Organization
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Organization Development Review

JOURNAL OF THE ORGANIZATION DEVELOPMENT NETWORK

In the Midst of Change

Organization Development Review

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From the Editor

In the Midst of Change

Welcome to our 3rd issue for 2020. What a year it has been! Almost everything we know and understand has had some disruption or is drastically changing. And many in OD are working hard helping people and organizations navigate transformations and completely new creations.

This changing context has also interfered with the operation of our Journal. Submissions have been more limited, review processes have been inconsistent, as have revision processes, and we have all been distracted too often. I am sorry for the uneven publication of issues this year. We are working on many strategies, structures, processes, relationships, roles, responsibilities, and operational expectations to improve how the *OD Review* runs. More on that later.

Judith Katz, **Ph.D.**, has been part of our Board as long as I can remember and is now retiring from the Journal. As of 9/30 she has completed her last review for us. THANK YOU JUDITH! Judith was always one of the best we have experienced and over the years she has helped many others in our paired review process. We will miss her and honor her service in making this Journal one of the best!

New Board Members

In this issue, we will begin introducing our newest Board Members and will continue until our latest additions have been properly introduced. Some will replace people who have left over time and others will expand and balance our perspectives, experiences, demographics, and generations. Some new members will still be added into 2021.

Former Editors

Larry Porter	1973–1981
Raymond Weil	1982–1984
Don & Dixie Van Eynde	1985–1988
David Noer	1989–1992
Celeste Coruzzi	1993–1995
David Nicoll	1996–2000
Marilyn E. Blair	2000–2008
John D. Vogelsang	2009–2019

Following our new member introductions, we will begin introducing and thanking our existing Board Members, many who have been involved over decades. These will appear in our issues over 2021.

New Editorial Structure

We are also introducing our first Associate Editors to help as we improve how we function, expand the Journal's outreach and reputation, help to grow submissions and work with Board members and others to bring our best ideas forward and provide the Journal that helps OD as a field and valuable impact in how we live and work.

Please welcome **Lisa Meyer**, **Marc Sokol**, and **Norm Jones**!

New Submission Guidelines

Since the change of name, a couple years ago, we have not clarified much about who we want to be, our purpose and charter, so that is part of our update. Additionally, we need to assist authors with clear guidelines of what we publish and how submissions should be offered and what we won't publish. Some members of the Board and the new Associate Editors have helped in shaping this version being published in this issue. It will also be updated on the OD Network website under Publications.

Some Plans for the Future

I have spent many years on the Review Board and with 4 different Editors, starting in about 1993. There have been various initiatives along the way, but I am aware of some agendas we have kicked around a bit, but still need to work on. A few of the tasks we will look for help from our Board and other resources include:

» ODR in more University Libraries
» ODR with a larger, global readership
» ODR indexed, citation tracked and raised in reputation and usage
» Issue and article download sale options
» Bundling from our extensive and historic archives to create readers on valuable topics
» Rethinking what awards are offered from the Journal

Overview of the Issue

Mee-Yan Cheung-Judge has provided us with a new encapsulation of our field's work on competencies and how and why it has stayed a challenge. And in her hopes for our field has suggested some new directions for refreshing and pursuing less debate about all the 'whats' and a different process forward. This is a central topic for the professionalism of our field and is worthy of our attention and especially our next generations.

To add other perspectives and thinking to her comprehensive start, we invited a variety of people in our field and received 7 responses to enhance our thinking. You can communicate with the author and responders and can also send any comments to me at *editor@odnetwork.org*.

Debra Orr and **Mark Seter** tackle workplace bullying as a costly and psychologically devastating human system issue. With an extensive background and literature basis, they create greater clarity of the phenomena involved and draw on some OD to provide options to assist or resolve the debilitating aftermath. This article provides a look into a difficult problem for which OD thinking and skills cam help.

Bob Gulick and **Leslie Yerkes** have written about a case with a non-profit that made good use of Appreciative Inquiry. They discuss the lead up and preparation steps, followed by how the stages of AI took place and what happened. The consultant in the case adds some reflective thoughts at the end. Articles like this can be helpful for learning what goes into our work and some of the choices that need to be made.

Bruce Greenbaum, **Abraham (Rami) Shani**, and **Roberto Verganti** have shared some new thinking on an approach to transformation called Radical Circles. They draw on their research and practice with examples and findings. It's an alternative to our history of top-down everything. This process starts with employees and works through a common sequence of stages until it attracts some leadership support and resources and begins real transformation.

Julian Allen, Sachin Jain, and Allan Church have provided some new thinking on how surveys, and particularly pulse surveys, can inform change and help set strategic direction. The current context, driving more rapid needs, also weighed into their thinking. This article helps learning by holding true to evidence-based, data-driven change with some modifications to typical large-scale surveys that is often untimely or not integrated well with organization strategic directions.

And from our wonderful archives, we've included a few articles with some timeliness for today. The first three shorter pieces came from a 2008 issue and were part of a section called "Trends We Must Not Ignore." Peter Block kicks it off with "Nothing is New" where he outlines some key global trends and OD trends that respond. Of course, these are still or more relevant today. Fred Miller adds insight with "A Need to Connect" in which he discusses how critical it is to connect and the types of 'walls' that get in the way. Then, Maya Townsend, Barbara Christian, Jo-Ann Hague, Deb Peck, Michael Ray,

and Bauback Yeganeh tell us about "OD Gets Wired." They write about three facts of life in the wired world: (1) People are radically connected, (2) Collaboration trumps control, and (3) We live in complex and constantly changing ecosystems.

The next archives come from 2013. Loni Davis shares work from her dissertation data on "Mobile Work Practices, Blurring Boundaries and Implications for OD." In this article, she talks about work not being spatially and temporally bounded, how employees and managers began decoupling work and place, as well as, when, and new work norms and tensions developing.

Finally, we have selected one from the late Lisa Kimball entitled "A Powerful Distinction: How the Simple–Complicated–Complex Continuum Contributes to OD Practice." Lisa was long one of the best in our field on complexity science and its implications for OD. In this article, she discusses the continuum from simple to complex and its usefulness in OD for change, communications and culture.

In the **Case Study** section for this issue **Therese Yaeger** and **Peter Sorenson** bring us a new and timely case on "A Call for Diversity at Palos Production." Along with the three practitioners providing responses and suggestions, they deal with the issue of creating a more diverse, inclusive, and equitable work environment.

Practicing OD
Editors: Stacey Heath, Deb Peters, and Rosalind Spigel

In the *Practicing OD* section for this issue, we have 3 articles. **Priya Vasudevan** contributes "Infusing OD Values in Talent Development and Succession Planning." **Lori Wieters, Kathy Wenzlau**, and **Lindsay Perez** discuss "The Power of a 360-Degree Program Evaluation for a Nonprofit Organization," and **Julian Chender** provides "The OD Salon: Building a Dialogic Container to Advance the Field through Social Connection."

David W. Jamieson, PhD
Editor-in-Chief
editor@odnetwork.org

Introducing New *OD Review* Board Members

In this section we will be introducing new Board members (3–5 in each issue) and follow with existing Board members in 2021. This initiative involves replacing some members who have chosen to leave the Board, broaden our representation demographically and globally, and balance our Board across experience, role, and generational categories.

Karen Goosen has spent the last ten years as an instructor both online and on-campus at Oklahoma Panhandle State University (OPSU). Here, she has served on numerous committees for both the School of Business and Technology and the General Education Program revising and creating assessment criteria for Oklahoma State Board of Regents as well as the Higher Learning Commission. She has also played an important role in Phi Beta Lambda, collectively, the largest student business organization in the world, serving as an advisor to students who have won or placed in the top three at state and national championships. She has served as an academic advisor, course designer, and subject matter expert in her field.

Karen has an MBA from Liberty University and is currently finishing up her doctoral degree at Colorado Technical University. Not only does she spend her time teaching at the collegiate level, she is also a high school Algebra and Entrepreneurship teacher. She is a married mother of four grown children and currently resides in Lake Worth, Florida.

Karen is excited to be a member of such a professional team of scholars. As new theories and research begin to emerge after a pandemic shut down the organization as we know it, she is hoping to see a paradigm shift within the discipline of organizational development from executive leadership to the employee. She anticipates staying busy reviewing new information as more and more up and coming practitioners submit their articles while the face of organizational development transforms before us all.

Preston Lindsay is an American organizational psychologist and professor and who specializes in antiracist organizational development and change management with more than 10 years of executive leadership in both the nonprofit and corporate sectors. Professor Lindsay is a professor of industrial-organizational psychology at the University of Maryland, College Park, and is on faculty at several other institutions. Lindsay's current research centers on human behavior and systems in the workplace.

His research takes a phenomenological and constructivist approach to examine how organizational trauma influences worker behavior and performance. Presently, Lindsay serves as President and CEO of The Lindsay Group Co. an organizational development consulting firm he founded which offers strategic planning facilitation to organizations of all types. Passionate about social justice and advocating for underserved and historically marginalized communities, he offers his organizational development expertise by chairing a few boards of community-based, social justice organizations.

Systemic oppression with organizations today is dynamic and ever changing. As practitioners of the art and science of organization development we must endeavor to address critical aspects of structural racism and oppression that represents the incorporation, accumulation, and sustainability of long-standing racialized practices reflected in organizational systems and management practices in the modern organization. It is my hope that the ODR prioritizes space for those antiracist voices that promote the use of OD practice for multiculturalism and the dismantling of systemic racism and oppression.

Anton Shufutinsky, PhD, DHSc, MSPH, is a former career military Officer with over 25 years of leadership, management, and organizational science experience in the military, corporate industry, consulting, and academia. He has worked extensively, in numerous capacities, in ships, shipyards, hospitals, operational units, research laboratories, manufacturing facilities, utility plants, aviation platforms, emergency response centers, construction sites, universities, and administrative offices.

Currently, Anton is a faculty member in the Department of Business and Change Leadership at Cabrini University where he teaches in the PhD program in organizational development and change and coordinates the MS in leadership program. His research and practice foci include leadership development, organizational design, diversity, equity & inclusion, sociotechnical systems, organizational research methods, neuroscience & leadership, and organizational safety culture. Additionally, Anton serves as Chief Experience and Innovation Officer at the Institute for Interdisciplinary Leadership Education and Development, consults in the OD space through his independent firm Changineering Global, and is active in NTL, ISODC, and ODN. He holds masters and doctoral degrees in public health

and a second doctorate—a PhD in Organizational Development from Cabrini University. Dr. Shufutinsky has over 30 peer-reviewed publications in the basic, social, and applied behavioral sciences, and is actively involved in numerous research, consulting, and book projects. He lives with his family in the Greater Philadelphia Area in Pennsylvania. He can be reached at *as4363@cabrini.edu* and at *DrAnton@i-ilead.com*.

With regards to his appointment to the Editorial Board of ODR, he remarked: "I feel humbled, honored, excited and eager to join the editorial board of *Organization Development Review*, a journal with a rich history of quality published works in OD. I look forward to the opportunity to participate in driving the next stage of the journal's continued evolution, with a hope for increased scholarship, research, and evidence-based knowledge development, and movement towards becoming an indexed globally pre-eminent applied behavioral science publication for OD professionals, academics, scholar-practitioners, and organizational leaders."

Corrie Voss is a behavioral scientist and professor who brings a rich mix of academic wisdom and corporate experience to her work. As an active scholar-practitioner, she uses an integrated approach that nurtures the interplay of

theory and practice. She specializes in Conscious Leadership and Conscious Capitalism, and how leaders and organizations can develop into more self-aware and healthier versions of themselves. In service of creating spaces that work for all, she promotes practices that elevate our organizational experiences—ultimately playing a role in shifting our measures of success. No longer solely about the bottom-line, our future measures of success will link financial health with long-term, whole organization vitality and sustainability.

Dr. Voss is a professor in the Master of Organization Development Program at Bowling Green State University. Her research uses a narrative approach to examine the impact of life experiences on executive leadership development; concentrating on the micro-behaviors and practices that promote incremental and transformational change, she explores how this growth can be a positive influence in the leader's relationships and the entire organizational system. Currently, she serves as Founder and Principal of CVD Consulting Group, where she partners with clients in service of creating healthier and happier organizational systems. She is passionate about how we educate the next generation of female scholars; from volunteering at her daughters' schools to mentoring Master and Doctoral students, she shares her love, time, and expertise in an effort to help women thrive in educational spaces. She is located in Ohio, USA.

"I hope that *ODR* becomes the journal known for its balanced integration of practice and scholarship. Becoming the journal that attracts both the art and science of OD can create an inclusive space where the many voices working to create healthy, effective, and sustainable organizational change are welcomed and encouraged."

Introducing *OD Review* Associate Editors

In our efforts to improve structures, processes, and operations of the OD Review, *our first change is to restructure our editorial team and process. These three experienced and accomplished members of our OD community have agreed to become our first Associate Editors. There are many roles they may take over time, but to begin they will help the Editor in managing reviews and revision processes, provide ongoing inputs to our decisions, guide some of our further development work to improve the Journal and its standing, and help in soliciting/outreach to enhance our submissions. Please welcome Norm, Lisa, and Marc.*

Norm Jones currently serves as Chief Equity and Inclusion Officer at Amherst College. In this role, he works with campus partners to advance practices and programs that foster diversity, inclusivity, and accessibility. He oversees the Office of Diversity, Equity, and Inclusion, which comprises the Office of Workforce Equity and Inclusive Leadership, two Faculty Equity and Inclusion Officers, and the Mellon Mays Undergraduate Fellowship Program.

Working with the dean of the faculty and the chief human resources officer, he plays a key role in recruiting and retaining diverse faculty and staff and ensures that the college is an active participant in national and international conversations around inclusive excellence, equity, and justice.

I'm incredibly excited about the future of the *Organization Development Review*. I'm excited about new ways of finding meaning in our shared work. The future of OD is beautifully "bound up" in a deeper appreciation for those who have come to love the field perhaps somewhat outside of what many would consider a typical trajectory—one that involves deep interface with the scholarship, consultant experience inside and/or outside of organizations, and a kind of parochial familiarity with those who have been identified as gatekeepers of archival histories. Most of this is important but we have come to a moment of reckoning. We must ask ourselves what's next? Who will lead? Who will learn? Who will write? Our shared communities require our expertise and our humanity.

I'm looking forward to exploring the prevailing issues of the day and the pragmatism of foundational research skills as an entry point to partnership with our diverse community of OD scholar-practitioners. This journal provides an impeccable platform for critical interrogation and scholarly inquiry. Our founding thought-leaders would be heartened to know that OD scholars are poised to influence positive change in support of a more informed and better-equipped society. Here's to change!

Lisa Meyer is an author and an independent advisor to for-profit and non-profit organizations undergoing change.

Change has been a constant throughout my professional career, most notably during my 15-year tenure at Carmichael Lynch Advertising in Minneapolis, where I rose from account executive to chief operating officer. While there, I interfaced with dozens of client organizations including USBank, Wells Fargo, Harley Davidson, United Health Group, Medtronic, 3M, Cargill and Target. I have also held a senior executive position at a large, diversified financial services organization, led a small high-tech business through multiple revolutions in digital technology, and helped to lead private fundraising efforts for the University of Minnesota that included reaching record-breaking endowments for scholarships.

I have often observed how a significant barrier to success for an organization can be the organization itself, and how organization culture, the ability to attract and retain talent, the capacity to work across teams, and organization design all impact

on business success. And I integrate systems thinking into my work, seeking greater alignment between organizational culture, business strategies, and performance incentives.

I formalized my long-held interest in improving organizations in 2014 when I began my pursuit of a doctorate degree in Organization Development from the University of St. Thomas in Minnesota. My dissertation, entitled *The Grand Challenge of Preparing OD Scholar Practitioners for Grand Challenges*, was completed in September 2018. Since that time, I have continued to pursue research and writing that advances my vision of organization development as a way of helping organizations create value through safe and equitable workplaces, creativity, innovation, and change.

This is a time for reflection and renewal in the field in organization development, and as an associate editor of *OD Review*, I hope to contribute to both. Through commentary and insights from experienced scholars and practitioners we hope to share wisdom from reflective practice, and through our developmental review process we hope to attract and nurture new voices in the field. The *OD Review* is one of only a few publishing outlets for scholars and practitioners of organization development and I consider it an honor to be a part of the future of this important journal.

Marc Sokol, PhD: I have a PhD in Industrial and Organizational Psychology; ten years ago I founded Sage Consulting Resources, focused on executive and organizational effectiveness. During the past 30 years I have worked in large and small firms, in the public and private sector, in both internal and external roles, and across 25 countries. I am the past executive editor of *People + Strategy*, on the editorial board of *Consulting Psychology Journal: Practice and Research*, and co-author of several books. I am also a fellow of both the Society for Industrial Organizational Psychology (SIOP) and the American Psychological Association (APA), and an advisor to a graduate program in I-O Psychology. Most recently I published the article, *Mindful design of the sole-practitioner consultancy*.

My hope for *OD Review* is that we continue to increase our focus on actionable content, share case studies and lessons of experience, and publish articles that inspire productive dialogue.

Organization Development Review

JOURNAL OF THE ORGANIZATION DEVELOPMENT NETWORK

Guidelines for Authors

Our Purpose

The *Organization Development Review* is a journal bringing together scholarly and practitioner perspectives to foster greater understanding, improved practice, new research, and innovations for critical issues in our fields. We focus on all processes of human organizing, such as small groups, organizations, networks & communities. Our scope is wide within the broad range of:

1) How human organizing systems develop, adapt, change, and transform.
2) How we lead more effectively and develop effective organizations.
3) How we create healthy workplaces and cultures that get the work done and leave people engaged, proud, and satisfied.
4) How we support all forms of diversity, equality, and inclusion in organizing and operating organizations, communities, and societies.
5) How we develop greater individual and organizational capabilities for our VUCA world.
6) How we develop greater creativity, innovation, and collaborative processes.
7) How we create a more humane and just society.
8) How we develop and innovate in the profession.
9) How we educate leaders and change agents, of all types, in the science and practices of values-based change and masterful practice.
10) Case studies that demonstrate the impact of OD and OD in collaboration with other fields of inquiry and practice.

We publish evidence-based practice, applied research, innovative ways to do this work, new developments in the fields, as well as, thought pieces, invitational pieces, cases, and relevant book reviews. We hope for wide participation across our fields, around the globe, across sectors & industries, and inclusive of all forms of diversities. We wish to generate more conversations and dialogues among our fields. We ask that all submissions reflect the OD Network values of respect, inclusion, collaboration, authenticity, self-awareness, and empowerment.

