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INTERVISION

Dialogue methods in action learning

action learning

codéveloppement

intervision

同行反思

pares reflexión

peer reflection

ピア反射

intervisie

피어 반사

peer riflessione

akran yansimasi

сверстников отражение

wzajemnej odbicie

सहकर्मी परतबिबि

peer review

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Preface

*I hear and I forget
I see and I remember
I do and I understand*

CONFUCIUS, CHINESE PHILOSOPHER AND REFORMER (551-479 BC)

What questions have you heard recently that made a decisive impact on your work?

A conversation only gets interesting when the questions really matter. Good questions can bring about change far better than any answers you might get. We're fascinated by what intervention can achieve – how it leads to fast, targeted change in people and organizations. Intervention gives you insight into how you behave at work and what you can do to improve that. Professionals can use this book to systematically learn how to gain insight into your working style, and through self-reflection find improvements to implement. You do this by asking constructive questions. Knowing how to ask helpful questions is also useful in other aspects of work.

Intervention is based on the idea that you alone are ultimately responsible for your own behavior. You learn to look differently at yourself, at what you do, and search for things to improve. In intervention, you take charge of your professional development, your expertise in your field, the way you work with others and your personal performance.

In our field we've noticed that intervention courses are often limited to swapping work experiences, giving advice and solving known problems. We think it's time for a change; it's time to bring in more focus and depth as this leads to sustained change and development. That's why we wrote this book. Good intervention dares go one step further, to the level of self-reflection and research into underlying views and behavioral patterns – the hidden drivers behind the things that confront people and subconsciously keep on acting out in their lives. If you can reach that deeper level, permanent change becomes possible.

This book is about using intervention as a professional learning and development tool for individuals, teams and organizations. For beginners, it will introduce you to a method that gives fast results, takes little time to learn

and can be used by any group in any organization. For the more advanced, this book fine-tunes intervision into making a deeper contribution to your own development and that of the organization for which you work.

Organizations have goals: to make a profit, deliver quality, satisfy customers or attract talent. Goals associated with people can sometimes be hard to achieve but go a long way in determining the successful attainment of the pursued result. Good intervision can help with this.

Applying intervision in international organizations is a challenge because of the role cultural differences may play in the intervision group. We would like to introduce professionals all over the world to our experience with intervision and tell you about the diverse methods we use.

We hope our book will encourage individuals, teams and organizations to use intervision as a tool for professionalization.

We look forward to hearing your comments, impressions, suggestions and questions (www.networkintervision.com).

We want to thank everyone who contributed to the completion of this book that, we hope, will further spread the news about intervision both within and beyond Europe.

Monique Bellersen and Inez Kohlmann

GORINCHEM, THE NETHERLANDS, 2016



Highlights for relevant information or instructions

Intervision: dialogue methods in action learning

- 1 What is intervision?
- 2 Intervision and change
- 3 Intervision, personal and organizational development
- 4 Intervision in a nutshell
- 5 Phases in the intervision process
- 6 Prerequisites
- 7 Roles
- 8 Case and case question
- 9 What questions should you ask?
- 10 Pitfalls
- 11 Reflection
- 12 Method selector

What is intervision?

People are not disturbed by things, but by the view they take of them.

EPICETETUS, ANCIENT GREECE

Intervision is a form of expertise development in which professionals call on their colleagues, fellow professionals or peers to help them gain insight into the problems they have at work. A group of five to eight participants unravels a problem submitted by one participant, the case provider, by asking questions in one or another intervision method. The participants try not to come up with solutions, but by asking questions, encourage the case provider to think up his own answers. The questions should help the case provider develop new ways of thinking, gain insight into his own case and through these insights, develop new and alternative ways of behaving. Following the selected intervision method, the facilitator guides the discussion of the case.

Intervision is about dealing with your own issues on the job, your working style and the personal or professional views that influence it. So intervision is always connected to everyday practices, professionalization, learning and self-improvement.

Intervision makes you aware of your individual style and personal views of your work. These play a crucial role in the way you handle your job and thus also affect your organization. We call them hidden drivers: your own implicit beliefs that drive you in your work. At intervision sessions you help each other to uncover and clarify your hidden drivers, so that you can find and make improvements. You first have to see what drives you to have the problem, before you can do something about it.

The aim of intervision is to help you work more effectively. Intervision means enhancing professionalism, gaining insight into your own role, behavior and working style, as well as your own views and beliefs which affect your work, often subconsciously.

