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ABSTRACT

This short training exercise is meant to demonstrate to volunteer managers and/or board members what is likely to happen to written instructions they send out. The exercise is particularly instructive for national organizations that want to implement major change in their local chapters. It illustrates that agreed-upon directives for change, conveyed only in writing without back-up support, can lead to confusion when implemented. The exercise can be used to start a workshop (or lecture) on organizational development or the management of change.

Balloons and Organizational Change (A Training Design)

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TRAINING DESIGN

GROUP SIZE AND TYPE:

No fewer than 10 to ensure there is a range of differing results. The best audience is made up of national headquarters paid staff and board members or volunteer managers and board members of local chapters in national, multi-level organizations.

LEARNING OBJECTIVES:

To help internalize the fact that change management or organizational development is not simple and that it may be naïve to expect change to be implemented as directed.

TIME REQUIRED:

Approximately 10 minutes.

MATERIALS:

Balloons for everyone, flipchart or overhead projector, and a place to keep the balloons until they are returned to the

participants to take home with them after the workshop/lecture. The two overhead sheets or flipchart pages should include 1) the instruction to inflate the balloons and 2) a summary of the results of the exercise.

PHYSICAL SETTING:

This training exercise can be carried out in all kinds of settings, but a room where everyone can sit comfortably is best.

THE PROCESS:

0-2 minutes

After welcoming the group and introducing the goal of the workshop/lecture, the trainer opens by saying, "We are going to do something new, something funny, to prove a point."

2-4 minutes

The trainer starts by turning to the first flipchart page or overhead sheet that says, "INFLATE THE BALLOON!" The

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trainer reads aloud this simple instruction (nothing more) and gives everyone a balloon. (Someone can assist in the distribution.)

4-6 minutes

While the participants inflate the balloons, the trainer walks around evading questions about the desired size of the inflated balloon, whether to tie knots, etc. The trainer can smile and softly say something like, "Good question!" Soon it becomes obvious that some will participate in the exercise and some will not.

6-10 minutes

The trainer turns to the second flipchart page or overhead sheet that summarizes the results of the exercise and applies them to "real life" situations in organizations.

THE EXERCISE

This balloon exercise, where participants are given balloons to inflate, is simple and fun to do. Typically, this assignment leads to inflated balloons of varying sizes. After inflating them, most participants tie the balloon closed which is not part of the assignment. Some will let the balloons fly away or make them explode. Some participants don't inflate their balloons because they consider the assignment childish or because they can't.

When the exercise is over, the trainer explains that the assignment to inflate a balloon is simple compared to what a national organization may ask local chapters to do to implement new organizational procedures. Even if local chapters agree with the proposals, the exercise is meant to show how written directives for change are, or are not, carried out.

The results, applied to real life situations, should be summarized and shown to the group on an overhead sheet or flipchart page at the end of the exercise.

THE RESULTS OF THE TRAINING DESIGN

Uninflated balloons

These individuals/local chapters can't or don't want to carry out the change requested by the national organization. They may represent 10 to 20 percent of those asked to implement change. Maybe they didn't open the mail on time. Maybe they don't agree with the instructions sent to them by the headquarters office. Although we don't know why, in these groups change doesn't take place at all. The trainer should make clear to those who have not inflated their balloons that while some chapters don't participate on purpose, most have their own "good" reasons for not participating.

Inflated balloons of different sizes

Balloons blown up to different sizes illustrate that the results in each chapter will differ. Instructions from headquarters may not have been clear. Perhaps there was no guidance on how to proceed.

Balloons tied closed

These enthusiastic individuals/chapters add to and alter the assignment. They think there is something missing in the instructions and add ideas of their own. Often this is not a problem, but it can lead to more differences among local chapters than expected or wanted.

Released or exploded balloons

These chapters/individuals attempted change but fell back into old habits. They just found it too difficult to accept (hold on to) the new way. Even if nobody in the group let a balloon fly away or explode, explain the point.

In the unlikely event the trainer does not have enough balloons, the situation can be humorously incorporated into the exercise to help group members identify with the problems faced by individuals of good will when they try—and fail—to make things turn out as expected. In this case, the trainer can "represent" the

national headquarters office. The office thought it had correct addresses for all chapters, but obviously didn't.

The exercise completed, and the results applied to real life situations, the trainer now moves on to the substance of the session and starts discussing organizational development or other topics relevant to the exercise.

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