Expectations of Authors

All articles should:
» Clearly state the purpose of the article and its content
» Present ideas logically, with clear transitions
» Include section headings to help guide readers
» Use language that reflects inclusivity and is non-discriminatory in the context of the article
» Avoid jargon and overly formal expressions
» Reference sources used and provide source references for any theories, ideas, methods, models, and practices not created by the author(s)
» Conform to standard English usage (U.S. or U.K.) and be edited for spelling and grammar rules
» Avoid self-promotion
» Be useful in practice or provide implications for practitioners (leaders, change agents, etc.)
» For formatting guidelines, citations and references, follow the *American Psychological Association Publication Manual, 7th Edition* (2020)
» Submit as Word document, not pdf or email form; the document should contain short title and author name
» Contain short author bios *including contact email(s)* (up to 250 words)
» Graphics that enhance an article are encouraged. The *ODR* reserves the right to resize graphics when necessary. The graphics should be in a program that allows editing. We prefer graphics to match the *ODR*'s three-, two-, or one-column, half-page or full-page formats. If authors have questions or concerns about graphics or computer art, please contact the Editor.

We consider articles of varying lengths between 2000–5000 words. Contact the Editor with any questions, ideas or explorations (*editor@odnetwork.org*).

If the article is accepted for publication, the author will receive a PDF proof of the article for final approval before publication. At this stage the author may only fix errors in typesetting or minor changes to the text. After publication, the author will be sent a PDF of the final article and of the complete issue of *ODR* in which the article appears.

Guidelines for Authors (contd.)

Submission Deadlines

Authors should email articles to the editor at *editor@odnetwork.org*. ***Articles can be submitted at any time*** and if accepted, will be included in an appropriate upcoming issue. General deadlines for articles being targeted for quarterly issues are as follows:

Winter Issue (Jan-Mar): **October 1**
Spring Issue (Apr-June): **January 1**
Summer Issue (July-Sept): **April 1**
Fall Issue (Oct-Dec): **July 1**

The Review Processes

The *ODR* is a peer reviewed journal. Authors can choose between two review processes and should ***notify the Editor which they prefer when they submit a manuscript:***

Process 1 (open peer review): Submit with cover page including title, all authors, any acknowledgements, and a short abstract. Usually, two members of the *ODR* Editorial Board will review the article. They will recommend accepting the article for publication, pursuing publication after suggested changes, or rejecting the article. If they decide the article is publishable with changes, one or both of the editorial board members will email or call the primary author to discuss the suggested changes and serve as coaches in helping the author(s) prepare it for publication. Once the author(s) has made the changes to the satisfaction of the two editorial board members, it will be sent to the Editor for final determination. If it is now accepted, the *ODR* Editor will work with the authors to finalize the article for publication.

Process 2 (double blind peer review): This option is offered to meet the standards of many academic institutions. Submit articles with cover pages with the article's title, all authors' identifying and contact information, and brief biographies (100–250 words) for each of the authors; also include any acknowledgements. On a new page, provide an abbreviated title running head for the article. Do not include any author identifying information in the body of the article, other than on the initial title page. Two members of the editorial board will independently receive the article without the author's information and without knowing the identity of the other reviewer. Each reviewer will recommend accepting the article for publication, rejecting the article with explanation, or sending the article back to the author for revision and resubmittal. Recommendations for revision and resubmittal will include detailed feedback on what is required to make the article publishable. Each *ODR* Board member will send their recommendation to the *ODR* Editor. If the Editor asks the author to revise and resubmit, the Editor will send the article to both reviewers after the author has made the suggested changes. The two members of the editorial board will work with the author on any further changes, then send it to the *ODR* Editor for preparation for publication. The *ODR* Editor makes the final decision about whether the articles will be published.

Timing Considerations

» When initially submitted one should expect 4 weeks for review time, reviewer collaboration, and author feedback

» If reviewers/editor suggest revisions and resubmit, the article should be returned *within 4 weeks* (unless it is slated for an immediate issue in which case it should be returned *within 1–2 weeks*).

Other Publications

The *ODR* publishes **original articles**, not reprints from other publications or journals. Authors may re-publish materials first published in the *ODR* in another publication or webpage, as long as the publication gives credit to the *Organization Development Review* as the original place of publication.

Policy on Self-Promotion

Although publication in the *ODR* is a way of letting the OD community know about an author's work, and is therefore good publicity, the purpose of the *ODR* is to exchange ideas and information. Consequently, it is the policy of the OD Network to not accept articles that are primarily for the purpose of marketing or advertising an author's practice or promoting or selling anything.

"OD competencies are the characteristics that define successful performance by the OD professional. It delineates who ODPs need to be, what they need to know, and what they must be capable of doing."

Organisation Development Core Principles, Competency, and the Way Forward?

By Mee-Yan Cheung-Judge

One can never accuse the OD field of being uninterested in professional standards, professional competency, and practice, nor for that matter, in its future viability. Ever since 1952 when the first 7 competency items were identified by NTL (Benne), through to 2016 (the last comprehensive publication on OD competencies by Cady and Shoup), and up to 2018 (when Minahan reported on how ODN USA developed the Global OD competencies), there has been persistent interest among both academics and practitioners to identify what can, and should, constitute OD competence.

During this period, over 45 researchers and authors have made significant contributions to the study of OD competencies. This is a conservative estimate as many more have propagated the concept in formal or informal gatherings, spoken in conferences, or contributed in developing various professional network standards. (see *Table 1*)

In spite of these efforts, the field still does not have any agreement as to what constitutes competent OD practitioners (ODPs) nor how to apply them.

It is time to ask are there any alternative approaches that can steer the movement forward? For what reason?

Motivation Behind the Pursuit of OD Competencies

The case for resurrecting the competencies movement in the field currently is suffering because of the lack of consensus on this issue, and that current certificate/degree programmes are producing too

much diversity in skill sets or knowledge while the "important" areas are not being focused on.

When the field is not able to articulate the characteristics that define successful ODPs' performance and which also differentiates the ODPs from other helping professionals, and when there is not an agreed set of competencies as our professional standards, it is difficult to have a common yardstick to develop OD talent, to guide career development, and to pursue continuous development of the field (Minahan, 2018), and ultimately give robust quality assurance to the field. Back in 1977, Weisbord talked about how we should be able to tell the genuine item from an imitation.

The following four areas (see Worley, Rothwell and Sullivan, 2010) summed up the motivation for the field to pursue what is OD competence.

1. For the development of the OD field:
Like any field, OD needs to establish a clear identity of its professional practices which includes delineating its primary purposes, and how those purposes can be fulfilled by stipulating the type of knowledge and skills the practitioners need to demonstrate.

2. To aid the design of OD curriculum:
To guide academic institutions and developers to know what sort of curricula are needed to educate and develop practitioners at different levels, as well as to guide those institutions who grant accreditation to OD academic and organizational programmes.

3. For the individual ODPs:
To inform newcomers to the field what is required for effective practice, and to offer continuous guidance to practitioners on what they need to do to become masterful, and which academic and development programmes will help them achieve their career goals.

4. For organisations who employ OD professionals:
To provide those organisations who hire both internal ODPs and external OD contractors a clear set of OD competencies that will support their processes of selection, recruitment, deployment, appraisal, and development.

Outline of the Article

»   What is the definition of competence?
»   A review of previous efforts in establishing OD competence.
»   What may be the reasons behind why there is still not an agreed set of OD competencies?
»   What insights have we gained that will help us shape an alternative way forward?
»   What are the characteristics of an alternative way forward?
»   Who will be the key players in the alternative approach?
»   Sample list of first practical steps to kick-start this alternative approach.
»   How long will the implementation plan take place? A sample time scale.

What is the definition of competence?
The following three definitions offers the gist of what OD competence is about:
1.   "An OD competency is any personal quality that contributes to successful consulting performance. The term personality quality is to embrace areas of "self" including values, and driving principles, areas of knowledge, including fluency with relevant theories and models, areas of skills and abilities, including the requisite behaviour capacity to perform our work successfully." (Lippitt and Lippitt, 1978)
2.   "Competency is an underlying characteristic of an employee (motive, traits,

skills, aspects of one's self image, social role, or body of knowledge). Hence, competency is associated with an individual's characteristics in performing work and includes anything that leads to successful performance and results." (Boyatzis, 1982)
3.   "A well written competency statement proposes and provides an operational definition that makes the desirable behaviour more accessible to the readers, particularly those required to exhibit, assess and develop that competency. It is a clear description of KSA (knowledge, skills, ability) + attitude. The greater granularity, the more understandable and accessible it will be." (Cady and Shoup, 2016)

Summing up, OD competencies are the characteristics that define successful performance by the OD professional. It delineates who ODPs need to be, what they need to know, and what they must be capable of doing. It is a detailed description of an ideal performer.

A review of the previous efforts in establishing OD competence.
Many efforts have been made to review the OD competencies journey since the 1950s. *Table 1* lists such extensive (not exhaustive) work in chronological order.

What *Table 1* shows is that the journey began with the 7 items from Benne of NTL, increased to the 83 items in twelve categories generated by a group of OD

Table 1. *History of Who has Worked On and Published OD Competencies*

Year	Authors	Name of the Articles/Books
1950s	Benne, K.	At NTL come up with a seven-item skill list for ODP.
1973	Partin, J.J.	Current Perspective in Organisation Development.
1974	Sullivan, R.	"Change Agent skills."
1978	Lippitt, G. & Lippitt, R.	The Consulting Process in Action.
1979	Warrick, D.D.; Donovan, M.	"Surveying Organisation Development Skills."
1980	Varney, G.	"Developing OD Competencies."
1981	Shepard, K; Raia, A.	"The OD Training Challenge."
1984	McDermott, L. C.	"The Many Faces of the OD Professional."
1984	Neilson, E. H.	Organisation Change.
1990	Bushe, G.R; Gibbs, B.W.	"Predicting Organisation Development Consulting Competence from the Myers-Briggs type Indicator and Stage of Ego Development."
1990	Eubanks, J.L: O'Driscoll, M.C.; Hagward, G.B. and Daniels, J.A.	"Behavioural Competency Required for Organisation Development Consultants."
1990	Marshall, J, Eubanks, J.	"A Competency Model for ODPs."
1992	McLean, G.; Sullivan, R.	"Essential Competencies for Internal and External OD Consultants."
1992–2005	Sullivan, R., and others	Annually "Competencies for Practicing Organisation Development." The International registry of organisation development professionals and organisation development handbook.

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Year	Authors	Name of the Articles/Books
1993	O'Driscoll, M.P.; Eubanks, J.L.	"Behavioral Competencies, Goal Setting and ODP Effectiveness."
1994	Church, A.H; Burke, W.W.; VanEynde, D.	"Values, Motives and Interventions of Organisation Development Practitioners."
1994	Head, T.C.; Sorensen, P.F.; Armstrong, T.; Preston, J.C.	"The Tale of Graduate Education in Becoming a Competent Organisation Development Professional."
1996	Church, A.H; Waclowski, J.; and Burke W.W.	"ODPs as Facilitators of Change: An Analysis of Survey Results."
1998	Worley, C.; Varney, G.	"A Search for a Common Body of Knowledge for Master's Level Organisation Development and Change Programmes: An Invitation to Join the Discussion."
1999	Weidner, C.; Kulick, O.	"The Professionalization of Organisation Development: A Status Report and Look to the Future."
2001	Church, A.H.	"The Professionalization of Organisation Development: The Next Step in an Evolving Field."
2001	Sullivan, R.; Rothwell, W.; Worley, C.	"20th Edition of the Organisation Change and Development Competency Effort."
2003	Worley, C.; Feyerherm, A.	"Reflections on the Future of Organisation Development."
2004	Davis P., Naughton, J. and Rothwell, W.	New Roles and New Competencies for the Profession.
2004	Davis, P., Naughton, J., Rothwell, W., and Wellins, R.	"Mapping the Future: Shaping New Workplace Learning and Performance Competencies.
2010	Worley, C.; Rothwell, W.; and Sullivan, R.	"Competencies of ODPs."
2015	Eggers, M.,Church, A.	"Principles of OD Practice."
2015	Worley, C., Mohrman, S.	"A New View of Organisation Development and Change Competencies—the Engage and Learn Model."
2016	Cady, S. and Shoup, Z.	"Competencies for Success."
2016	OD Network, USA	Unveils the Global OD Competency Framework at its Annual Conference in Atlanta.
2018	Minahan, M.	Finally! Global OD Competencies.

experts and documented by Shepard and Raia (1981), reduced to a list of 67 "entry level" competencies in four categories by Varney (1988); and to 28 OD competencies from the guidance of early founders of the field, Worley and Feyerherm (2003). The Worley, Rothwell and Sullivan research (2010) produced 23 items but with 69 representative items attached to them. There was an undifferentiated long list of over a hundred items in the Rothwell and Sullivan textbook. *Appendix 1* pulled together most of the items (120) from the authors above (adapted from Worley, Rothwell, and Sullivan, 2010). The ODN Global OD competencies have 5 dimensions, and 3 layers of description. The various lists above are not all that different, the question is how these should be used to generate competencies and their impact.

To sum up this review: (a) the field is not short of CONTENT and the various listings are not that different. While there is no consensus, there are broad agreement; (b) many colleagues in the field show great interest in establishing OD competencies but there is no agreement on how these should be used to generate what impact;

and (c) it will not be productive to focus on the WHAT? The focus now needs to be on the HOW—how to put the lists to work to create the impact the field needs.

What may be the reasons behind why there is still not an agreed set of OD competence?

The following reasons are highlighted to help us understand as well as learn why the field still struggles to have a coherent framework for OD competencies.

1. **The field is too diverse and has many specialisations.** As an applied behavioural science field, OD is vast and diverse, both in specialisms as well as in the different levels of system work (see *Table 2* on next page for a sample list of OD specialisms and Levels of System work). Hence it is difficult to have one agreed set of competence for everyone. For example, what is useful depends on whether one is specializing in intrapersonal work (e.g. coaching) or focused on groups (e.g. group dynamic specialists doing team building, or conflict resolution), or concentrating on large scale big system change. Given this situation, the decision is whether there should be CORE areas that all ODPs should aim to be competent in on top of their specialism?

2. **Inability to manage the tension of the polarity between developmental focus or certification focus.** Among the OD community, there is tension in whether competency should be used as a developmental framework to guide individual practitioners towards mastery, or as a set of "standards" to certify practitioners in order to deem them competent to practice or not—as part of the quality assurance process. It is our inability to resolve this tension that held us up in the competence movement.

3. **Our professional associations do not have the mandate to be a quality assurance body.** In the field of OD, our professional organisations are not set up as other professions, e.g., Marketing, Accountancy or Engineering, which have been mandated by outside regulatory bodies and their own professional membership to progress and

Table 2: *Sample List of Types of OD Specialism, Level of System, Scale/Size of Work, Sector Specialism.*

Types of OD Specialism	Level of System Work	Scale and Size of Work	Sector Specialism
1. Coaching	1. Global scenario	1. Macro total system change/transformation programme—2–4 years duration—with multiple variables focus	1. Energy sector
2. Facilitating	2. Pan regional level work		2. Medical sector
3. Group process consultation	3. Nation state level work		3. Bio-science sector
4. Team building	4. Societal work		4. Engineer sector
5. Conflict resolution – group and individual	5. Community work	2. Total single organisation transformation change programme—18 months, with multiple variables focus	5. Pharma and vaccine sector
6. Group dynamic specialist	6. Inter-communities work		6. Consumer health sector
7. General consultancy work – OD cycle work	7. Whole system organisation work		7. Professional services sector
8. Merger and Acquisition	8. Inter-whole system organisation work	3. Short term turnaround project with limited variables focus	8. Professional institution sector
9. De-merging	9. Organisation and sub-system work		9. Academic sector
10. Organisation design	10. Sub-system work	4. Short term team building and maintenance work	10. Financial service sector
11. Service improvement	11. Inter-sub-system work		11. Retail sector
12. Strategic planning and implementation.	12. Group work	5. Small scale business improvement project	12. Charity sector
13. Organisation health check	13. Intra-group work		13. Developmental agencies
14. Organisation review	14. Inter-group work	6. Build corresponding OD plan to the strategic plan—annual cycle	14. Start up
15. Evaluation of organisation effectiveness	15. Triad and dyad work		15. Private equity
16. Diversity, Equity and Inclusion work	16. Interpersonal work	7. Trouble shoot job—variables unknown	16. Legal sector.
17. OD planning work	17. Intrapersonal work		
18. Staff survey specialist		8. Single assignment—one off review	
19. Culture change specialist			
20. Big system change work			
21. Large group work			
22. Operational process improvement work			
23. Quality improvement work			
24. Safety process improvement work			
25. System capability building programme			
26. Talent management			
27. Leadership development			

maintain professional quality. Without such formal mandate/legitimacy, our professional associations simply do not have the power to impose a "standard" set of competencies on its members. On the one hand, this provides a luxurious degree of freedom for ODPs to undertake continuous experimentation with fresh methods and novel tools, yet makes keeping track of the development of the field both challenging and confusing.

4. **The global spread of the field and its inherent diversity.** The main thrust of the OD field began in USA, and in a relatively short period has travelled widely to many places in the world, e.g., New Zealand, Australia, Mexico, Philippines, South Africa, Canada, South East Asia, Korea, various countries in Europe, UK, etc. This movement has been incredibly exciting as the early founders' work was combined with other global community efforts in applied behavioural science yielding

an even richer interpretation of human behaviour with cross-cultural lenses. The unintended consequences of the spread is vastly different types of practice and interpretations of what OD is, and is not, what is good OD and what is not. As many know OD competencies constructed in one socio-political-cultural context may not be applicable in another context.

5. **Specialism rather than the wholistic integrity of the field takes central stage.** Most OD practitioners tend to

have stronger loyalty to their own sub-specialisation rather than to the integrity of the field as a whole. The lack of loyalty to the "whole" field affects (a) our inclination to collaborate, and (b) our willingness to engage in constructive dialogue to figure out what is core to bind us together, where are we truly different, and how should we live with both. Worley and colleagues (Worley, Rhodes, Feyerherm, 2020) have recently written a sharp critique on how the fragmentation of the field into diverse specialities has compromised the integrity of OD as a system-wide application as OD was meant to be an integrated, end-to-end, development experience leading to learning, improved capacity for change, and increased effectiveness.

6. **Unwillingness to work with the creative side of conflict.** Most practitioners are aware that an externally imposed certification route will be a treacherous one because there will be disagreement as to: (a) who has the right to set the definitive standard, (b) who has the power/authority to decide what "credible and trustworthy" institutions should act as "assessment centres," and (c) who will be "heavy weight" enough to staff them—i.e. who will be qualified to vet other practitioners? The off balance between diversity in practice and loyalty to the integrity of the field has been so out of kilter that prevents us from building coherency, and we are "stuck."

What insights help shape our thinking on an alternative way forward?
The insights from two sets of conceptual frameworks: Polarity Management and core OD intervention values and practice principles gave us some insights as to how to unstick this situation.

In trying to understand where the tension lay, the following polarity pairs have been mapped that will need managing if we are to find a way to implement any OD competencies standards.

Tightly bounded	Loosely bounded
Externally enforced	Internally induced
Prescribed processes	Flexible processes
Institution led	Individual led
External quality assurance	Internal quality assurance
Single source quality assurance	Multiple sources of quality assurance
Focus on standardization	Focus on continuous learning
Outside certification process	Self-assessment process
Imposed Field standard OD competence profile	Self-constructed individualised OD competence profile
Single agency led	Multiple agencies partnership

To unlock the tension of the above polarities, we will need to design a way forward balancing both poles.