Action learning and intervision

Action learning focuses on everyday reality by using real-life cases. The idea behind action learning is that learning and working go hand in hand so that knowledge becomes directly applicable. The method was originally developed in the 1940s by Reg Revans (1907-2003) in response to the ever-increasing changes in the (working) environment. Groups are encouraged to share their daily work experiences and, by asking questions, to reflect continually. This helps to intensify learning and ensures that participants gain new insights and find their own, directly applicable solutions.

In action learning, learning and working go hand in hand and the immediate surroundings play a big role. This makes it different from traditional learning. Revans translated his theory into a formula that describes how people gain insight into what they experience, see and feel: $L=P+Q$. In this formula L stands for learning, P stands for programmed knowledge, based on previously gained or embedded knowledge, and Q stands for questioning insight, where assumptions and thoughts are investigated by asking questions and by listening and learning carefully.

Questioning insight focuses on double-loop learning (described by Argyris and Schön) which pays more attention to the cause of the issues and where solutions can be contrary to the thoughts and norms followed either by individuals or their organizations. In double-loop learning, no changes happen within the existing system frameworks, it is those frameworks that actually change.

In action learning, you learn individually but also as a group, working on a real issue and reflecting on actual behavior. Michael Marquardt suggested extending the formula to guarantee the value of good reflection: $L=P+Q+R$. The R refers to reflection.

The action learning process can take a long time. It includes the following important elements:

- a challenging real-life project or problem;
- a varied group of (5-8) people who are connected to each other through their functions (e.g. project members, managers, clients);
- a process focused on reflection, questioning and listening;

- a focus on learning;
- commitment to act;
- a process supervisor.

Like intervision, action learning ties into daily practice. The intervision methods described in this book can be of help when reflecting in-depth on real-life cases. These methods provide many tools for investigating your own assumptions and norms. The varied approaches make it possible to choose the right method for a case (question), because different issues ask for different ways of questioning.

In both action learning and intervision the key is the individual's ongoing reflection and their job in the organization. This leads to continuous learning that contributes to the development of the organization.

Other terms

When we talk about the professionalization of an individual or organization, several terms are used in practice. Let us clarify some of these terms to highlight how they differ from intervision.

Peer consultation

Peer consultations are usually for groups of colleagues in one field or multidisciplinary groups of professionals. The goal is to increase a person's professionalism by discussing their own experiences and issues with regard to their profession/job and to review these against the views of the other participants or the professional standards. It's often about reviewing a person's knowledge and skills, behavior and decision-making.

It is also possible – if it involves colleagues – to compare a person's actions with the norms and guidelines of others in the same field. Especially professional expertise, professional ways of acting and professional views will be discussed.

Peer review consultation differs from intervision because of its evaluating, judgmental character. The latter is absent in intervision because it is aimed at discovering your own style and views on the job.

Coaching

Coaching is a form of personal guidance based on a one-to-one relationship. In coaching the emphasis is on support in a specific situation or to complete a specific task. This relationship is hierarchical because the coachee learns from the discussion and the coach supports and guides them through their issues. This is a confidential journey between coach and coachee.

In intervision hierarchy is completely absent; the key point is the equality of the participants and learning from each other. That is why intervision always takes place in a group.

Supervision

Supervision is vocationally-oriented, on-the-job guidance, where a person systematically learns how to deal with specific issues they have in their work situation. It's about reflecting on your (own) work experience to learn how to function better. In supervision the emphasis is not just on learning from the current situation but also from ones yet to come. Supervision is led by a supervisor, someone who has a different relationship to the person being guided, either because they know more about the issue or because they hold a higher hierarchical position. This is unlike intervision, where relationships are equal and where you work as a group.

Mediation

Mediation is a professional intervention that helps resolve a conflict between two or more people, parties or groups. The aim is to find a joint solution by talking with each other. The goal is not to find a solution that all parties are totally happy with, but to create a consensus that all can agree with and that meets their own interests acceptably. They are helped in this by the impartial third party, the mediator.

This book focuses on intervision.

