene, if staff begin to dominate the proceedings, and offer the audience more of a chance to speak.

Problem 3: The facilitator dominates

However, the facilitator needs to keep two aspects of the process quite clear: his or her job is to manage the mechanics of the way the group operates. It is never to interfere in the contents. The moment a facilitator starts making "suggestions" (perhaps in the hope of speeding up slow proceedings) the creativity of participants dries up. They see the facilitator now acting as a leader, and it is a leader's job to make decisions and draw conclusions.

8. Further reading

So far, everything on the co-discovery conference has been written by me. Hopefully, that will change before long. The publications to date are:

Dennis List: *Know Your Audience: A Practical Guide to Media Research.* Original Books, Wellington, New Zealand. 2nd edition, 2005. Chapter 15, which covers the co-discovery conference, is a shorter and earlier version of this booklet.

Dennis List: "Research by infusion: the co-discovery conference." Australia and New Zealand Marketing Academy Conference, November-December 2004. Proceedings online at www.anzmac.org. This is a more theoretical paper, with a bit of a positivist slant (to match the prejudices of academics in marketing). I'm hoping to balance this by having an article or two published in some qualitatively oriented international journals.

Related methods

Here are basic readings on some of the "large group intervention" methods that the co-discovery conference has drawn on. There are two general books on this class of methods; they overlap surprisingly little, and complement each other well:

Barbara Benedict Bunker and Billie T Alban. *Large Group Interventions: Engaging the Whole System for Rapid Change.* Jossey Bass, San Francisco, 1997.

Linda Ellinor and Glenna Gerard. *Dialogue: Rediscover the Transforming Power of Conversation.* John Wiley New York, 1998.

Search Conference

The best single introduction to the search conference is the book *The Search Conference,* by Merrelyn Emery and Ronald Purser. Jossey Bass, San Francisco, 1996.

A good introduction on the Web is an article by Steven Cabana, Fred Emery, and Merrelyn Emery. It's entitled "The search for effective strategic planning is over," and was last seen online (May 2006) at www.nmsu.edu/~iirm/articles/cabana1.html

Consensus group technique
Dennis List: "The consensus group technique in social research." *Field Methods,* vol.13, no.3, pp.277-290, 2001. This is a concise introduction to the method. I've also written a detailed manual for consensus groups (in the same series as this one); it was published by Original Books, New Zealand, in 2005. In New Zealand it is available through the publishers, and internationally through Audience Dialogue's website, www.audiencedialogue.org

Future Search
Marvin Weisbord, along with Sandra Janoff, is the developer of Future Search – an offspring of the Search Conference. A comprehensive book on the method is Weisbord and Janoff's *Future Search: An Action Guide to Finding Common Ground in Organizations and Communities.* Berrett-Koehler, San Francisco, 1992.

Open Space Technology
Harrison Owen has been developing the Open Space method since the 1980s. His book *Open Space Technology: A User's Guide* is published by Jossey Bass of San Francisco, in 1997.

Appreciative Inquiry
David Cooperrider was the originator of this method, which seeks to build on the best of the past in an organization. One of the clearest explanations of Appreciative Inquiry is the 1999 book *Locating the Energy for Change,* by Charles Elliott. The whole book is available on the website of the: International Institute for Sustainable Development, Winnipeg. See www.iisd.org

Brainstorming
Everybody thinks they know how to do brainstorming, but some approaches are much more productive than others. The article by John Rossiter and Gary Lilien, entitled "New 'brain-storming' principles" (in the *Australian Journal of Management,* vol. 19 no.1, pp.61-72) demonstrates the best practice.

World Café
An even newer method than the co-discovery conference, but sharing some of its small-group characteristics. World Café was developed by Juanita Brown in the late 1990s. A clear introduction can be found in the 2005 book by Juanita Brown, and David Isaacs: *The World Café: Shaping Our Futures Through Conversations That Matter.* Published by (you guessed it!) Berrett-Koehler of San Francisco.

Philosophical background to the co-discovery conference

From books and articles on the practical background to the co-discovery conference, we turn now to some of the philosophical background texts. These can be hard going, specially the writings of Habermas, but they are important contributions to philosophical thought. You don't need to read these to do a co-discovery conference, but you might like to dip into them after a conference, to help make sense of what you've found.

Jürgen Habermas: *The Theory of Communicative Action: Reason and the Rationalization of Society,* volume 1, translated by T McCarthy. Beacon Press, Boston, 1984.

A summary of Habermas' thinking is *The Recent Works of Jürgen Habermas,* by Stephen K White. Cambridge University Press, 1988.

Ikujiro Nonaka and Hirotaka Takeuchi: *The Knowledge-Creating Company: How Japanese Companies Create the Dynamics of Innovation.* Oxford University Press, 1995.

Michael Polanyi: *The Tacit Dimension.* Doubleday, New York, 1966.