We also set up questions from the OD intervention criteria to offer us some insights in *Table 3* (next page).

The answers emerge from answering those intervention questions give us ideas on how to unlock the immobilised tensions from these polarities. The following proposals are set up as catalyst to evoke further ideas from colleagues who want to get this OD competence movement going.

What are the characteristics of an alternative way forward in OD competencies?

1. **There will be ONE CORE set of OD competence for all.** Regardless of what speciality ODPs have, all ODPs need a core set of competencies. At the risk of generating more heat than light, I put out a sample of OD core competencies to evoke a genuine dialogue among readers as to what they personally think should be in this core set. See *Table 4* (page 17) for a sample core competence (not a definitive proposal).

2. **There will also be a menu of other OD competencies available to help ODPs build up their mastery according to their specialty.** As mentioned, it is neither realistic nor useful to have ONE

COMPREHENSIVE set of OD competencies that all ODPs needs to have in their possession. Instead, on top of the CORE set of OD competencies, there will be a comprehensive competence menu constructed based on all the previous work done, and will be organised under specialist areas. The end product will be held electronically in OD professional organisations where individual practitioners can gain access to construct their personalised competence based on their OD specialism at their preferred LEVEL OF SYSTEM work.

3. **The primary purpose of the use of the OD competence will, in the first 3–5 years, be on a developmental focus vs standardisation focus.** For the first phase of the movement, OD competencies should not be used in a "certifying" way. Instead, all ODPs are encouraged to experiment with building their personalised OD competence profile, getting used to working with their competence profile, not as a yardstick to evaluate their capability, but mainly as a developmental framework—guiding their own self-assessment, their development path, charting their own career path, and bringing their developmental goals into focus.

4. **Practitioner-centric.** The above processes describe a practitioner-centric approach—putting emphasis on the process of taking up of the OD competence will be initiated and managed by the practitioner personally. ODPs are the ones who will drive their time line as to when they are ready to begin their OD competence journey, how they will construct their own competency profile, choose what development activities they will undertake, identify what type of support they will need, and determine when they are ready to undertake a more formalized self-assessment process.

5. **OD competence movement should be backed by strong organisational infrastructural support.** All the infrastructure to accompany the individual practitioner's OD competence journey will be supplied in the first phase by OD professional organisations and later

Table 3: *Intervention Questions for Implementing OD Competencies*

Intervention Questions:	Possible Answers:
1. Who are the primary targeted populations that need to own and use the competencies, and for what reasons?	Individual ODPs and their community – for their development
2. Whose readiness and capability will we need to focus on building so that they can take the lead in using the OD competence frameworks?	Individual ODPs and OD professional associations
3. Who are the holders and containers to support this OD competence project, especially when the targeted population is widely distributed?	OD professional associations and other related institutes globally
4. How many levels of system work will we need to engage in to ensure the transformation will happen at the systemic, group, and individual level?	Individual, groups, community, organisations, and inter-organisations
5. What systemic partnership will we need to build in order to secure the sustainability of this OD competencies uptake?	Minimally, the OD professional organisations, education institutions, and other OD development providers
6. To create a healthy momentum of this intervention, how many "entry points" will we need to make to create movement?	Minimally, 3 key entry points. Getting individual ODPs who want to develop their trade, to get academic and OD education providers who want to provide appropriate development programme for the ODP, and OD professional organisations who will host and market the competencies
7. What OD values do we need to evoke so that a sustainable result will come from those values?	• Client-centric • Using group dynamics to build ownership • Life-long learning and development ethos being in action
8. What supportive networks will we need to provide for the early adopters to maintain momentum?	• Clear support to individual ODPs through advisors/coaches from professional associations – hence relationship-centric
9. What type of group relationship will we need to build across multiple units to secure intervention goals?	• The importance of the interdependence different partners have on each other, but with role clarity
10. How to attain quality assurance without needing external enforcement?	• Build and grow strong self-induced standards to eventual acceptance of "certified standards"

by academic programmes in universities and other OD key institutions—(see their roles in next section).

6. **The journey will be relationship-rich—each ODP will have a supportive journey mate(s).** It is envisaged that the practitioner's competence journey will be accompanied by an official advisor/

coach who is someone with deep experience in OD and has completed their OD Competence journey. These advisors/coaches will be recruited and trained by the OD professional organisations to play a formal role to support any of the practitioners who come

to the OD professional organisations to undertake the journey.

7. **There will be no external validation via certification in the first 3–5 years.** Instead of having an external certification process, individual ODPs will be encouraged, when they are ready, to undertake a self-assessment process with the support of a developmental panel who will be provided by professional associations. The purpose of that is to ensure it is the individual ODP who will drive their timing on when they want to be assessed against their own constructed competence profile.

8. **Quality assurance will come from multiple agencies partnership.** During the first 3–5 years, the quality assurance processes will be jointly owned by (a) high quality OD education and development programmes; (b) through the quality of advisors for the individual practitioners to map their OD competence profile and developmental steps; (c) through the self-assessment panel; and (d) through the individual practitioners who own their own developmental journey.

Who will be the key players in the proposed alternative approach?

The role of the professional association. In this alternative approach, OD professional organisations will play a critical and primary role to:

» Set up both the CORE and Comprehensive OD competencies menu in a robust consultation process.
» Set up the process map for individuals who would like to construct their personalised competence profile.
» Set up the process map for those organisations who will be in partnership with them in supporting this OD competence movement. For example, academic institutions, private OD consultancy firms or individual experienced ODP who wants to become "formal" advisor/coach to individual ODP.
» Be responsible to disseminate the competencies menu—show practitioners, academic institutions, and

Table 4: *Sample List of OD Core Competencies (for Open Dialogue and Co-construction)*

Core competencies: Sub-areas	Possible Answers:
1. Well trained in Applied behavioural sciences	• Have clear understanding of human behaviour • Well versed in various theoretical frameworks in diagnosis and design of intervention based on deep insights of human behaviours and needs • Understanding and curiosity about how to work with diverse human dynamics
2. Conceptual competencies on how organisation works	• Understand how organisation works • Ability to see the systemic picture • Ability to do diagnosis and able to handle the data to draw insights to design intervention • Know how to link data with intervention strategy with evaluation
3. Strong group processes skills	• Fluent in group dynamics, know how group works • Able to do process consultation • Able to do facilitation • Able to work with groups in diverse range of situation
4. Consultancy and process skills	• Understand the OD consultancy cycle • Ability to go through from contracting to diagnosis, to design intervention, to execute intervention to carry out evaluation which leads to exit • Able to handle various types of stakeholders through this consultancy cycle while continue to increase engagement among most people to the change issues
5. Use of self	• Clear knowledge of who they are • Having a grounded sense of self, not driven by need for other people's approval • Adequate self-esteem and self confidence • High awareness of the impact of self on others • Commitment to take building positive relationship as their top practice work • Have a clear sense about who they are and how they work • Willingness to work on our unresolved issues
6. Change competency	• Savvy in knowing how to work with planned and emergent changes • Understand the human dynamic and psychological matters in change • Savvy in the OD approach to change • A working knowledge of complex change and know-how to support clients to navigate through the change
7. Ethics and value	• A clear sense of their own values and ethics and how to translate them into practice • Subscribe to OD values • Having clear ethical standard • Strong commitment to equality, equity, diversity, and social justice • Know how to translate value to consultancy behaviour and conduct
8. Specialism skills and knowledge	• Develop their specialism and level of system work • Get to be progressively masterful in their specialism • Able to work across a number of specialism areas to secure synergy to work on complex cases

Another way to express these core competencies are in these 8 domains:

1. Relationship with self (use of self)
2. Relationship with people (applied behaviour sciences)
3. General knowledge on how organisation works
4. Group savviness (strong group process skills)
5. General consultancy skills (general consultancy and process skills)
6. General change skills (change skills)
7. Ethics and values
8. Specialisation areas.

private developers what they are, what they mean, how to navigate the menu and the application processes—if they decide to be part of the professional constellation for propagating the OD competencies up take.

» Play a critical role in encouraging practitioners to begin their OD competence journey and coming alongside to support them in undertaking this exercise. Make the "right to use" of the OD Competencies menu a part of the membership fee.

» Train up advisors/coaches to guide the individual practitioners to set up the tailor-made competencies profile, identify developmental steps, as well as to support their applications. All recruited advisors/coaches once trained, will register themselves as official advisors.

» Set up self-assessment processes as well as who can be serving as panel members (again with members of the self-assessment panel being trained and understand how to support the practitioners to undertake this journey).

» They will also be working together with willing educational institutions and developing agencies to discuss the role of educational and development providers in designing curriculum to match the OD competence menu.

In playing the above role, they inadvertently become the holder of the OD quality of practice.

The role of educational institutions.
All OD educational and development providers will be introduced to the OD Core and comprehensive competency menu to review the strength of their current offerings. As a result, they may choose to strengthen their existing offerings and/or design new OD development programmes to meet the developmental requirement from the OD competence menu.

It is important that this is done from the perspective of the whole OD system and not from a competitive stance. Each institution, based on their expertise, specialisms and geographical location, will attract different ODPs who seek different types of development. Eventually, the

specialised offering to practitioners from each institution will be put on an OD educational map as the RIGHT PLACE for the practitioners to pursue that unique type of development.

By doing this, the qualification or continuous education certificate programme becomes, by intent, a key aspect of quality assurance for the area of specialism.

Individual OD consultancy and training firms.
Smaller OD consultancy and development firms are also being encouraged to find out what unique offerings they can provide for individual practitioners. Once they are accepted, their offerings can be mapped against specific competence as the "go to" places for individual practitioners for development.

Their staff may also become advisors with the professional associations and educational institutions after being trained.

Experienced individual ODPs.
They can apply to be "formal" advisor/coaches with the OD professional organisations for the individual practitioners who need support when they start their OD competence journey. Their roles include (a) knowing how both the Core and the Comprehensive menu work, so that they can help the individual practitioner navigate through the menu to come up with their personalised profile; (b) hold regular review with the individual ODP and to update the competence profile; (c) to guide the ODP on the self-assessment process; and (d) apply to sit on self-assessment panel.

A **sample** steps of action are listed below to show how this alternative approach can be implemented.

1. In order to get this OD competence project going, it is suggested that 2–3 OD institutions and/or OD professional associations get together, agree with each other their role in undertaking this task, seek funding to support the project and begin to do the mapping job. They *should not seek permission from the*

collective community, they should just step up and do it by being willing to invest time and resources to get the job done with best intentions for OD.

2. In this early phase, the professional associations need to focus on three tasks: 1) to establish the OD competencies menu (both core and specialities based competence) and to undertake the consultation exercise; 2) to build partnership with academic and development institutions; and 3) to recruit and train experienced ODPs to be advisors to support practitioners.

3. When the consultation of OD competency (both CORE and comprehensive menu) is done, a major trial period should start (10–18 months?). To begin with, all ODPs who are members of the professional associations will be invited to take part in the trial, and non-members can request to join also. They will be supported in distinguishing what competencies they need, what they have or not have, and identify ways to help them close the gaps. The outcome from this phase is that over 60% of participating members will have completed their individually tailor-made competence profile, a development plan.

How long will the implementation plan take? A sample time scale.
The following **sample time scale** shows that it will not be a short game to play. But given it took close to 70 years of hard work to get to where we are now, this time we will need to go slow to go fast. Below is an estimated timeline for the launching of OD competencies.

1.	Get collaboration across 2–3 OD institutions and professional organisation and to agree the project tasks	3–6 months
2.	Set up the OD comprehensive competence menu and put them on electronic platform ready for consultation	6–9 months

3.	Consultation feedback and revision of the menu. During this period 2 things need to happen: (1) advisors and coaches are recruited, trained, and asked to trial the competence menu themselves even when the final version is not done yet; (2) work with academic institutions and private developers about reviewing their offerings against the OD competence menu	2–4 months
4.	Ready to launch the OD competence journey in different locations; set up a feedback and trouble-shooting forum to continue to keep this journey running smoothly	1 year or 1.5 years from the beginning of the project
5.	Set up a number of review criteria and begin to market the results to other ODNs globally	Whenever

Summary

Before closing, for those who are interested to rekindle this OD competence movement to advance the field, further reassurance on two more areas may be helpful:

Can this practitioner-led process quality assure our standards? The answer is yes, but it will require 3 things: (1) the successful uptake of individual OD competence profiles in different geographic areas; (2) sufficient professional associations and other OD institutions around the globe playing their part in offering quality advise and coaching as well as running the self-assessment process; (3) collaboration between OD education and development providers to offer high quality programmes for ODP. I also believe the certification process will be a natural outcome 3–5 years down the line when most ODPs get used to own their own competence profile, use the profile to guide their development work, and use it to self-assess where they are in terms of their mastery.

How are we going to finance this journey? I believe setting up the competence work will depend on a partnership funding approach. Each professional organisation will contribute to different aspects of this start-up process. Private funding can also be solicited. Once that is set up, all the services that the OD professional organisations offer in relationship to this OD competence project—from gaining access to the OD competence menu, to the offering of advisors/coaches, to the regular review meetings should be financially self-sustainable. For example, x% of the membership fee should be budgeted to pay for these services, or for non-members, there will be a chargeable fee. The rate in the first 3 years should be low enough to be accessible to all. As for the self-assessment process, the professional associations who house that service should charge the ODPs to cover the cost. We are recommending all practitioners should learn to put aside 7–10% of their income for their own development annually. When professional organisations are doing their job well, we expect numbers of memberships will increase and other extra services will help to steady the income stream.

Final Remark

In this article I have looked at the OD Competence journey in the field, assessed what may be the reasons why we still do not have a coherent approach to OD competencies, revisited the reasons why we should not give up this journey, and actually explored an alternative proposal based on key OD practice principles and OD value. I hope the article has evoked in many of us the desire to rekindle a new constructive debate—followed by motivated action to ensure the movement started in 1952 will provide great traction for moving forward to make the field of OD even more credible.

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Competencies Label	Representative Items	Who Else?
Self-mastery	» Be aware of how one's biases influence interaction » Clarify personal values » Clarify personal boundaries » Manage personal biases » Manage personal defensiveness » Recognise when personal feelings have been aroused » Remain physically healthy while under stress » Resolve ethical issues with integrity » Avoid getting personal needs met at the expense of the clients	**Worley and Varney** – N/A
		Worley and Feyerherm » Clear knowledge of self » Personal philosophies and values; ability to operate within values
		Shephard and Raia Intrapersonal skills (including integrity, staying in touch with one's own purpose and values, active learning skills, rational-emotive balance, and personal stress management skills
Be comfortable with ambiguity	» Perform effectively in an atmosphere of ambiguity » Perform effectively in the midst of chaos	**Worley and Varney** – N/A
		Worley and Feyerherm – N/Av
		Shephard and Raia – N/A
Clarify roles	» Clarify the role of consultant » Clarify the role of client	**Worley and Varney** – N/A
		Worley and Feyerherm – N/Av
		Shephard and Raia – N/A
Clarify outcomes	» Clarify outcomes	**Worley and Varney** – N/A
		Worley and Feyerherm – N/Av
		Shephard and Raia – N/A
Good client choices	» Match skills with potential client profile	**Worley and Varney** – N/A
		Worley and Feyerherm – N/Av
		Shephard and Raia – N/A
See the whole picture	» Quickly grasp the nature of the system » Identify the boundary of systems to be changed » Identify critical success factors for the intervention » Further clarify real issues » Link change effort into ongoing organisational processes » Begin to lay out an evaluation model » Know how data from different parts of the system impact each other » Be aware of systems wanting to change	**Worley and Varney** » System dynamics
		Worley and Feyerherm » Ability to see systems (system thinking)
		Shephard and Raia » Collateral knowledge areas (including behavioural sciences, systems analysis, R & D)
Clarify data needs	» Determine an appropriate data collection process » Determine the types of data needed » Determine the amount of data needed	**Worley and Varney** – N/A
		Worley and Feyerherm – N/Av
		Shephard and Raia – N/A

Competencies Label	Representative Items	Who Else?	
Understand research methods	» Utilize appropriate mix of methods to ensure (1) efficiency (2) objectivity, and (3) validity » Utilize appropriate mix of data collection technology » Use statistical methods when appropriate	**Worley and Varney** – N/A	
		Worley and Feyerherm – N/Av	
		Shephard and Raia – N/A	
Keep an open mind	» Suspend judgement while gathering data » Suppress hurtful comments during data collection	**Worley and Varney** – N/A	
		Worley and Feyerherm – N/Av	
		Shephard and Raia – N/A	
Set the conditions for positive change	» Collaboratively design the change process » Clarify boundaries for confidentiality » Select a process that will facilitate openness » Create a non-threatening atmosphere » Develop mutually trusting relationships with others » Solicit feedback from others about your impact on them » Use information to reinforce positive change	**Worley and Varney** – N/A	
		Worley and Feyerherm – N/Av	
		Shephard and Raia – N/A	
Use data to adjust for change	» Use information to correct negative change » Use information to take next steps » Establish method to monitor change after the intervention » Use information to reinforce positive change » Gather data to identify initial first steps of transition	**Worley and Varney** – N/A	
		Worley and Feyerherm – N/Av	
		Shephard and Raia – N/A	
Focus on relevance and flexibility	» Distill recommendations from the data » Pay attention to the timing of activities » Recognize what is relevant » Stay focused on the purpose of the consultancy » Continuously assess the issues as they surface	**Worley and Varney** – N/A	
		Worley and Feyerherm » Focusing on relevant issues	
		Shephard and Raia – N/A	
Participatively create a good implementation plan	» Co-create an implementation plan that is (1) concrete; (2) simple; (3) clear; (4) measurable; (5) rewarded; and (6) logically sequences activities	**Worley and Varney** » Designing and choosing appropriate and relevant interventions	
		Worley and Feyerherm – N/Av	
		Shephard and Raia – N/A	
Manage transition and institutionalization	» Help manage impact to related systems » Use information to correct negative change » Transfer change skills to internal consultant so learning is continuous » Maintain/increase change momentum » Mobilize additional internal resources to support continued change » Determine the parts of the organisation that warrant a special focus of attention » Ensure that learning will continue	**Worley and Varney** » Managing the consulting process » Analysis and diagnosis » Facilitation and process consultation » Developing client capability	
		Worley and Feyerherm » Ability to design » Ability to deeply understand an organisation	
		Shephard and Raia » General consultation skills (including entry and contracting, diagnosis, designing and executing an intervention, and designing and managing large change processes) » Research Design/Data Collection/data analysis	