Intervision methods

Method 1	A4 method: text interpretation
Method 2	Appreciative Inquiry
Method 3	Balint
Method 4	Clinics
Method 5	Gossiping
Method 6	Governance and code of ethics
Method 7	Helpful questions
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A4 method: text interpretation

Short description of the method

The emphasis is usually on the spoken word in intervision. Written texts are not used very often, even if they can give a lot of information about the case provider. Writing things down records the content of the case well, sometimes even better than when it is communicated verbally. The writer becomes 'the reader' of their own text. They re-read and revise it, and make additions until the language and images called to mind are complete. Consequently their text is carefully drafted.

This intervision method comes with a handwritten case description as a source of information on the case, which gets handed out at the intervision meeting. The characteristics of the writer stand out because of the way they have presented their text. How does the text reflect the writer? How do they form sentences, how do they divide the contents over the pages, do they underline things? What does this all say about their approach? Form and content are important, but just as important is what the writer leaves out. These aspects make the author's working method, thinking processes and/or underlying views and values apparent. In this intervision method, the group discussion includes these kinds of observations regarding the case provider's case.

What are the benefits of the A4 method: text interpretation?

People can give direct feedback on their first impressions of someone. You can do that with verbal presentations but it works just as well with written presentations, especially when a text describes a personal case. With the A4 method, a person gets quick feedback on their suppositions and particularly on their way of thinking and ways of solving problems. Through the written text, their (additional) beliefs and assumptions become clear. Besides this, the process of writing down a case down is a good way of already starting to reflect on it.

Advantages and disadvantages of the method

ADVANTAGES

- The method doesn't take much time.
- The writing is itself a kind of reflection because the case provider formulates their texts carefully.
- The method includes a different form of observation.

DISADVANTAGES

- The method is less suitable for someone who finds it difficult to express their case in writing.
- Using a text can be quite confrontational; you're putting everything down in black and white.
- If the text is not personal the method will not yield much.
- The role of the case provider will not be as big as in other methods; for example, there is no extensive clarifying round of questions.

Pitfalls

Participants are often inclined to highlight their own assumptions about the content of a case. With this method all they have to do is observe what they can and cannot find in the written description. Their own presuppositions will not be dealt with. Participants can also disrupt the process by not limiting themselves to actual reflection on the words used and the construction of the text but by expressing all kinds of opinions or hypotheses in their feedback. The learning curve is greatly reduced when people are trying to be nice, too polite and conforming. This method requires you to be not afraid of confrontation and to say what you think directly yet respectfully.

Conditions for use

Conditions		
Duration	Group size	Items required
		
1.5	5-8	Copies of the handwritten text

Relevant to facilitator				
<i>Essence of the method</i> 	<i>Extra preparation</i> 	<i>Experience with facilitating intervention</i>	<i>Knowledge and experience with facilitation of this method</i>	<i>Experienced group necessary</i>
Characteristics of how the case provider is handling the case, based on the appearance of the handwritten text	Handwritten text on A4	+	+	-

Participants need experience in giving feedback because the case provider has to be able to listen to the responses and will respond to them only later. This intervention method is different from other methods because case providers usually get the opportunity to explain their case first.

A case that requires specific guidance is less suitable for the A4 method. In this method, it is all about how the case is described in the text. Participants should be able to keep their distance from the actual content and concentrate on the appearance of the text without interpreting it.

There needs to be a good sense of security in the group for this method to work well. That is why this method is not suitable for an inexperienced group. The case provider prepares the text but does not distribute it before the meeting.

Steps

Preparation

The facilitator and case provider discuss the case, the case question, and choice of method beforehand. The case provider prepares the case. They draft the description of the case that they want to submit, adding their opinions, associations and feelings. They write on sheets of A4 (or letter-sized) paper and make copies for all participants and the facilitator. The case provider informs the participants about their choice of method but does not distribute their case description beforehand.

STEP 1 *Description of the case*

The facilitator instructs the participants how to ‘read’ the text. The text is then be handed out.

STEP 2 *Read and observe*

The participants look at the handwriting, read the text and note down their observations. What do they see? What individual images does it call to mind? What do they deduce from it? How important do they think their observations are? No questions just yet.