Competencies Label	Representative Items	Who Else?
Ability to evaluate change	» Choose appropriate evaluation methods » Determine level of evaluation » Ensure evaluation method is valid » Ensure evaluation methods is reliable » Ensure evaluation method is practical	**Worley and Varney** » Research methods/statistics » Evaluating organisation change **Worley and Feyerherm** » Evaluate and research **Shephard and Raia** » Research & evaluation of knowledge and skills
Manage client ownership of change	» Reduce dependency on consultant » Instill responsibility for follow through » Involve participants so they begin to own the process	**Worley and Varney** – N/A **Worley and Feyerherm** – N/Av **Shephard and Raia** – N/A
Be available to multiple stakeholders (develop relationships)	» Collaborate with internal/external OD professionals » Balance the needs of multiple relationships » Listen to others » Interpersonally relate to others » Use humour effectively » Pay attention to the spontaneous and informal	**Worley and Varney** – N/A **Worley and Feyerherm** » Interpersonal skills » Ability to bring people together » Consider multiple viewpoints **Shephard and Raia** » Interpersonal skills (including listening, establishing trust and rapport, giving and receiving feedback, and counselling and coaching)
Build realistic relationships	» Build realistic expectations » Explicate ethical boundaries » Build trusting relationships	**Worley and Varney** – N/A **Worley and Feyerherm** – N/Av **Shephard and Raia** – N/A
Address power	» Identify formal power » Identify informal power » Deal effectively with resistance	**Worley and Varney** – N/A **Worley and Feyerherm** » Pay attention to power and influence » Consulting is saying the tough stuff **Shephard and Raia** – N/A
Manage diversity	» Facilitate a participative decision-making process » Be aware of the influences of cultural dynamics on interactions with others » Interpret cross-cultural dynamics on interactions with others » Interpret cross-cultural influences in a helpful manner » Handle diversity and diverse situations skilfully	**Worley and Varney** » Comparative cultural perspective **Worley and Feyerherm** » Cultural experiences **Shephard and Raia** – N/A
Manage the separation	» Be sure customers and stakeholders are satisfied with the intervention's results » Leave the client satisfied » Plan for post-consultation contact » Recognize when separation is desirable	**Worley and Varney** – N/A **Worley and Feyerherm** – N/Av **Shephard and Raia** – N/A

Competencies Label	Representative Items	Who Else?
Integrate theory and practice, stay current in technology	» Present the theoretical foundations of change » Articulate an initial change process to use » Integrate research with theory and practice » Communicate implications of systems theory » Utilize a solid conceptual framework based on research » Use the latest technology effectively » Use the internet effectively	**Worley and Varney** » Organisation behaviour (including culture, ethics, psychology, and leadership) » Group dynamics » Management, organisation theory and design » OD & C » Theories and models for change<hr>**Worley and Feyerherm** » Strong in theory and practice<hr>**Shephard and Raia** » Organisation behaviour/OD knowledge and intervention skills (including group dynamics and team building, OD theory, organisation theory and design, open systems, reward system, large system change theory, leadership power and sociotechnical analysis) » Major management knowledge areas (experience as a line manager/major)
Ability to work with large system	» Facilitate large group (70–2000) interventions » Apply the skills of international OD effectively » Function effectively as an internal consultant » Demonstrate ability to conduct transorganisational development » Demonstrate ability to conduct community development » Consider creative alternatives	**Worley and Varney** – N/A<hr>**Worley and Feyerherm** » Large systems fluency » Core knowledge about the field<hr>**Shephard and Raia** – N/A<hr>**Worley and Varney** – N/A<hr>**Worley and Feyerherm** » Functional knowledge of business » Broad education, training, experience » Business orientation<hr>**Shephard and Raia** – N/A

Responses to Dr. Cheung-Judge's Article

Respondents:

Lennox Joseph

Jackie Stavros

Robert J. Marshak

Marc Sokol

Joanne Preston

Lisa Meyer

Elizabeth Nicastro & Claudia Rios-Phelps

As Dr. Cheung-Judge has addressed a critical element in the OD field that has challenged us for decades, we have asked a wide range of members of our community for commentaries to her article.

LENNOX JOSEPH

Dr. Mee-Yan Cheung-Judge's professionally researched and detailed review of OD's journey to establishing the field's core competencies is an invaluable and much needed contribution to the science and practice of OD in 2020. While we deal with major global social unrest, increasing political instability and a health pandemic redefining how we live and work together, it is critical that Organization Development Practitioners (ODPs) realize, now more than ever, the challenges we face as a field and our critical role for supporting and influencing a democratic ethos in organizational and communal life. Of added significance is that the OD field as an area of study and research is under siege as evidenced by the forthcoming closings of university master degree programs at the University of St Thomas (Minnesota), at Sonoma State University (California) and The American University (Washington, DC). This does not include the closing of OD certificate programs in well-established and long-standing institutions that is presently being discussed. Clearly the demand for what OD offers is diminishing.

A hallmark of Mee-Yan's article is its tremendous research, citing 31 major analyses on OD competencies from the field's earliest days of the 1950s to the very present. It not only shows the long journey that OD core competencies have taken to get to their current state, but also the value and integrity OD training institutions and practitioners attach to our core competencies as a means of further validating our practice and supporting its credibility for the future.

Noteworthy in the article is the recommended transition to an OD competency-based practice. Mee-Yan's suggestion that this change could occur through individual requests as opposed to some form of enforcement, warrants confidence and further support for its adoption. This proposed transition plan helps us more easily swallow this bitter pill which we all can acknowledge is of immense benefit to our professional practice even though we often prefer self-identifying our proficiency rather than adhering to an agreed set of competencies. We should keep in mind that OD competencies have been in existence before, however the rigorous and methodological work done by Certified Consultants International (CCI) in the 1980s seems to have almost totally disappeared.

Several reasons come to mind as to why the time is ripe for the OD field to

adopt core competencies. First and foremost is the clear fact that our major stakeholders, the client systems for whom we work, keep requesting a yardstick to ascertain good OD performance. Given that the work of change usually takes some time, ODPs often offer clients a promissory note on the changes they can expect. Working on, clarifying, and distinguishing our core competencies fulfills our client requests for the level of service they can expect and a more systematic mechanism to decide who they engage. It is much better for us as OD practitioners to be proactive in deciding such a standard now rather than waiting for an external force to influence, and even possibly demand, how we regulate and qualify ourselves.

Another reason to support OD core competencies is that struggling together to define them will provide significant discussion that is a critical step to create the cohesion we need. Over recent years the field has become more fragmented and differentiated as evidenced by the low turnout at international conferences. We now only have a few often-misunderstood values that hold us together. The dialogue on the road to consensus on our core competencies will help us understand the myriad perspectives existing in OD and clarify the common ground we hold. The work of producing OD core competencies will help coalesce different elements of OD into an enduring and sustainable systemic paradigm on change that the world needs today.

A third factor is that for too long OD practitioners have relied on a simple description that OD is both 'art and science'—equally disciplined and research oriented while allowing incredible autonomy and creative inspiration. In this depiction the bifurcation of these interests has confused clients, and undermined how the field is viewed, sabotaging the contributions we can provide human systems today.

One of the issues facing the adoption of OD core competencies is the duality of it being both a practice area without regulation and theory/academic based. This long-standing divergence has led to our identification as "practical theorists" or "theoretical practitioners." Practical theorizing essentially means that we practice OD work with a theoretical perspective while generating theory and models to achieve results and advance client learning. Nonetheless, this bridge between theory and practice does not resolve the deep underlying issues about which theories advance the field, and which are change methodologies created out of practitioners' skills and intuitions. Deciding on core competencies means the OD field will have to review the way it looks at the interplay of practice and theory and find a more meaningful way to assess foundational theory that supports the creation of value for clients and knowledge for practitioners.

The seeming imbalance among various OD degree and certification programs can be addressed in the search for core competencies. Globally, candidates desirous of entering OD often travel long distances to gain what they consider a higher status and more thorough OD education than those provided locally. Regularizing and accepting OD core competencies supports the inclusion of local OD training efforts in countries now developing their OD capabilities. Moving to an agreed upon set of core competencies therefore allows greater global equity for the entry, knowledge acquisition, and skill development of future ODPs.

More than ever before core competencies are needed in the OD field. OD's impact has been undermined by our inability to organize ourselves and determine a list of competencies that define us and provide social cohesion for our efforts. As in the guilds of old, standards and competencies define mastery in a field and allow practitioner skills to be transparently offered in a marketplace adding to the integrity of a profession. The fact that the OD field's almost 80-year history has not yet defined practice standards contributes to one image of us as fluffy, more process- and emotionally-focused than results oriented, often disparaging what we can offer to organizations, communities and to advance social change.

As someone who has worked in and led an OD practice in a large transnational organization I can attest to the need for core competencies that not only define the field but brand it as a credible and trustworthy contributor to organizational and community life today. The need for OD core competencies is now more pressing than ever. Mee-Yan Cheung-Judge posits a powerful challenge for the OD field to agree on a set of core competencies and the means to do so. What is left is for OD organizations, training associations, universities, and practitioners to respond in an overwhelmingly affirmative manner.

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I appreciate the thorough and thoughtful contribution by Mee-Yan Cheung-Judge, and most importantly, her bringing to the forefront the debated topic in OD on competency agreement and certification of competencies. For many years now, it is the debate that goes on and on for us. After reading her assessment, position, and ideas, I asked myself why does it matter, and does one matter more?

Hopefully—we agree there is no simple or single answer. Yet, Mee-Yan Cheung-Judge does a clear and focused job reminding us what it is about, why it is important, and possibilities to move forward—thank you!

To help us think more clearly about this, she starts with understanding the motivation behind the pursuit and what *competency* and *certification* means to the OD world. What I learned from Mee-Yan Cheung-Judge's article is that competency and certification are different, important, and complex. She does a detailed job in *Table 1* of presenting all the efforts of the field for almost the last 70 years. Let's take a look at what competency and certification means to our profession.

Just what is a competency? It is a combinate of knowledge, skills, and abilities based on both formal or professional education and practice to successfully complete a task. Why we must have a list of competencies is to know that OD practitioners are qualified to do their work with no harm to the system and make a positive contribution. Now, once competencies are agreed upon, the bigger question is how to assess attainment. Is it going to be based on training, on-the-job learning, assessment, and/or formal qualifications? And who will assess? She offers a thoughtful way forward on balancing the polarities, a set of helpful intervention questions, and proposes how we might move forward. Imagine that doing an intervention on our profession—check out *Table 3* (page 16).

Then, she weighs in on what and how credentialing can be done and by whom. When you get into credentialing, the topic of certification comes up. Certification is all about credentials. When a group of certifying bodies get involved in credentialling, that represents a standard of quality and commitment on part of the profession. It shows that we have an agreed upon set of standards—competencies that we are committing ourselves and others to follow through to achieve and sustain it. And Mee-Yan Cheung-Judge provides the key stakeholders and suggests what their strengths are and how they can help to validate the knowledge, skills, and abilities in OD. The only concern that I have is the timeline may take more than allocated. Isn't that always a challenge to find resources: time, people, and funding?

And there is one more thing to consider, once someone is certified, what is required to maintain certification? When it comes time to answer this question, we will have figured out the competencies and if, how, and who will be certifying. For now, I appreciate Mee-Yan Cheung-Judge's work and support a dialogue on co-creating a CORE set of competencies and the comprehensive menu as the right pathway forward for the OD profession, field, and discipline, and even that is up for debate: is OD a profession, field, and/or discipline? (For more information on that debate: *https://managementhelp.org/organizationdevelopment/index.htm*).

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> **... once competencies are agreed upon, the bigger question is how to assess attainment. Is it going to be based on training, on-the-job learning, assessment, and/or formal qualifications? And who will assess? She offers a thoughtful way forward on balancing the polarities, a set of helpful intervention questions, and proposes how we might move forward.**

Applause to Dr. Cheung-Judge for her thoughtful review of the many OD competency efforts conducted over the years and some of the issues and dilemmas associated with them. Given the continuing interest in, efforts to address, and debates about OD competencies, her suggestion of a different way to address them is worth serious consideration.

I'll leave to others to debate specifics, raise concerns, suggest additional ways to move things forward, and also add their thanks to Mee-Yan for her efforts on behalf of a community she cares deeply about. Instead I'd like to add one additional consideration to her approach, or any other efforts related to OD competencies.

Right now, the issues are framed sometimes as what are the competencies for the **OD Field** and perhaps more often as what are the competencies of a **(Professional) OD Practitioner**. Now, of course, fields and professions are overlapping concepts, but by no means identical. Fields like medicine, law, accountancy, etc. have certain minimum values, ethics, and competencies. They are also composed of different types of members. The field of medicine has medical doctors, but also nurses, specialty technicians, nontraditional healers, and so on. Knowledge fields are similar. The knowledge

field of psychology has certain core theories, values, ethics, etc., but anyone can claim to be part of that field if they take some courses and read some books. Psychological professions, whether therapist, counselor, and so on, are assumed to have a different level of knowledge, skills, and practice than someone who is simply knowledgeable about, or has some kind of degree in, the field. Like lawyers and medical doctors, they are also certified and regulated by governing bodies and laws to insure (assumed) minimum levels of professional competency to protect potential clients.

In some ways I think many of the past competency efforts have conflated what at the time were considered important competencies for the **Professional Practice of OD** with what competencies (especially knowledge and values) are essential to be a member of, or aligned with, the **Field of OD**. Given that the issue of certification keeps looming in the background, it makes sense to me to talk explicitly about the competencies needed for the professional practice of OD, as distinguished from, or in addition to, the competencies needed to be considered a member of the OD field. Of course, talking explicitly about "the professional practice of OD" raises all sorts of difficult issues unsuccessfully

dealt with in the past: are OD practitioners even remotely professionals like doctors, lawyers, accountants, therapists, etc.; whose criteria and judgments would establish the competencies; what sanctioning body would have the authority to monitor or determine who was in and who was out; could practitioners self-certify; and how not to create barriers for the continuing development of what is considered OD; to name a few. These issues recede into the background somewhat if trying to establish competencies for responsible membership in the OD field, since in that case the responsibility is mainly to fellow OD members and less directly or not at all to potential clients.

I should add that by raising these distinctions I am not advocating for an effort addressing the competencies needed for the professional practice of OD nor the competencies for membership in the OD field. Instead, I am advocating that future OD competency efforts explicitly think about if they are developing competency criteria for OD as a field or for the professional practice of OD and if for both how is each addressed.

Robert J. Marshak, *Distinguished Scholar in Residence Emeritus, American University* *marshak@american.edu*

> Given that the issue of certification keeps looming in the background, it makes sense to me to talk explicitly about the competencies needed for the professional practice of OD, as distinguished from or in addition to, the competencies needed to be considered a member of the OD field.

The Road to Revitalization

Mee-Yan Cheung-Judge (2020) provides a valuable review of organization development (OD) competencies across the history of this field, leading to a perspective on revitalizing the profession. In the following commentary, I hope to extend her discussion on competencies and distinguishing features of competence in OD professional practice.

Competencies are descriptors for clusters of knowledge, skills and abilities (KSAs). Within organizations and across variety of jobs, these are part of the process for increasing the validity of selection, training, and distinguishing levels of expectations, both in role and at different levels of leadership. We often use competency modeling as a key step in job analysis and selection practices to predict performance and mitigate adverse impact. When professional associations employ competencies, they are often doing so for a variety of reasons: to clarify essential components of practice; to provide a path toward certification if such credentialing exists; to self-manage professional practice and limit external regulation; to establish who can provide services to the public; setting industry standards that create an entry barrier into practice for those who lack the designated competencies or certification.

Useful as they are, competencies don't tell us how well one performs, just the array of distinct categories of KSAs. When there are many competencies it is often useful to also have clusters or dimensions grouping related competencies. With that principle in mind, I was able to reframe Cheung-Judge's *Table 2* into two clusters, internally and externally facing competencies. Internal competencies are reflective and analytic, occur within the mind of the practitioner, but they may not be visible to the consumer. External competencies are visible to those with whom the OD practitioner is working. The internally focused competencies might further be divided into two categories, those that involve analytic assessment of the opportunity and those that involve the practitioner's ongoing

reflective state and use of self. External competencies can also be divided into two categories, initial structuring of the intervention and managing the process over time. This clustering of Cheung-Judge's competencies is presented in *Table 1*.

A change management approach, like Prosci, might employ somewhat different competencies to provide an analytic perspective, but with key focus on structuring the intervention and managing the process over time, relying on the ADKAR model (Hiatt, 2006). I expect that they would propose far less, if anything, about management of self as a cluster of competencies; rather it is the simplicity of their change process that they seek to highlight. In contrast, I believe it is this latter cluster of competencies, management of self that leads to ongoing differentiation of OD professionals.

Similarly the large national consulting firm that has developed a specialty practice in change management might have a highly structured analytic perspective with elaborate data gathering, analysis and report out used across all companies with whom them consult. Their key differentiator is often the benchmarking they provide, illustrating how one company compares to others. This is followed by an equally structured plan for change. The intent is to provide a scalable framework over many companies with the capability to bring in a team of less experienced consultants who follow a highly specific model regardless of the firm. Like the previous example, this business model also would not embrace individualized management of self as a differentiator of service delivery.

From my perspective the best practitioners aren't those who have the 5- or 7-step model that looks visually appealing and

Table 1: *Clusters of OD Practitioner Competencies*

Inward Reflective Competencies	**Outward Demonstrating Competencies**
Use and Management of Self	*Structuring the Engagement*
1. Self-mastery	1. Clarify roles
2. Comfort with ambiguity	2. Clarify outcomes
3. Good client choices	3. Clarify data needs
4. Focus on relevance and flexibility	4. Set the conditions for positive change
5. Keep an open mind	5. Participatory create a good implementation plan
	6. Build realistic relationships
	7. Be available to multiple stakeholders
Maintain Analytic Perspective	*Managing the Process Over Time (Intervene at the right time)*
1. See the whole picture	1. Manage client ownership of change
2. Understand research methods	2. Ability to work with large system
3. Ability to evaluate change	3. Address power
4. Integrate theory and practice, stay current on technology	4. Manage diversity
	5. Use data to adjust for change
	6. Manage transition and institutionalization
	7. Manage the separation

applies to all situations, but instead it is the practitioner who can embrace the panoply of frameworks alluded to in *Table 1* of Cheung-Judge's article. They do so in the way that they cycle through the competency clusters, perhaps beginning with internal analytic assessment, using that to help structure the engagement, then continually make use of self to assess the need for adjustment, and bring their full set of capabilities to the client and tasks at hand as they manage the process over time.

Use of Self, described in the research of Cheung-Judge and Jamieson (2020) and Jamieson and Davidson (2019), captures the detailed study of how OD professionals make use self as an integral component of change and OD consultation. It is in this sense that we embody what Donald Schön (1983) described as the reflective practitioner, a professional who recognizes the importance of context on shaping the issues that must be addressed. Reflective practitioners understand that how you frame the problem can impact the type of approach and solution you will reach. It is for that very reason, whether they enter the system as an executive coach, via team development, or culture assessment, they embrace multiple models and continue to explore with a variety of diagnostic lenses. The reflective practitioner is a professional who deeply appreciates use of self as they carry out their work.

If we pause and look at the wider consulting industry, we can recognize the polarity of a profession and its standards juxtaposed with an entrepreneurial spirit and competition that exists for securing work in a competitive marketplace. Among the hallmarks of the reflective practitioner that bridge this polarity is the OD consultant's ability to step back and consider the context of the problem at hand; to embrace multiple models; to see opportunities from different perspectives. For consumers, who can't see what is going on inside the OD consultant's mind, we need to capture and share the story of how reflective practice matters. We need to articulate the impact of our intervention, shining a light on how use of self makes a difference in the process and quality of OD consultation.

Where change agents, under the guise of OD or any other label, have taken up their business development efforts as a hammer in search of a nail, they may have been able to market and sell services, but they haven't advanced the profession. The road to OD revitalization is to recognize the importance of context and situational analysis and make it tangible for consumers. We need to help consumers of OD services appreciate the importance of these particular competencies as they choose a partner. If a prospective client wants to simply check the box, benchmark against what looks pretty on a PowerPoint deck, or outsource their thinking and engagement in transformation of the business, then any attractive model will be sufficient. If on the other hand, they see transformation as a key responsibility of the leadership team, and realize an OD partner must be engaged in a dynamic change process with them, they should be looking for consultants and OD staff who have learned to effectively use his or herself as instruments of change.

The road to professional revitalization doesn't just pause at a competency way station called 'management of self.' Rather the competencies that allow for management of self become our compass and trusted resource as we embrace all other OD competencies, and as we ensure we provide the best possible OD support for our clients.

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> The road to OD revitalization is to recognize the importance of context and situational analysis and make it tangible for consumers. We need to help consumers of OD services appreciate the importance of these particular competencies as they choose a partner.

The article by Mee-Yan Cheung-Judge, entitled OD Core Principles, OD Competency, and Use of Self?, is one of the most comprehensive manuscripts summarizing the past and future endeavors that the organization development and change field has made in competency identification. I applaud the work that has gone into this article and the thought about the direction that our profession can take to formalize this procedure.

I came from a psychology background and my training has been about the strength of the American Psychological Association and the strides it made to professionalize the psychology field. It has gone the route of identifying and legalizing what it means to be a psychologist to the extent that this association can dismiss and punish individuals who do not behave according to the standards of the professional and state requirements of this field.

Yes, the requirements of states are rigorous to the point of punishment if you move from one state to another. I found OD to be a more open field with accepting people who put aside judgement. My home is in organization development and I left my roots only a few years after I received my PhD. My honest fear is that OD will follow in the footsteps of an already created model.

I am all for making our field professional, and I too want to have a unifying statement of competency to protect the public as well as the reputation of our field. I just do not want to go as far as the American Psychological Association has gone with legalizing and standardizing education, training, practice, and state evaluation of practitioners in the organization development field. We come from a humanistic tradition and I want to maintain our ethics and way of interaction that has flexibility

and cooperation with educational institutions, corporations, academics, practitioners and new people into the field.

When any group and individuals take on this challenge, I urge them to remember our roots. Synergy is the basis for growth and thinking outside of an already made box, creatively. This is the best way to approach this exciting professional challenge. Please remember there are always many solutions to any issue and coming up with a Superordinate goal that excites all involved is not easy but does produce real cooperation.

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> **We come from a humanistic tradition and I want to maintain our ethics and way of interaction that has flexibility and cooperation with educational institutions, corporations, academics, practitioners and new people into the field.**

The "Thing" About OD

I believe in Organization Development. I believe the world needs more professionals who are prepared and willing to work from multiple perspectives, across multiple disciplines and in the messiness of real-world problems. I am concerned about attracting new people to the field as well as training and nurturing the next generation of broad-minded, discipline-spanning, pragmatic systems thinkers.

Yet, in reflecting upon this challenge, I have become increasingly aware of some intractable problems in the well-entrenched and time-honored narratives of OD that are detrimental to the flourishing of innovation in organization development scholarship and practice. And I wonder if a focus on OD competencies prevents new, more inspiring narratives, from emerging.

The philosopher Richard Rorty (1989) wrote that the trouble with arguments against the use of a familiar and time-honored vocabulary is that they are expected to be phrased in that very vocabulary. And this has been the ongoing challenge in seeking new narratives for organization development.

Narratives That Hold Us Back. In his 2018 article entitled *The Rise and Fall of the Growth of Organization Development*, Warner Burke wrote, "The fundamentals of OD have been invented and have served us well, but little if any innovation has occurred in the field since 1987 when appreciative inquiry was introduced" (p. 188). Burke said the field of OD is stagnant and not growing with respect to inventiveness and innovation, a conclusion he drew from his historical analysis of OD. Burke's narrative that labels OD as a "stagnant thing" not only holds us back, it also ignores new theories of leadership, dynamic capabilities, diversity, equity and inclusion, design thinking, growth mindsets, neuroscience-based learning systems, sensemaking, Use of Self, Agility, and much more that can now be added to the arsenal of knowledge and tools for organization development.

Narratives That Can Be Inspiring. Freeman and Gilbert (1992) wrote that it is only by profoundly challenging the descriptions and narratives of our world that we can improve it, and this is what I attempt to do here. The original inspiration behind organization development was as an intellectual movement responding to oppressive modes of management. It has over time offered numerous ways to resolve conflict, to create greater flexibility and resiliency in individuals and to help organizations cope with turbulent environments. These things are as crucial today as they ever have been. And, with its Lewinian foundation and wide range of participative tools and techniques for promoting behavior change, OD is today considered the major approach to organizational change. But, like any important social, political, or intellectual movement, fresh ideas are needed to sustain energy and relevance over time and across successive generations. This is not an argument against OD, because OD is organization development. But it is not all that organization development can be.

A Different Class of Thought. Organization development is centered on continuous adaptation in ever-evolving environments and balancing the needs of diverse stakeholders. It should not be put in a box and labeled a "stagnant thing." It is best considered as an altogether different class of disciplinary thought, along with innovation, entrepreneurship and design, where it is defined in the doing—an interplay of theory and practice that forms a way of thinking about experiences and problem-solving. This class of disciplinary thought is distinguished by the integration of theoretical knowledge from many disciplines along with practice knowledge. It is also looking to innovative design thinkers like Steve Jobs and emerging practice-driven concepts like stakeholder theory for new knowledge that has yet to make its way into OD textbooks. Its scholarly home is the scholarship of integration—multidisciplinary, integrative, and problem-focused.

Many Guises and Manifestations. Organization development can take on numerous guises within organizations. It shows up in expected ways, in OD professionals who are trained in interventions that diagnose, design and facilitate change solutions for organization problems. It also shows up in unexpected ways with people at multiple levels inside organizations viewing problems from a systems perspective, identifying interdependencies and closing gaps in understanding through learning. It also shows up as an executive function concerned with the alignment of purpose, business models, organization design, culture, strategy, processes, policies, incentives, and technology. These are all manifestations of organization development being integrated into many types of work, and it portends a different future for the field, one that will attract bright, enthusiastic new talent to organization development.

One of the most exciting and empowering features of organization development is being where we are today, situated in a problem at the nexus of the past and a co-created future. While a narrative around OD competencies may help to make OD a better "thing," it is not an inspiring narrative for organization development.

I ask you to imagine the difference if the energy around OD competencies could be redirected into creating and sharing a more inspiring, vibrant future for organization development, for the success and well-being of all people and organizations.

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OD 2.0:
Enabling A Virtual Reality

Introduction

We are two emerging OD practitioners (ODP) on the brink of graduating from our Master of Science in Organization Development (MSOD) program at American University (AU). We started our respective learning journeys in January 2019 together with ten other students in an in-person residency. In March 2020, the program delivery changed drastically, as did the rest of the world's functioning, due to COVID-19. In a few short weeks, we will be ending our program waving to each other through boxes on screens. And in a few short months after that, the next—and last—AU MSOD cohort will graduate, and the program itself will shutter its doors, an early casualty of the pandemic after years of issues with recruitment and retention. Our education has been shadowed by hearing that OD is "bad" at marketing, and we could not argue with this perception—we both found the gift of this program as if by accident, thanks to word of mouth. Having grown so much through this program, we grieve the ending to come as we near graduation and the loss of the mighty AU MSOD program.

This context sets the tone for our response to Mee-Yan Cheung-Judge's OD competency article. Not only as members of the next generation of OD practitioners but as the generation of virtual OD practitioners. OD and its competencies need to be brought into the future to reflect connecting, working, and facilitating virtually. COVID-19 has shifted the landscape dramatically, and the OD competencies themselves and how they are leveraged should reflect this. We might not be in a pandemic forever (we hope), but we will experience the ripple effects for a long time to come. While we have leaned on the competencies we have learned through our OD training to stay present even during the most VUCA of times, they must now be approached differently. We are so far past a "now, more

than ever" moment. It is time for a 2020—and beyond—of OD. In our response, we agree with Dr. Cheung-Judge's more action-oriented approach on moving forward, and we share some perspectives on the competencies and how we would like to see them used.

The What: Reactions to Competencies

Mee-Yan Cheung-Judge notes that it will not be productive to focus on the WHAT and the focus needs to be on the HOW (emphasis from the author). Having already been exposed to multiple competency lists during our education, and learning more about the history from her article, we believe there is something to be said about moving forward and taking action. At the same time, the competencies are worth revisiting, especially with a lens for the skills/competencies that will propel us into the 21st century. Therefore, we are compelled to address some of the "what" before moving on to the "how."

The future of OD is virtual, and the competencies need to reflect that. As we shifted to complete our degrees and perform our day jobs online, we had a lot to figure out—and quickly. We found ourselves experimenting with and sharing across our cohort how to virtually design the high-touch in-person experiences we had learned about in school, how to create connections virtually, and what self-care looked like to combat "Zoom fatigue," not to mention what this world-wide change might mean for the future of our work. Hardly any of our reading covered how to do this virtually—any articles we were pointed to were considered "optional." Virtual work is not optional anymore.

Connecting, working, and facilitating virtually are a top priority. We noticed that in the article, the competency "Integrate theory and practice, stay current in technology" includes a bullet: "use the internet effectively." Nowadays, there is much more to consider in technology than just being able to use the internet effectively. Employees and companies have embraced the virtual workspace, and companies focus on

building high-performing remote teams' capabilities. People can work anywhere. Companies see "an uptick in productivity when employees are working more communicatively and collaboratively. This productivity hike offers a $900 billion to $1.3 trillion value to the economy. [Additionally] a remote workforce delivers several advantages to small and growing companies; talent can be sourced from anywhere in the world, and at price points that work for both the company and the employee" (*"Collaborating on the Future of Work,"* 2020). This push toward remote work opened up more doors for ODPs to work globally. We, ODPs who are coming out of school with a fair amount of experience in this area know the vital role technology played in our school work. We can no longer be scholar-practitioners without being well-versed in at least a few virtual *collaborations tool*s. Virtual collaboration is the name of the *new* game.

The nature of how we engage with clients and our systems to do the work is changing. For example, virtual data collection needs to account for the OD practitioner working harder to process non-verbal cues like facial expressions and body language via video chat, and missing key data points from not visiting client buildings and offices in person (*"Here's why you're feeling Zoom fatigue,"* 2020). This skill is brought even more into center stage as we design interventions and need to account for technology while responding, as best we can, to the human elements.

The humanistic values of OD keep people, connection, and care at the forefront of our work. Now, the leaders we will support, and the people affected by the decisions we will help them make are on a different level than ever before. Checking in on mental, emotional, and physical planes are a foundational part of any OD engagement. And right now, the uncertainties individuals are facing are unprecedented, we cannot take for granted the impact it has on wellbeing. Elements of self-care should be present throughout these competencies as a preliminary way of connecting and working virtually. As we

OD Portal Concept

1

OD Portal

The site for ODPs around the world...

2

Site Map - Content

OD Capability Inventory

ODP selects

Specialization

Level of System Work

Scale and Size of Work

Sector of Specialization

Output= Inventory of Capabilities...Customized

ODP Self-Assesment

ODP selects OD area/work that they wish to asses

Input...

Area of Specialization

When do you wish to be assessed?

Output=List of Advisor/Coaches in the area

Mentors and Advisor Connection

Filter by: specialization, degrees, job experience, etc.

Mentor/Advisor Profiles

OD Programs and Certifications

Specialization

Geographical Area

Type of Degree/Program

Length of Program

Institution Name: Types of Programs Contact Info.

Output=List of Academic Institutions or ORganizations

Professional Profile Pages

Name:
Organization/Place of Work:
Title.
Academic Institution/Organization (degree or other association:
Contact Info:

Job Openings

Specialization

Experience Level

Salary Range

Geographic Region

Full time or Part time

Output=List of job opportunities

Networking Page

Upcoming Zoom Chat

Other Event

Distribution List

OD Journals

Fall Issue of OD Journal

Other Professional Journals

More...

Upcoming Events and Conferences
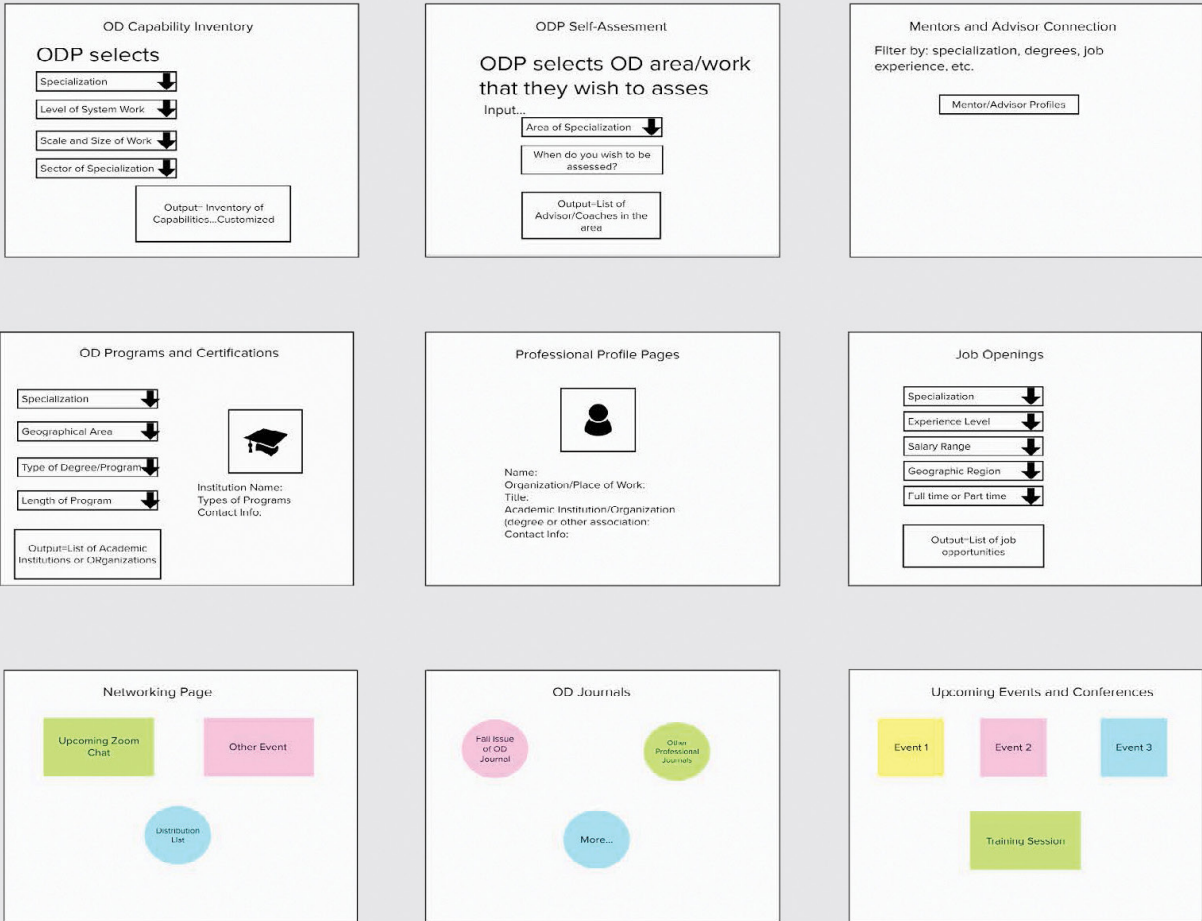
Event 1

Event 2

Event 3

Training Session

Figure 1: OD Portal Interface Storyboard

engage virtually and build authentic relationships online, more training and competency in this area is essential.

The How: Reactions to Article and What We Would Like to See

Mee-Yan Cheung-Judge brings forth ideas around how to make use of the competencies. Our understanding of what the author proposes in our role as emerging OD practitioners is to use the competencies to map a path for ourselves in the OD field. As we visualize ourselves having just graduated, considering our next steps and what we would want to know, we imagine an online portal built for connection through competencies.

We envision a self-service career planning tool that enables connections to OD and each other. A unified place of information and people exchange, where tools can be crowdsourced and debated. We want the directory of LinkedIn with the search functionality of Google. In our minds, this would enhance OD practitioners' abilities to more effectively represent the field by creating connections between students and programs and expanding networks and access for ODPs to evolve as they move forward in their careers. With raised awareness of career paths and specialties, the field would be better for it.

The OD Portal Concept

The OD Portal concept is an online platform that offers ODPs a one-stop-shop site. Practitioners of all levels of experience can complete a self-assessment of OD capabilities, find specialization paths, connect with other ODPs, match up with mentors/advisors, find academic programs and professional certifications of interest, OD events, training, and more. All resources coming together in one place. The portal would be a resource we wish existed today, as we finish our program.

The Portal May Include the Following Areas:
» OD Capability Inventory
» ODP Self Assessment
» Mentor/Advisor Connection
» OD Programs and Certifications
» Academic Program and Certification Profile Pages
» Professional Profile Pages
» Job Openings
» Networking Page
» OD Journals
» Upcoming Events and conferences
» ODP Communication Network

Conclusion

We understand and agree with Mee-Yan Cheung-Judge's desire for action around deciding and using OD competencies, and propose that these actions be done with an eye for OD done virtually. COVID-19 has impacted the workforce, and therefore our work, irrevocably. The conversations that have been had around OD competencies cannot be continued in the way they were. What the competencies are and how we bring them into practice in a way that reflects the current work landscape must be different. The next generation of OD is graduating into a vastly different world, and we invite you to join us in it.

Welcome to virtual OD, we look forward to connecting with you on the portal.

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Extra Resource

COVID-19 Era Will Tell Us Much About Future of Collaboration Tools. *eWEEK.* *https://www.eweek.com/enterprise-apps/covid-19-era-will-tell-us-much-about-future-of-collaboration-tools*

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> **We envision a self-service career planning tool that enables connections to OD and each other. A unified place of information and people exchange, where tools can be crowdsourced and debated. We want the directory of LinkedIn with the search functionality of Google.**

"Despite the widespread nature of workplace bullying and deep harms that this behavior creates, many organizations do not take a proactive stance to manage this workplace issue that affects approximately 65 million workers in the United States."