When reading/looking at the text, use the following order of perspectives:

- First, the *actual layout of the text*.
For example: what does the handwriting look like at first sight, without reading the words? The layout could be: very orderly, arranged in steps, fluent, chaotic, expressive, underlined, well-shaped letters, much white space, etc. What can you tell about the length of the sentences, the use of small or capital letters, punctuation marks?
- Then, the *use of language*.
For example: do they write in the first person (I) or other persons (you, he/she)? Do they use many verbs or not? Is the choice of words original or have they depended on jargon? Are there lots of clichés or stereotypical expressions? Do they use active words (aimed at initiative and performing) or passive words (aimed at thinking and waiting)? Does the text contain a timeline? Is it about the case provider, as a person or as a professional, or about someone else (e.g. a client), about a specific situation, or about the profession? What stands out and what doesn’t? What does the text say and what does it leave out?
- Finally, the impression the text makes.
For example: is it focused or without purpose? Does it show an understanding of the past, present and future? Is the text emotional or rational, passive or active, vague or specific, modern or old-fashioned, superficial or profound, energetic or hesitant?

STEP 3 *Give observations*

The participants give their observations based on the three perspectives (above) without making assumptions or giving negative opinions and without going into the content itself. What have they noticed about the words and sentences of the case provider? What parallels do they see, what is missing, what can be the effect of this? The facilitator can decide to discuss the per-

spectives individually. The case provider listens and writes down the feedback (if necessary making notes on the emotions that the feedback evokes), but does not respond yet.

STEP 4 *Gossiping (optional)*

The participants gossip about their observations in step 3. They do this with respect and without psychoanalyzing the case provider. The facilitator watches out for this. This optional step can give the case provider new insights (for further explanation, see Method 5, Gossiping).

STEP 5 *Summary and feedback*

The case provider summarizes and gives feedback on the observations. Tools for this include:

- What stands out in the observations?
- What has been mentioned more than once?
- What do they recognize?
- What moved them?
- What comments do they find understandable?
- What can the underlying reasons be?

STEP 6 *Deepening the feedback*

The participants can deepen their feedback by asking the case provider open-ended questions. These questions should help the case provider to clarify their way of thinking and presuppositions. The questions should not be about the content of the case but about the text, as it is. Comments from the case provider ('I wanted to write that down differently', or 'you should read that differently') can generally be considered as resistance.

The essence of the method is that it is based on what is said literally, not on what someone possibly could have meant (after criticism). Thus, the participants ask themselves what can be deduced from the wording of the text and afterwards discuss the difference between the actual text and the intentions of the person involved. This deepening round focuses specifically on the points that the case provider finds hardest to bear.

STEP 7 *Case provider: insights and action plan*

The case provider indicates the insights they have gained, what they plan to change in their behavior and the points they have formulated to achieve this change.

STEP 8 *Participants' insights*

Each participant writes down their own insights. What did they learn from this case? It could be something to do with the preferred ways of thinking and asking questions, what made a question constructive or obstructive, or what they learned from other participants' questions, etc.

STEP 9 *Reflection on intervision*

The facilitator reflects on the intervision session with the case provider and the participants. This reflection is aimed at:

- the results of the case discussion;
- the case as a learning tool and the success of the applied method.

Background

One of the founders of the reflection technique is Donald Schön. He distinguishes various forms of reflection. Reflection in action is the integrated process of thinking while doing, of improvising in ongoing action learning. Reflection on action points to retrospective reflection, evaluation of the effects of acting with regard to pre-defined goals. Finally reflection on reflection in action: reflecting on one's own reflections. The A4 method of text interpretation can support this last form of reflection.

Text analysis is a different way of looking at things. Not at the content of the message, but at the way it is expressed, the form (such as the use of space on a piece of paper or the frequency of certain words, the decisiveness or carefulness, etc.). The layout is the level of involvement in the communication; it says more about the maker than the content of the information that was passed on.

LITERATURE

- Feltmann, E., B. Lubbers, M. Metsemakers, G. Dijkgraaf, *Denkadviseren, Over de relaties tussen de taal, het denken en de problemen van mensen in organisaties*, Mediawerf, 2010.
 Schön, D., *The Reflective Practitioner, how professionals think in action*, Basic Books, 1983.

A4 method: text interpretation

Preparation

Case provider (CP) and facilitator (F) discuss the case and choice of method. CP writes the case down by hand on a sheet of A4, adding their opinions, associations and feelings. The text is not distributed beforehand.

Step 1 Description of the case

The CP distributes copies of their text to the participants (Ps) and F but does not explain the case verbally. F instructs Ps how they should read the text.

Step 2 Read and observe

Ps look at and read the text and write down their observations and interpretations about the actual form and appearance of the contents. After that, they look at the use of language: word usages, timeline, etc.