OD Strategies and Workplace Bullying

Approaches for Prevention, Existing Issues, and Post-Event Understanding

By Debra Orr and
Mark Seter

Workplace bullying costs organizations an estimated $250 million a year in direct expenses related to absenteeism and lost productivity (Bartlett & Bartlett, 2011; Baillien, Neyens, De Witte, & De Cuyper, 2009). Other issues for organizations, beyond the financial, as a result of workplace bullying include: increasing workplace errors (Paice & Smith, 2009), loss of creative potential (MacIntosh, 2005), turnover, retraining and litigation (Grim, 2015; Kivimaki, Elovainio & Vahtera, 2000; Namie, 2007; Ayoko, Callan, & Hartel, 2003; Von Bergen et al., 2006). Poor customer relationships are also prevalent among organizations with higher incidents of workplace bullying (Johnson, 2009; MacIntosh, 2005; Namie, 2003, 2007).

Furthermore, workplace bullying was reported to negatively affect the target's relationship with peers and supervisors (Glaso, Nielsen, & Einarsen, 2009; MacIntosh, 2005), lower teamwork (Baillien et al., 2009; Gardner & Johnson, 2001), reduced morale (Namie, 2003), and decrease organizational commitment (Gardner & Johnson, 2001), all of which have significant implications for the organization's culture.

The harms caused by workplace bullying do not end with the financial issues or the impact on organizational productivity. Many targets of workplace bullying suffer serious health problems as a result of their experiences (Einarsen, 2000). Targets of workplace bullying often have lasting issues with post-traumatic stress disorder, symptoms of low self-esteem, anxiety, sleep disturbance, recurrent nightmares, somatic problems, concentration difficulties, irritability, depression, distress, and feelings of self-hatred (Mikkelsen & Einarsen, 2002; Bjorkvist, Osterman, & Hjelt Back, 1994) as well as shame (Felblinger, 2008) and often require counseling (MacIntosh, 2005). There are even allegations and a resulting lawsuit that severe harassment has resulted in a compromised immune system and accelerated a target's death (Balsamini, 2019).

Despite the widespread nature of workplace bullying and deep harms that this behavior creates, many organizations do not take a proactive stance to manage this workplace issue that affects approximately 65 million workers in the United States (Grim, 2015). Most organizations have a poor response and an inability to handle these negative interpersonal interactions, incivility, and bullying (Hodges, 2014). In fact, as recently as 2017, the literature has not revealed a demonstrated successful pattern for handling workplace bullying (Einarsen, Mykletun, Einsarsen, Skogstad, & Salin, 2017).

Organization Development strategies are appropriate for addressing workplace bullying. OD has a deep history of promoting humanistic values. OD focuses on creating healthy organizational cultures that value learning, open communication and a combination of individual and organizational growth. The ability of OD to work in and between multiple levels within organizations, including the individual, group and organizational levels, make OD well suited to address both individualistic

issues, group problems, and organization-wide dysfunction. OD has four main categories of interventions, each with application to workplace bullying:

» **Human relations interventions** are those which focus on how individuals interact, resolve conflict, and develop emotional intelligence which are key to working with individual issues in workplace bullying situations, (Cummings and Worley, 2015).

» **Human resources interventions** are those which create role clarification, diversity initiatives which specifically address some of the root causes of bullying. Role confusion, diversity issues, and anxiety around change are chief causes of workplace bullying (Cummings and Worley, 2015).

» **Techno-structural interventions** are those which address organizational structure, reporting relationships, and work design. Reporting relationships are a confounding issue in workplace bullying and organizational structural issues contribute to the challenge (Cummings and Worley, 2015).

» **Strategic interventions** are those which address large-scale ways that organizations address problem, such as culture change. Some organizational cultures would not tolerate workplace bullying where in other cultures the practice might be quite common (Cummings and Worley, 2015).

This article provides research-supported Organization Development strategies that can assist in prevention, work toward favorable resolutions of current issues, and address post-event resolution are explored.

Defining Bullying

What is actually meant by bullying? Bullying is different than being impolite or making a one-time joke at someone else's expense. That form of negative interaction would be termed incivility. Incivility is inappropriate behavior that is minor in nature and it is not meant to harm others (Pearson and Porath, 2004). Bartlett and Bartlett (2018) articulate that "workplace bullying is viewed as repeated,
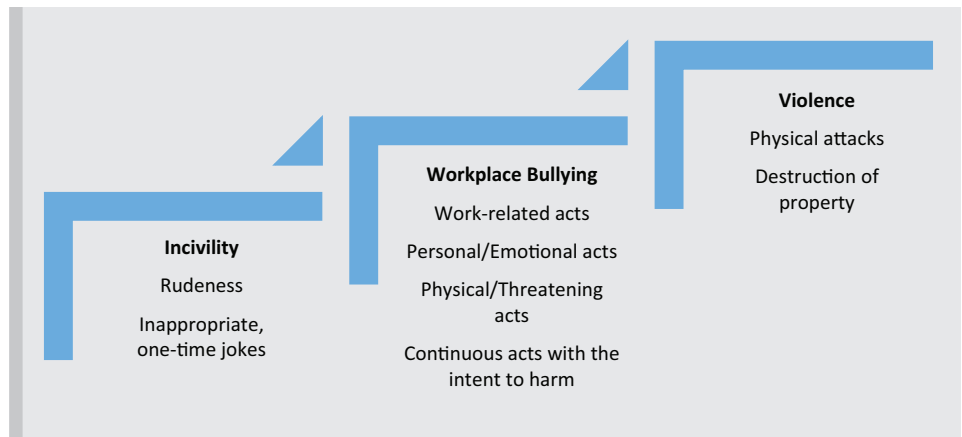

Figure 1. Types of Workplace Bullying

unwelcomed negative act or acts (physical, verbal, or psychological intimidation), that can involve criticism and humiliation, intended to cause fear, distress, or harm to the target from one or more individuals in any source of power with the target of the bullying having difficulties defending himself or herself." (Rodríguez-Muñoz, Mirko Sanz-Vergel, 2017; Einarsen, Hoel, Zapf & Cooper, 2011). In workplace-bullying literature, the bully is referred to as the "instigator" and the person being bullied is called the "target" (Harvey, Treadway, and Heames, 2007).

There is sometimes confusion between what is considered bullying versus what is considered harassment under Title VII of the Civil Rights Act of 1964, the Age Discrimination Act of 1967 and the Americans with Disabilities Act of 1990, the distinguishing feature between harassment and bullying is the status of a protected class and any *quid pro quo* for the continuation of employment. Bullying does not require that the behavior be perpetrated based on a protected status or that there be some form of exchange in order to remain employed, while the legal definition of harassment does.

Namie (2003) created a continuum to classify hostile acts in the workplace. It begins with the idea of incivility progressing to bullying and concludes with violence. Acts of workplace bullying by the instigator tend to be categorized into three main areas: work related acts, personal/emotional acts and physical or threatening acts.

Work-related acts include creating work goals or amount of work that are unrealistic, relentless criticizing and conflicting directives.

This email stated the directive to continue the process in question without any revisions. It went on to say that it was irresponsible of me to even question this process and it showed a lack of work ethic.

I knew I had never seen this email. I had never received this email. To say I was in a state of shock would have been an understatement. But it gets worse. Next a piece of paper was placed in front of me and I was told to sign the document. It was an official write up which would be filed with the Human Resource department and placed in my personnel file. At this point I had been employed with this institution for 15 years, working in a different department for a different VP. I had never been written up and had "exceeds expectations" on all employee reviews.

The next day I asked two high-level members of our IT department to look at this supposed email directive. Each person pointed out several ways they could tell this was not an actual email sent to me. It was forged, a fake, a copy of a document he created and did a cut and paste to make it look like an authentic email.

Personal and emotional acts include name calling of an individual target and being excluded from group activities, conversations, and decisions.

They would corner me at the copier, calling me a snitch. (They would) walk past my classroom when I was teaching and yell, "I smell a rat!" They would throw trash in my classroom after school. When I asked my principal to do something since my classroom was between

theirs, she just said she could move my classroom.

Physical and threatening physical acts of violence, attempting to physically hurt another person by inducing illness and destruction of property in a manner that denotes a threat.

She invited herself over to my home for a glass of wine since we had a "seminar" out that way. When I poured the wine I went into my kitchen and saw what horrified me in the reflection of my china cabinet. She took a sip of her wine and spit it back into her glass and then POURED HER GLASS INTO MINE! (emphasis from the research participant) I had known via our office that she had mono, so now apparently she was looking to spread it to me to get rid of me at the office. I poured my wine out in front of her.

Stats on Prevalence

There are numerous statistics which detail the extent and impact of workplace bullying. *Table 1* summarizes this data.

Less than 20% of organizations take steps to stop workplace bullying tending instead to rationalize, minimize, or deny it is occurring (Namie, 2014). Bystanders to the bullying tend to mitigate the issue to a somewhat greater degree than the formal organization does with roughly 38% of bystanders aiding the target privately or publicly, while another 38% of bystanders do nothing (Namie, 2014). According to Gardner and Johnson (2001) wrongful discharge lawsuits are a legal issue of workplace bullying for organizations to consider when addressing this issue.

Outcomes to individuals are viewed in terms of impacting work, health (physical and emotional), and affective domains such as motivation. Negative organizational impacts of workplace bullying are classified in terms of cost, productivity, reputation, legal issues, and organizational culture." One target explained, *"It became okay to be mean. No one wanted to intervene; they were scared. The whole team was bullied. He was being protected by someone higher in the organization. It was the middle of the recession*

Table 1: Summary of Statistics on Workplace Bullying (Namie, 2014)

Number of employed people who have been or currently are bullied	27%	37 million people
Number of people affected by workplace bullying (as a target or bystander)		65.6 million people
Gender breakdown of instigators	69% male	31% female
Gender breakdown of targets	Male instigators select female targets 57% of the time and male targets 45% of the time.	Female instigators select female targets 68% of the time and male targets 32% of the time.
Most common outcomes of workplace bullying	82% of the time the target loses his/her job.	18% of the time the instigator loses his/her job.
Role of the instigator versus the role of the target	56% of workplace bullying instigators are the boss of the target.	44% of instigators are not the boss of the target.

and I quit without another job." This target's experience is underscored by Gardner & Johnson's 2001 study that "when those at the top adopt bullying tactics, they send a green light to everyone else in the organization to behave likewise," (p. 23). This underscores how an organization's culture can become toxic through a workplace bullying incidents.

Potential Solutions

Successful mechanisms to address workplace bullying have been difficult to identify due to the nature of the issue, the unlikelihood that it will be formally addressed, as well as the opportunity for researchers to fully engage this sensitive question. Evidence for research-supported approaches are difficult to find (Gillen, et al, 2017). This section creates an initial research-supported guide, gathered from the peer-reviewed literature, which identifies for OD practitioners interventions that are appropriate to address the issues of workplace bullying. Strategies are presented for organizational level interventions, target-based interventions, instigator-based interventions, and bystander-based interventions.

Organizational Level Interventions
Strategies for prevention of workplace bullying are most effective at the

organizational level of intervention (Gillen, et al, 2017). There are several situations that are especially ripe for the development of workplace bullying. Bullying is more likely to happen if there is an implicit approval granted by the organization's culture. Negative behaviors spiral into bullying and a toxic organizational culture develops because of leadership's unwillingness to address the issue (Harvey, Treadway, and Heames, 2007; Brodsky, 1976). Culture is evidence of an organization's decision-making and its values structure. Cultures evolve as a result of leadership and how the organization's values are animated. Organizations that experience widespread bullying should look at culture, leadership, and values as a way to understand the source of the behavior, assessing whether the organization's values and leadership encourage a culture of feedback and standing up for oneself.

Poor conflict management skills have been cited as a cause of workplace bullying (Baillien, Neyens, De Witte, & De Cuyper, 2009; Einarsen, 1999; Vartia, 1996; Zapf & Gross, 2001). It stands to reason then that augmenting the skills of managers and co-workers in this area can help to address workplace bullying frequency, severity, and repercussions.

Other organizational level variables that contribute to bullying include growing

diversity, increasing geographic dispersion, inexperienced managers, those situations where role clarity is lacking, and when the organization is undergoing significant change or consolidation are prime openings for instigators to begin bullying (Harvey, Treadway and Heames, 2007). Addressing these scenarios as a preventative strategy yields the strongest results. As OD practitioners, it is especially important

explaining this policy. However, only 6% of employers in the United States have such a policy and enforce it despite it being one of the most successful mechanisms to address workplace bullying (Namie, 2014). Updating an organization's harassment policy to include bullying can be a first step.

Creating appropriate on-boarding processes where organizational policies rele-

leaders need to let go of their way of doing the tasks and allow their team to develop its own norms. New managers may bully their team into conducting work as they did prior to promotion. This is why appropriate supervisory professional development is helpful in preventing this dynamic. Further, organizations that create training opportunities for, and use, an authentic leadership model have a greater chance of reducing incivility and enhancing trust (Read & Spence Laschinger, 2015). Embedding an authentic leadership model in soft skill courses offered to individual contributor and all levels of leadership reinforces the organization's culture.

.. . . it is reasonable to assume that some new supervisory employees use their promotion as an opportunity to exercise their power in ways to belittle and control others. Attending a course targeted at employees transitioning into leadership for the first time can help re-frame their mindset into that of a leader, moving from doing the task to managing the person. New leaders need to let go of their way of doing the tasks and allow their team to develop its own norms. New managers may bully their team into conducting work as they did prior to promotion.

that we be aware that stressful situations such as those listed above can produce negative behaviors in individuals.

In this example, the Instigators viewed the "reporting" teacher as monitoring their work and behavior which was very threatening and creating an issue of role clarity.

In May of 2006, while teaching 4th grade, I witnessed two of my team members bullying several other teachers. They were purposely and maliciously trying to get them in trouble and/or keep them off-balance with their antics. I couldn't stand it anymore. I went to speak to my principal in a closed-door meeting. Apparently, one of them was outside (the principal's) door listening to my conversation. (The instigator) started knocking on the door. When my principal didn't answer, she walked right in screaming at me. From that moment on, I was the new target.

Organizations looking to address workplace bullying should develop a policy prohibiting it, creating mechanisms for grievance should it occur, and thoroughly

vant to civility can be clearly discussed with new employees, addressing both what to do if an individual should become a target or if he or she should witness workplace bullying (Klein & Polin, 2012).

Supervisory transitions and the addition of new employees are also likely situations for the developing of workplace bullying. Implementing leadership courses targeted at employees who are currently a manager of others or transitioning to the next organizational level of leadership, can introduce soft skills needed to assimilate new members to the team. Additionally, providing a mentor or preceptor to a new employee can help reveal unspoken organizational culture issues and may help avoid vulnerable new employees becoming targets. Further, it is reasonable to assume that some new supervisory employees use their promotion as an opportunity to exercise their power in ways to belittle and control others. Attending a course targeted at employees transitioning into leadership for the first time can help re-frame their mindset into that of a leader, moving from doing the task to managing the person. New

Civility, Respect and Engagement in the Workplace (CREW) interventions launched through Department of Veteran's Affairs (VA) in the United States transformed the culture enough to produce a small, quantifiable increase in civility. CREW interventions are not consistent between sites of the VA, but typically involve trained facilitators working with groups of individuals while encouraging communication, assisting with problem solving, and creating an environment for mutual respect (Gillen, Sinclair, Kernohan, Begley & Luvben, 2017).

One study has indicated (Balducci, Cecchin and Fraccaroli, 2012) that one of the primary reasons that an instigator chooses a target in the workplace is a misunderstanding of roles. While there is no research that directly supports role clarification exercises as the most effective interventions in workplace bullying situations, the nature of the intervention directly addresses the stated problem. It may be wise to conduct a role clarification exercise with the parties in separate rooms or at staggered times. Instigators should be subject to disciplinary action should any organizational policies be broken, including transfer to a new unit or separation from the organization.

Another study by Baillien, Griep, Vander Elst & De Witte (2018) shows that the pressure of organizational change may trigger bullying episodes by creating added pressure or breaching a psychological contract with the instigator. Mounting stress about job security, expectations of the

organization, or the disruption of change can trigger an individual to lash out at others and workplace bullying can readily develop out of these pressure-cooker atmospheres. Developing an intervention that addresses how to navigate oneself through change can mitigate the stress associated with the disruption of change, potentially alleviating the pressure associated with the stress and anxiety of organization change.

Lastly, in assessing leadership at the organizational level may result in the need to implement the use of an authentic leadership style that can help prevent bullying (Laschinger, Wong, & Grau, 2012; Read and Laschinger, 2015).

Third-Party Intervention/Conflict resolution interventions for reconciliation with target and OD practitioner. This step should only be undertaken if the target desires. If the instigator has been separated from the company, there may be lingering resentment against management, bystanders or departments, such as Human Resources, which the target may believe should have intervened.

Provide a safe way of raising concerns and gaining support and include process for doing so in stated policies. Encourage employees to address the issue directly if comfortable to do so. Employees may speak with their manager, Human Resources, or employers can provide a confidential phone number by which an employee can file a complaint.

A culture of zero tolerance is needed, i.e., challenging bullying behavior must become everyone's responsibility, not just that of the target (Paice and Smith, 2009). Employers can include expectations within policies regarding what bystander intervention actions and steps to take in order to mitigate a bullying situation (Klein & Polin, 2012).

Conduct a post-event assessment to determine what can be learned and incorporated into subsequent action and policies. This assessment may uncover that the instigator was enabled by the culture of the department in which they worked, which may warrant further investigation of the department's leadership team. Often these investigations may reveal the need to upskill the leader, provide feedback on the

Table 2. *Organizational Level Interventions*

	Prevention	In-Process	Post-Event
Organizational Level Interventions	Develop a policy statement about workplace bullying, including "speak up"? Create a formal mentorship program to help orient new employees to the organizational norms. Create a formal supervisory professional development program to explain appropriate uses of supervisory control, including the use of authentic leadership practices. Prepare for the potential of workplace bullying episodes during organizational change processes. CREW Supporting the use of Authentic Leadership Practices, the growth of Emotional intelligence and the development of interpersonal skills. Augment the conflict management skills of employees through a robust training program.	Conducing a role clarification exercise with the target and the instigator. Third-Party Intervention/ Conflict resolution. Supporting the use of Authentic Leadership Practices.	Conduct a post event assessment to determine what can be learned and incorporated into subsequent action and policies. Third party intervention for reconciliation with target and instigator. Conduct a cultural analysis to determine what factors in the culture allowed bullying to occur. Investigate the values of the organization to understand if or how they are enacted. Determine how leadership style may have influenced the events associated with workplace bullying.

Table 3. *Target Level Interventions*

	Prevention	In-Process	Post-Event
Target Level Interventions	Explain bullying policy during onboarding which provides resources and appropriate steps to manage the issue. Assign mentors to acclimate new hires to the organization and provide a sense of psychological safety.	Conducing a role clarification exercise with the instigator and OD. Third-Party Intervention/ Conflict resolution. Create dyads of support for the target and non-involved bystanders. Augment the target's conflict management skills through a robust training program.	Consideration of affective/ emotional issues and how these issues may affect emotional well-being, continuing motivation and retention. Third party intervention for reconciliation with target and OD practitioner.

leader's style, the culture they are enabling within the team which allowed workplace bullying to occur.

Target Level Interventions
Target-level knowledge of what the organizational policies are, as well as the kinds of remediation available to managers and targets, can work toward reducing the perpetration of workplace bullying. By ensuring that all employees have an idea of what the policies and procedures are relevant to workplace bullying and managing a problem such as this one (Klein & Polin, 2012). Implementing an annual refresh intervention can reinforce not only the policies but also the remediation available.

Providing an experienced mentor to a new hire can help that individual become more aware of the organizational culture and thus less likely to become a target of workplace bullying. In addition to having multiple organizational benefits for development, assigning new hires a mentor can help insulate them from workplace incivility and increase retention (Frederick, 2014).

Consideration of affective/emotional issues that have impacted the target throughout the bullying and how these issues may affect emotional well-being and continuing motivation for workplace goals. In addition, the target may have residual anger toward those in a position to have stopped or addressed the bullying situation but did not do so. Addressing these unresolved issues might involve reconciliation activities (McCoullough, Pedersen, Tabak & Carter, 2014).

As many bullying issues are predicated on a misunderstanding of roles, conducting a separated role clarification exercise with the target, instigator, and OD may help create some clearer boundaries and delineate what each individual is responsible to do (Balducci, Cecchin and Fraccaroli, 2012). This could take the form of a formal role clarification exercise or even a third-party intervention or conflict resolution exercise. Since 56% of instigators are potentially the boss of the target, assessing their skill level may reveal the reason for the misunderstanding.

Table 4. *Instigator Level Interventions*

Instigator Level Interventions	Prevention	In-Process	Post-Event
	Explain bullying policy during onboarding.	Conducing a role clarification exercise with the target and OD.	Consideration of triggers for future episodes.
	Delineate expectations for supervisory behavior at on-boarding or at promotion, promote strong interpersonal skill development through the use of a leadership training program.	Third-party intervention/conflict resolution.	Consider a unit transfer for the instigator.
		Expressive writing.	Consider separation for the instigator.
		Disciplinary action.	Third party intervention for reconciliation with OD practitioner and instigator.
		Provide multiple sources of feedback so the instigator may be able to recognize his/her behavior as bullying and provide coaching as necessary.	Consider engaging in self-awareness raising activities to better identify triggers for bullying behavior.
		Remove the instigator from positions of control over the target and resources.	
		Augment the instigator's conflict management skills through a robust training program.	

Instigator Level
Strategies for managing bullying while it is in process requires tremendous tact. While some bullying is based on a confusion about roles, some about stress regarding organizational change, and still others is about power and control.

Ensure that the bullying policy is explained during the on-boarding period so that the expectations are set up front about how to treat one another in the workplace (Klein & Polin, 2012).

Create expectations for how supervisors and coworkers should treat one another and promote the practice of authentic leadership. Authentic Leadership focuses on:
» **Self Awareness:** To what degree is the leader aware of his or her strengths, limitations, how others see him or her, and how the leader impacts others?
» **Transparency:** To what degree does the leader reinforce a level of openness with others that provides them with an opportunity to be forthcoming with their ideas, challenges, and opinions?
» **Ethical/Moral:** To what degree does the leader set a high standard for moral and ethical conduct?
» **Balanced Processing:** To what degree does the leader solicit sufficient opinions and viewpoints prior to making important decisions?

There are individual development assessments, such as the Leadership Practices Inventory Emotional Intelligence frameworks and Authentic Leadership approaches can help individuals to develop their softer interpersonal skills and thus prevent bullying (Meirs, 2018; Spence Laschinger & Fida, 2014; Bowles & Bowles, 2000). However, the suggestion that perpetrators simply need training on emotional self-regulation is viewed with well-deserved skepticism by several researchers (Jensen & Raver, 2018). They imply that an individual who is engaging in bullying behaviors is unlikely to change them in response to a training seminar (Cortina, Rabelo, and Holland, 2018; Jensen and Raver, 2018).

In many workplace bullying situations, the instigator uses the balance of power or resources to control the target (Bartlett and Bartlett, 2017). Encourage the idea of standing up for oneself and others through use of a feedback model as well as removing the instigator from positions of control

over the target (Paice and Smith, 2009). Removing the instigator could take the form of a unit transfer or separation for the instigator for violation the policies surrounding bullying.

A successful intervention for instigators of bullying has been noted as expressive writing. However, there was not a reciprocal benefit for the target of bullying using expressive writing (Gillen, et al, 2017). Expressive writing is a daily commitment to write about your emotional state and feelings without the writer concerning his or herself with proper format, punctuation, and usage. The purpose is simply to express an inner emotional state. Interestingly, while expressive writing, which focuses on the expression of inner emotional states, has produced some reduction in instigators perpetrating bullying, cognitive behavioral interventions have not produced similar results (Gillen, et al, 2017). While not directly an OD intervention, expressive writing seems to help with self-regulation within the construct of emotional intelligence and thus is a recommendation that builds emotional intelligence and thus reduces workplace bullying.

Paice and Smith (2009) recommend that multiple sources of feedback be given to the instigator to help him/her recognize their behaviors as bullying and then receive coaching for modifying their behavior. Having multiple sources for behavioral feedback increases its perceived validity and may drive motivation for change.

As this article addresses post-event reconciliation, it should be noted that reconciliation does not mean encouraging contact, re-connection, or a relationship between the instigator and target. Reconciliation, in its broadest sense is about creating a sense of acknowledgement, validation, justice, and fairness so that both parties may move forward in a positive direction (McCollough, Pedersen, Tabak & Carter, 2014). though, very likely, quite separately.

Further, in an effort for an instigator to understand his/her environmental triggers around bullying behavior it might be wise for him/her to engage in some level of introspection and self-awareness activities. This could include expressive writing

Table 5. *Bystander Level Interventions*

	Prevention	In-Process	Post-Event
Bystander Level Interventions	Explain bullying policy during onboarding. Encourage individuals to speak up should they see inappropriate conduct.	Offer the target support in group settings. Through organizational policies, empower bystanders to speak up in situations where there is injustice. Provide pre-prepared responses to bullying episodes that bystanders may witness. A.R.T. Create dyads of support with the target and non-involved bystanders.	Congratulate bystanders who stood up to an instigator.

as discussed or other self-awareness raising types of activities.

Bystander Level Interventions
Bystanders who witness bullying episodes can be encouraged to intervene with comments such as, "I don't believe that is appropriate," as a mechanism to diffuse and re-direct the instigator (McNamara, 2012). Paice and Smith (2009) encourage bystanders to challenge bullying behavior as a part of a zero-tolerance culture. Implementing expectations regarding the regular use of feedback, and the need for employees to speak up can support.

A.R.T., while created as an Anti-racism Response Training Program, has much potential to address workplace bullying behaviors as well as other anti-social behaviors like racist behavior. A.R.T. is a mechanism to heighten people's awareness, behavioral awareness of others, and ethical commitment (Ishiyama, 2000). The A.R.T. approach uses a skills-training format to enhance readiness to respond to anti-social, racist situations cognitively and behaviorally and to empower otherwise passive bystanders to become more active and vocal. This approach is readily adaptable to workplace bullying. A.R.T. has four stages of witnessing:
» dis-witnessing, characterized by denial and avoidance

» passive witnessing, characterized by silently acknowledging that what is happening is wrong, but no outward stance is taken
» active witnessing, and expressing non-support and objections to the instigator and demonstrates support for the target
» ethical witnessing with social action, characterized by moving beyond the immediate issues that were witnessed and action is focused toward the larger organizational or institutional problem at hand.

Encourage bystanders to actively witness bullying behavior that they see in others. According to California Department of Fair Employment and Housing, an employer may also provide bystander intervention training that includes information and practical guidance on how to enable bystanders to recognize potentially problematic behaviors and to motivate bystanders to take action when they observe problematic behaviors such as workplace bullying, but can also extend to other sorts of negative interactions, such as harassment and racial issues. The training and education may include exercises to provide bystanders with the skills and confidence to intervene as appropriate and to provide bystanders with resources they can call upon that support their intervention.

Finally, offer congratulations and recognition to bystanders who stood up to an instigator

Workplace bullying, is a complex and intractable issue, however it can be mitigated by using some of the tactics presented in this article. While not exhaustive and further research needs to be done on specific interventions to address workplace bullying, this article represents one of the first compilations of OD research-supported approaches to managing this all-too-frequent problem.

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"... at a Board retreat, several members of the agency's A.I. steering committee guided improbable pairs of Board members through strength-based conversations and then facilitated both small group and full-Board reporting out on common themes and wishes. The outcome of these conversations was nothing less than revelatory for those in attendance."

Appreciative Inquiry Comes to the Achievement Center

By Bob Gulick,
with Leslie Yerkes

The Achievement Center is a mid-sized non-profit organization guided by a Board of Directors comprised of local business and community leaders. Serving the developmental and mental health needs of more than 3000 children annually, the Achievement Center has been in operation since 1923. The agency provides Early Intervention, Blended Case Management, Community-based Mental Health, Outpatient Mental Health, and Medication Management services across six counties located in northwestern Pennsylvania. Its employees number more than 250 and include physicians, Bachelor and Master level clinical staff, as well as skilled administrative staff to support its operation.

For the past several decades, economic and political forces at the county, state, and federal level have made the management of non-profit service agencies increasingly difficult in the state of Pennsylvania. Reimbursement rate increases that do not keep pace with costs, increasingly stringent regulations that make quality service delivery a mounting challenge, and the ever-shrinking pool of qualified candidates for clinical positions, created a fiscal crisis for the Achievement Center in 2013 that resulted in a substantial administrative workforce reduction.

Following on the heels of significant layoffs, the agency's administration took a very hard line on clinician productivity as a means of further shoring up its financial situation. Since the agency had never consistently held clinical staff accountable for low productivity, this new tactic was met with considerable staff resistance.

Exacerbating the situation was the highly punitive approach to correcting the productivity and morale problems adopted by the agency's Human Resources department. Morale plummeted and the agency experienced a steady exodus of clinical staff over the next several years. Additionally, the various departments within the agency reacted to this atmosphere of fear and uncertainty by insulating themselves within clearly demarcated silos—with the goal of keeping their head down and protecting "their own."

In 2016, the agency underwent a change in leadership. The Board of Directors selected Charlotte Rerko, a CEO they felt possessed the qualities necessary to guide the agency through a process of healing. Charlotte brought with her an air of positivity and held as her mantra the following charge, "we need to take care of the people who take care of the children." Over the ensuing months, her approach of "managing by walking around," improving staff wellness, and listening to all team members led to a slow but cautious improvement in morale.

To more formally advance the healing process, our new CEO contacted Leslie Yerkes to consult with the agency's administration. Leslie began work with the Achievement Center in 2017 and arranged for a contingent of agency administrators to attend a 3-day Appreciative Inquiry workshop being conducted by Dr. Mark Chupp at Case Western Reserve University in January of 2018.

The three staff who attended the workshop returned to the agency with a good

amount of the Define and Discovery work already under their belts. They defined the focus of the A.I. process for the Achievement Center as "Empowered Service Delivery." This focus embodied the agency's mission of serving children but also spoke to the need of the agency's staff to be heard. The opening propositions that sprung from the work completed at Case Western and brought back to the agency echoed that dual purpose.

committee. Meetings were held throughout the spring and summer of 2018 and progress was slow.

In retrospect, it would have been better had the A.I. team returning from Case been more sensitive to the very real fact that the organization was tired. It was still reeling from the trauma visited upon it by the previous administrative approach and now its leaders were knee-deep in reframing its strategic plan and trying to move

Additionally, a faction of the Leadership Team included non-clinical professionals—those whose day-to-day duties fall within the realms of operations, finance, or human resources. Lacking the clinical counseling and interviewing skills, many of these leaders expressed some level of anxiety in conducting the Discovery phase. Many stated that they had doubts as to their ability to coordinate the interviews with improbable pairs and then facilitate the ensuing small group discussions. Cindy Bonniger, Chief Operations and Privacy Officer, described the feeling at the time. "It was so different from how we had interacted in the past. Initially, it was difficult for people to wrap their heads around it." It is interesting to note that this group of worriers was very amenable to support and feedback from the A.I. team and came around and embraced A.I. much faster than their clinical counterparts. In several instances, members from the administrative *side* became the most fervent practitioners of A.I. during the first year and to this day continue to champion the work. Amanda Jenco, our Director of Human Resources summed up the benefits she observed. "As we moved through the process, just individually for myself . . . the growth . . . and looking at situations and circumstances completely differently . . . recognizing my interaction and presentation drives a lot of what people are feeling and how they are going to react or interact with me."

In retrospect, it would have been better had the A.I. team returning from Case been more sensitive to the very real fact that the organization was tired. It was still reeling from the trauma visited upon it by the previous administrative approach and now its leaders were knee-deep in reframing its strategic plan and trying to move the agency ahead as a trauma-informed provider. It is not surprising that much of the leadership initially viewed A.I. as yet another task to complete on their never-ending To Do Lists.

» Our agency has recently experienced new opportunities for growth and change.
» Positive change is possible when we embrace our vision and work together.
» Decisions regarding change spring from our mission and rejuvenate our hope for the future.
» Communication, flowing like a clear stream, carries the knowledge and experience that are essential to our vitality.
» Mutual respect and trust amongst ourselves promotes a positive and fun work life.
» Our passion and excitement is poured out as high-quality care for our children.

These A.I. ambassadors next met with the agency's Leadership Team which is comprised of administrative staff at the director and chief officer level. While immediately agreed upon philosophically by the leadership, the logistics of carrying out the Discovery, Design, and Delivery components of the process for the entire agency were not so easily settled by this steering

the agency ahead as a trauma-informed provider. It is not surprising that much of the leadership initially viewed A.I. as yet another task to complete on their never-ending To Do Lists. While the team returning from Cleveland was charged up and ready to run forward with A.I., the folks back at home were worn out and would be in need of some serious convincing.

The Achievement Center's Leadership Team at that time was comprised primarily of masters and doctoral-level clinical *experts* with very strong opinions about, and passions for, their work. While A.I. did not philosophically oppose those values, it may have represented to some a distraction; or, at worst, a threat to their current projects. It took some doing to convince this hard-working and dedicated crew that while they were experts in their respective fields, they had much to learn about Appreciative Inquiry. Moreover, it required those of us (not A.I. experts either) who had been fortunate enough to get a taste of what A.I could offer, to make the pitch to the leadership in a gentle and non-threatening manner.

Following an insightful recommendation from Leslie Yerkes in midsummer of 2018, the leadership was asked to read Torres and Stavros' *Conversations Worth Having* as a means of quelling their fears and clarifying their understanding of Appreciative Inquiry. Discussion of that book amongst the leadership had the desired effect and the steering committee was able to move into the planning stages for an agency-wide Discovery process.

The most important part of that preparatory process was for the steering committee to craft the interview questions for the improbable pair interviews. The committee came up with three general statements with several questions related to those statements.

1. The Achievement Center is constantly evolving. Our Strategic Plan values of "well-being, integrity, compassion, collaboration, and inclusion" shape the mission and direction the agency takes.

A) Why do you work at the Achievement Center?

B) Can you tell me a time when you felt especially proud to be an employee of the Achievement Center?

C) What do you value most about the positive relationships you have with your clients or coworkers?

D) What is something that you would like other employees to understand about what it is like to be you at the Achievement Center?

2. The Achievement Center strives to empower each employee, instill confidence, and encourage all staff to have and share their voice.

A) Describe a time when you have felt empowered at the agency to make a change or improve some aspect of yourself, your work, or the organization.

B) What made it possible for you to feel empowered?

C) What values, themes, or important ideas do you remember about this experience?

D) What strengths of the agency are represented in your experience?

3. Think of the future of the agency and imagine what it would look like if the atmosphere reflected our values and provided for open communication and trust amongst all employees.

A) What would the agency look like with value-based open communication?

B) What would people be saying about the Achievement Center?

C) What are you currently doing to support these values?

D) What are some other things you could do in the future to support these values?

During the months of August and September the steering committee leaned heavily on the agency's Executive Assistant, Heather Salter—who is an organizational titan and therefore was a godsend to any

such endeavor. Coordinating with Human Resources and the steering committee, she was able to arrange 250 employees into improbable pairs and then schedule interview sessions across three All Staff Meetings that occurred in early September. The members of the steering committee were then each assigned as facilitators to one of the 21 small groups comprised of several sets of improbable pairs. Heather doggedly tracked down RSVPs from all staff and was able to confirm nearly a 100% response more than a month in advance of the event.

On September 12, 2018 the agency held three separate All Staff Meetings at the main agency (two additional meetings were scheduled at later dates—one for the regional county offices and one as a make-up meeting for those who were unable to attend the September 12 date). Again, nearly 100% attendance was attained and the process proceeded with minimal difficulty.

The positive response from the previously anxious leadership team members was overwhelming. Several members actually asked to facilitate additional groups or volunteered to participate in the regional and make-up sessions being held later that month.

The final organizational touches placed on the Discovery sessions were to ensure that each small group had identified themselves with a name, had developed common themes and wish lists from their facilitated conversations, and identified a spokesperson to report out at the Summit planned for the following month.

As with the facilitators, the employee participants' responses to the process were overwhelmingly positive. Marje Koehlert, Care Coordinator Supervisor, noted that it was "enlightening to see how committed she (her improbable partner) was to doing a good job at the agency and doing a good job with kids . . . and just to know that there was someone else out there that I didn't even know existed who also is working toward the same kind of goals that I am."

Quickly following the completion of the Discovery sessions, the steering committee led by Heather dove into planning the logistics of the Summit. It was hoped

from the start that the A.I. Summit would piggyback on an employee appreciation event held for all staff (regional and local offices). The general structure, quickly agreed upon, was to conduct the Dream, Design, and Delivery phases of A.I. during the morning hours, thus leaving the afternoon for lunch and a variety of appreciative activities for the staff.

Selection of the venue for the Summit was critical and so was one of the first components of planning to be confirmed. The agency was able to gain access to a local university's student center during a midterm break—thus reducing interference from non-agency individuals or activities in the building. A ballroom was identified within the student center and set up much in the same way as would be seen for a wedding reception. Round tables to accommodate each of the 21 small groups were marked with the name and visual logo associated with the group so attendees could easily find their seat upon entering the room. Tables were also equipped with all necessary art and craft materials for the Dream phase's required visual representation of their themes.

Special attention was given to selecting the self-care and wellness activities for the afternoon sessions. The agency was able to contract at little or no cost for the following activities:

» Zumba
» Exercise
» Drumming circle
» Manicures
» Fall craft project
» Guided painting-on-wood project
» Coffee bar
» Indoor leisure (pool, corn-hole, and putting greens)
» Nutritional specialist presentation

The detail and organization that went into developing the registration process was critical to ensure that each employee had identified his/her group and seating, had made a selection of two afternoon activities, and had selected an event T-shirt.