Step 3 Give observations

Ps give their observations and personal interpretations. CP listens and makes notes for feedback.

Step 4 Gossiping (optional)

Ps gossip about their observations in step 3, while CP listens. Ps do this with respect.

Step 5 Conclusion and feedback

CP summarizes the observations and responds to the feedback.

Step 6 Deepening feedback

Ps can deepen their feedback in response to the comments from the CP.

Step 7 Case provider: insights and action plan

CP reveals and shares the insights they have gained.

Step 8 Insights of participants

Ps write down and share their own insights.

Step 9 Reflection on intervision

F asks CP and Ps how they felt about this intervision session.

About the authors

Monique Bellersen and Inez Kohlmann are management consultants active in the field of intervision. They aspire to further develop intervision and introduce it internationally as a professionalization tool for individuals, teams and organizations. They have taken the initiative of starting an international knowledge-sharing network in the field of intervision.



As a management consultant, MONIQUE BELLERSEN CMC (Certified Management Consultant) focuses on improving how (people in) organizations function by acting as a driving force for innovation and finding creative directions and solutions. She finds developing entrepreneurship and improving the relationship to the market the most important.

Working against the economic tide of the time, Bellersen established a successful consulting firm early on in her career. From a multitude of diverse projects and assignments she gained experience with complex and socially relevant issues. Further, her experience lies in business services and the government, especially in the field of customer-driven entrepreneurship and organizing. She constantly challenges herself to stretch limits and look for entrepreneurial opportunities by targeting new connections. She has, for instance, worked in China as a visiting lecturer and also helped Dutch entrepreneurs achieve their corporate targets in Asia. She guides intervision groups and gives training courses, workshops and presentations on this fascinating subject.

Publications: Project management in: *Modellenboek beleidsplannen*, (1980) VO and BVE.

Books: *Leiderschap in het Onderwijs* (2009) SDU publishers. Bellersen, M. & Kohlmann, I (2009 and 2013). *Praktijkboek Intervisie*. Deventer, Nederland: Vakmedianet. Bellersen, M. & Kohlmann, I (2009). *Praktijkschrift Intervisie*. Deventer, Nederland: Vakmedianet.



In her work INEZ KOHLMANN CMC, MSC ACM (MSc in Advanced Change Methodologies) focuses on strategy and change processes in people and organizations and makes sure that the resulting dynamics achieve goals. These dynamics arise through various viewpoints and creative and original approaches.

Inez Kohlmann focuses on boundaries and finds that the most opportunities arise where two fields come together. By linking daily practice and working together, she manages to motivate other people to turn resolutions into real action in an authentic way. Clients describe her as surprising, businesslike, driven and professional.

Kohlmann has advised industry and government on organizational and innovative issues since 1990. She is also affiliated to the HAN University of Applied Sciences where she contributes innovative teaching methods and connects industry and education. She guides intervision groups and gives training courses, workshops and presentations on this subject. She speaks the language of industry as well as that of governments and knowledge institutions and identifies what is going on. Her to-the-point, innovative approach creates sustainable results.

Publications: 'Door 'connecting and sharing' veranderen' in: Management Essay Prijsvraag of De Baak, *Verandermanagement*, Academic Service (2005), pp.97-125. 'Verhaal maken', in: *Management Essay Prijsvraag of De Baak, Wat doen organisaties met mensen*, Academic Service (2006), pp. 47-61. 'De gelaagdheid van ontwikkeltrajecten benutten' in: Gerhard Smit & Etiënne Rouwette (red.), *Ruimte maken voor onderzoekende professionaliteit*, Van Gorcum (2009), pp. 233-263.

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Intervision is a form of expertise development in which professionals call on their colleagues and peers to help them gain insights into the problems they have at work. A group of five to eight participants unravels a problem submitted by one participant, the case provider, by asking questions using one or another intervention method.

This book explains the top 10 best intervention methods.

The book is about how to use intervention as a learning and development tool for individuals, teams and organizations. It will introduce beginners to a method that gives fast results, takes little time to learn and can be used by any group in any organization. For the more advanced, the book fine-tunes intervention into making a deeper contribution to your own development and that of the organization for which you work.

Monique Bellersen and Inez Kohlmann are management consultants active in the field of intervention. They aspire to further develop intervention and introduce it as a professionalization tool for individuals, teams and organizations around the world.