The morning session was kicked off by a welcome from the CEO and one of the steering committee members. The 21 groups were then led through the art

activity of the Dream phase—having them reconnect with their themes and ideas generated nearly a month before. It was amazing to watch a room full of adult professionals embrace this activity with youthful abandon and produce such whimsical yet clear representations of their dreams for the agency.

Crafting of provocative propositions forced the groups to move from the visual to the verbal realm and as such was met with some hesitation. With help from the roaming facilitators (steering committee members) though, each group was able to

participants were guided to a grassy area outside of the student center where they were arranged (based on the color of their T-shirts—cleverly distributed to staff in the correct proportion) in a human depiction of the agency's kite logo. This final demonstration of solidarity was then filmed via a drone flying above the field.

I think it is safe to say that even the most skeptical members of the Leadership Team were surprised at how smoothly the Summit ran and how intentionally and deeply the agency staff at all levels participated in the day's activities. Each level of

participants in the Strive to Soar Summit to gain their opinions as to prioritizing the more involved design ideas prior to implementation. The results of that survey identified these three projects:

» Develop a complex case coordination team to improve interdepartmental communication and clinical collaboration
» Develop a staff training department
» Expand the existing employee appreciation team to include direct line staff.

86% of the Strive to Soar Summit participants polled in January 2019 stated that they wanted to be involved in the advancement of the three highest priority design projects identified at the summit. Cross functional teams—including some of these employees—are presently being established and the employee appreciation team has already received six new direct staff members.

Senior Leadership continues to challenge itself to remain open and positive in working out the logistics and composition of these workgroups. At times, we have found it is easy to slip back into the old mindset that puts such a high bounty on productivity and billable hours or quibble over the expense of paying a $13-an-hour direct line staff to attend a non-billable workgroup meeting once a month. It is so critical to continually check yourself when the old problem-solving and root cause analysis mode tries to kick back in.

It is slowly becoming apparent to Leadership that the A.I. *process* is not a process after all. Appreciative Inquiry is a philosophy, a way of perceiving our world at the agency, which is interwoven with the very fibers of our values and expressed every day in the kind and loving language that we choose to use when speaking and working with each other.

articulate many deeply felt and poetically stated propositions.

Following a brief break, the groups were guided through the Design and Delivery phases of A.I. Several of the more interesting and creative ideas included:

» Establishing an agency "Uber" to assist needy families in making appointments in the Out Patient clinic
» Scheduling staff wellness activities
» Creating an "Appreciation Café"
» Offering regular cross training and opportunities for regular communication between departments
» Establishing a complex case coordination team
» Appointing direct staff representation for process action teams.

The morning's activities ended with most staff appearing to have enjoyed the interaction—but perhaps a bit tired, following the intense work in which they had just engaged. Again, Marje Koehlert observed "It was fun, invigorating, and also exhausting!"

At the end of the day, following the afternoon's wellness and fun activities, all

the process from improbable pairs, to small group facilitation, to the full-blown summit left the original members of the A.I. Team who bore this gift back from Case Western in a state of amazement. In spite of resistance and logistical barriers, the initial phases of Define, Dream, Discovery, and Design each took on an organic life of its own and we found ourselves just standing back and gazing with wonder as they unfolded before us.

In the weeks that followed the Summit, the steering committee members aggregated the design data collected, archived the visual artwork, and prepared to report out to staff and management on the outcome of the event.

The artwork produced during the Dream phase was photographed and arranged into large poster frames. These were then distributed to all agency offices and displayed prominently.

An analysis of Design and Delivery data revealed 39 viable design ideas developed by the small groups in attendance. These ran the gamut from "low hanging fruit" to more complex and costly ventures. The leadership then surveyed all

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Fiscally, we have come to the realization that the dollars invested in the simple act of giving a few staff a voice in how we get things done or complete new projects can often go a long way in enriching our relationships with those staff and retaining them in our employ for a very long time. There also exists the huge benefit

of tapping into additional creative minds when embarking on new initiatives.

The high level of energy and excitement created by the Strive to Soar Summit generated many immediately obtainable projects, such as:

» A "Cheers for Peers" bulletin board in all offices where employees could write brief affirmations of, or kudos to, their colleagues for all to see as they entered the building.

» Changing the language in the agency's hiring interviews and transforming the interview process into more of a conversation with candidates.

» Changing the language in the agency's template for monthly 1:1 supervision (between managers and their supervisees) to include more strengths- and values-based questions as well as probes into the use of positive reframing of potentially divisive conversations.

» Changing the language of how financial discussions on productivity are conducted—talking more of an employee's "break even" status rather than his or her "meeting the productivity standard"—essentially providing direct staff a higher-level view of how their revenue generation affects the agency as a whole.

» Clinically, some departments have embraced the strengths-based nature of A.I. and have made adjustments in some of their interviewing processes used with clients and families, as well as in how they craft the language used in writing treatment objectives.

A side note that must be mentioned is that the Discovery process was also conducted with the entire membership of the Achievement Center's Board of Directors. In February 2109, at a Board retreat, several members of the agency's A.I. steering committee guided improbable pairs of Board members through strength-based conversations and then facilitated both small group and full-Board reporting out on common themes and wishes. The outcome of these conversations was nothing less than revelatory for those in attendance. Commonalities and heretofore unknown connections were discovered that led to deeper conversation and relationships being forged among the members. One clear resolution that came from this experience was their pledge to be more inquisitive and open in learning about each other as their time on the Board moves along. Something as simple as name cards placed at seats to identify new and old members was suggested as well as the possibility of shuffling the placement of those name cards at future meetings to occasion new and enriching conversations. Following their brief A.I. exposure, the Board has since demonstrated even greater levels of energy and positive support for the agency to which they have always committed their hearts and minds.

Looking back on the year that has passed since the agency was first introduced to Appreciative Inquiry, much has changed. One cannot help but marvel at how quickly that year has gone by and yet, the positive strides forward made by so many employees across so many levels of the organization have set the foundation for real organizational change that will yield even greater benefits for many years to come.

When we talk amongst ourselves about what we have accomplished, we see how the power of our words has shaped a new way of *being* at work. Observations such as these are commonplace during the day-to-day management of the agency:

"There's a lot more listening going on these days."

"I see a lot more of general kindness and overall compassion . . . of people talking to each other more as a person rather than just someone who I need something from."

"I have also seen a lighter mood among staff . . . more trust, less suspicion between departments."

"I see changes in positive energy . . . people being more mindful."

"It's been powerful . . . it's guided a lot of people to have the courage to talk more openly."

Organizationally and operationally, there have been some rather striking metamorphoses.

Human Resources, that previously dreaded department, emerged from the cocoon as a butterfly, liberated by A.I. to realize its true mission—to "become a resource" to staff and not "the one who gets you in trouble." Amanda, our H.R. Director has worked tirelessly over the past year to collaborate with departmental Directors and Supervisors to bring supportive and positive language to Human Resources policies and procedures. Amanda recently made the observation that "there has just been an overall shift in what we (H.R.) represent."

In keeping with Charlotte's charge to "take care of those who take care of the children," we have transformed the process for conducting 1:1 administrative supervision with our staff. Injecting strengths-based questions into this interview has elevated the conversation out of the "run-of-the-mill" doldrums to a real reciprocal conversation between staff and supervisor that has yielded powerful insights and results for both parties involved. Hilary Hobbs, Director of Early Intervention Services noted that her staff "have been taken off guard by some of the questions we have put into our supervision . . . including 'How is your work/life balance?' and 'What do you value most at work?'" But, she reflected that A.I. "really is a philosophy that exemplifies our care in those areas of work/life balance and values and it leads us to purposefully talk about each of those things on a regular basis."

Generation of appreciative approaches has not been limited to managerial staff. Most recently, a clinician came up with the idea to include some strengths-based questions into the agenda of our group clinical supervision sessions. Since all clinicians are community-based, they work to a great extent in isolation from their peers or other sources of support. They rarely have an opportunity to share their successes or vent when having a bad day. We took her suggestion and added "What was the best thing that happened to you this week?" as a general question to be passed around the table at every group supervision. The avoidance of a Yes/No response by the structure of the question has encouraged the clinicians to open up and really talk about what motivates them and maintains the passion for their work. These sessions invariably

present a few of those "worst things that happened to me this week" scenarios, but these have routinely provided multiple opportunities to have your *problem* positively reframed and for support to be provided from a group of caring colleagues gathered at the table with you.

So, the year has been an emotional mix of worry, surprise, and wonderment. At times there was real trepidation amongst A.I. Team members about being able to get leadership to open up and accept the benefits that A.I. was capable of delivering. But A.I. is an amazing phenomenon. We found

possibly the most poignant self-reflection of the entire A.I. experience. "For me, the whole process has been an installation of hope . . . hope for things to be better . . . hope for things to change . . . hope for things to improve . . . hope for people to be happier at work." Thinking back to that cold January afternoon in Cleveland nearly a year and a half ago when our A.I. Team was crafting those provocative propositions, it is strange to think about how this whole process has come full circle. At Case Western, we wrote the words: "Decisions regarding change

I have chosen to work with leaders and organizations who value process and long-term, systemic change that must become woven into the fabric of the organization. Though the American market likes quick-fix, shiny new process toys, I have learned that good OD is a steady practice of tried and true methodologies that, if used consistently, will produce results.

Ken Blanchard, the prolific author and management consultant, once was challenged by a participant to share which of his many books would be the best to read for finding the 'right' answer. His response was, "Pick one and stay with it for over a year and you will create results. Any content is good content if used consistently."

Selecting the right process path is essential to the intervention. I also know that following through and maintaining the habits that come with the new abilities will create sustainable results. This causes me to work as hard on providing responsible guidance and direction, as well as stepping back and teaching the tools and letting the members of the client organization lead the process—with me as a coach on the sidelines.

Selecting the right process path is essential to the intervention. I also know that following through and maintaining the habits that come with the new abilities will create sustainable results. This causes me to work as hard on providing responsible guidance and direction, as well as stepping back and teaching the tools and letting the members of the client organization lead the process—with me as a coach on the sidelines. It is important not only to intervene but to leave the organization with the ability to own, lead, understand, and apply the process tools.

that when we were able to set aside those fears and just allow the process to happen, it did just that. It happened.

We sat down and really talked with our colleagues.

We were surprised with how much we were alike when it came to our core values.

We showed up and participated at the summit.

We had fun.

We met new friends.

We spoke with one voice and together planned our future.

Appreciative Inquiry at its most basic and pure level has allowed the employees of this once battle-weary agency to realize the power of words and embrace those daily opportunities that allow positive conversation to shape the space where employees can both love what they do and love where they work.

One of our Mental Health Services Supervisors, Yelana Lindenmuth, shared

spring from our mission and rejuvenate our hope for the future." Yelena's words echoed and affirmed our proposition and today, as she and all of our staff embrace the power of positive change brought about by Appreciative Inquiry, vision and hope at the Achievement Center have been rejuvenated.

Consulting Reflections from Leslie Yerkes, Consulting and Coach to The Achievement Centers of Erie

As I have evolved and aged in my practice of OD, my desire is to teach others tools and foster independent action and ability within my client organizations. I believe that one of the hallmarks of a good consultant and manager is not what people do when you are around but instead what they know to do when you are not around.

It is important not only to intervene but to leave the organization with the ability to own, lead, understand, and apply the process tools. Building internal capacity is the gift that will keep giving, enabling long-term, sustainable, systemic change.

My role in the life of The Achievement Centers of Erie is to support the senior leader as a sounding board and coach; to contribute to the creating of a unified and capable leadership team; and to support the development of managerial abilities to pursue healing, preparing, and strengthening the culture and organization in order to be able to navigate growth and change. I have introduced the processes of Appreciative Inquiry, the frameworks for Trust from Dennis and Michelle Reina and Emotional Intelligence, over the course of three years.

Together we select a small team of organizational leaders to learn the processes, introduce them to the leadership team, and design an organizational initiative to weave the content/behaviors into the day-to-day life of the organization to support daily work, strategic

planning, performance management, and client interactions.

The consultant's role is more of mentor, coach, and resource provider than of hands-on practitioner. The joy is helping the client learn how to do the work, respond to the challenges, engage the stakeholders, guide the process, and cheer their accomplishments.

I have found that every client needs a culture coach. Someone who will advocate for maintaining the focus on not just the technical 'WHAT' of their work but the important 'HOW' of what they are doing. When a balance of hard organizational science is matched with the softer science of OD, and that balance is maintained, so then will the health of the organization be sustained.

I believe that it is the role of an OD practitioner to be the coach and advocate for this balance. It is less about our doing things to our client systems and more about teaching them to do for themselves. The Achievement Centers of Erie understands this proposition well. It is a very rewarding partnership.

Robert (Bob) Gulick is a Board-Certified Behavior Analyst with over 35 years of clinical experience with both children and adults diagnosed with autism spectrum disorders. His work has included direct service and teaching of adults and children in residential, vocational, and educational settings; behavior specialist consultation to children in home, community, and educational settings: staff, teacher, and parent training; applied research in instructional methodology and language acquisition; and systems development in the area of early intensive behavioral intervention.

He presently serves as Senior Director of Staff Development and ABA Consultant at the Achievement Center in Erie, PA and has facilitated the use of Appreciative Inquiry and Trust-Building to affect organizational culture change at this non-profit community mental health agency.

Bob has served as an adjunct faculty in Mercyhurst College's graduate program in applied behavior analysis where he taught courses in functional assessment and functional communication training as well as providing mentoring and supervision to candidates for board certification in behavior analysis.

Bob's recent applied research efforts have been focused on the acquisition of higher language and social skills in children with ASD and the application of Acceptance and Commitment Therapy (ACT) to improve treatment integrity and the transfer of behavioral skills to parents. He is co-author of *Effective Instruction for Children with Autism*.

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Leslie Yerkes is President of Catalyst Consulting Group, Inc. (*www.leslie yerkes.com*) an organizational development and change management consulting firm based in Cleveland, Ohio founded in 1987. Leslie's business goal is to help people create sustainable organizations. Her life goal is to create a framework in which people can draw on their own resources to find creative solutions. Her clients have included Chrysler Corporation, The Cleveland Clinic Foundation, United Church of Christ, ArcelorMittal Steel USA, and NASA. A subspecialty of Leslie's is making non-profits healthy and sustainable.

Leslie is a recognized consultant, author, and speaker throughout the United States and Europe. She is considered an expert in her field and is frequently quoted in the media. She is the author of *Fun Works: Creating Places Where People Love to Work* and *Motivation in the 21st Century without Kicks or Carrots*, a co-author of *301 Ways to Have Fun at Work*; *Beans: Four Principles for Running a Business in Good Times or Bad*; and *They Just Don' t Get It! Changing Resistance into Understanding*. Her works have been translated into more than a dozen languages selling hundreds of thousands of copies worldwide.

A CumLaude graduate of Wittenberg University and Case Western Reserve University, she has taught at John Carroll University, Baldwin Wallace College, and is on the faculty at the Weatherhead Dively Center of Executive Education, Case Western Reserve University.

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"The organizational transformation generated by radical circles can be a way to transform an organization fueled by those who may know best—skilled employees from within the organization."

Radical Circles

Engines for Organizational Transformation?

By Bruce E. Greenbaum, Abraham B. (Rami) Shani, and Roberto Verganti

This study advances the understanding of radical circles as an engine for organizational transformation. Empirical data suggests that most corporate transformations do not accomplish their goals. Radical circles—powerful forms of secretive collaboration among rebels—may make it easier for leadership to reshape an organization's strategic vision and trigger transformation. We detail the process for organizational transformation through radical circles; offer guidance for leaders interacting with radical circles; and highlight challenges for managers regarding the nurturing of radical circles.

We have observed a path to organizational transformation originating from employees, not top management—a transformation that is not only conducted, but even activated, from the bottom of the organization. The activation we observed is triggered by a small group of individuals who voluntarily come together to agitate for and activate a change process. This group is identified as a radical circle (RC) (Verganti & Shani, 2016). The radical circle most often evolves from a small group of disaffected individuals driven to transform an organization's vision or business model. Often starting in secret, the "radicals" generate ideas and potential strategic solutions without the bounds of organizational change processes or ideation parameters. The organizational transformation generated by radical circles can be a way to transform an organization fueled by those who may know best—skilled employees from within the organization.

The evolution of the radical circle as a vehicle for change provides greater insight into the workings of this potentially powerful agent of change. The radical circle may be unique in identifying organizational transformation solutions from outside the bounds of more traditional approaches, but yet able to seamlessly integrate back into the organization's hierarchy once the change process is initiated. The literature on organizational transformation has begun to shed significant light on the work of non-traditional agents of organizational change, but often the focus has been on sole proprietors of change. For example, scholars and the business press are identifying employee change agents and characterizing them as rebels (Gino, 2018), troublemakers (Grant, 2016), positive deviants (Heracleous, Wawarta, Gonzalez, & Paroutis, 2019), and radicals (Grant, 2016). Our radical circle concept focuses on a group of individuals drawn together to agitate for change, rather than the lone rebel identified in the work of these other scholars. The pathway for organizational transformation may be forged by a radical circle.

Our observations on the power of radical circles as a mechanism for organizational transformation has been fueled by chronicling the results of radical circles in a variety of organizational settings. We have created a synopsis of case studies to capture the dynamics of the work of the radical circle in each instance of organizational transformation. Here, we provide overviews of the work of a variety of radical circles and illustrate the change process

	Activation		
		Top	Bottom
Institutionalization	Top	Cascading	Radical Circle
	Bottom	Empowering	Spin-off

Figure 1. Organizational Transformation—Institutionalizing and Activation Forces

engendered by the radical circle. First, we examine the evolution of organizational transformation processes through to the development of the radical circle.

The Spectrum of Radical Circles

Organizations face numerous challenges when seeking pathways for organizational transformation—from overcoming inertia to grasping the ever-changing environments in which the firms compete. Firms frequently attempt to change in the face of ongoing environmental turbulence but significant organizational transformation is extremely difficult to execute successfully. In their recent study, Reeves and colleagues examined the outcomes of corporate transformation during 2004–2016 with 300 companies across a variety of industries (2018). The authors demonstrated that a majority of organizational transformation efforts do not accomplish their goals. However, firms remain undaunted in their pursuit of new opportunities through organizational transformation, but are essentially navigating without a map.

Managers are confronted with a variety of roadmaps that aim to guide them through the treacherous waters of change, but as Anthony, Johnson and Sinfield explained in their article examining institutionalizing innovation, "there is no one-size-fits-all way to structure for innovation" (2008: 49). Given the challenge of no one-size-fits-all approach, we have seen change processes initiated from all perspectives of the organization: the top, the middle, and the bottom (Bartunek & Jones, 2017).

We believe that the radical circle is a mechanism through which organizations can refine firm strategic values (Shani,

Greenbaum, & Verganti, 2018; Verganti & Shani, 2016) and continue the pursuit of a competitive advantage while engaging valuable employees. We have seen the effects of individual or small groups of disruptors on organizational change through work such as Hamel's (2000) study of the transformation of IBM at the outset of the Internet age and Heracleous and colleagues (2019) examination of the influence of a small group of positive deviants on organizational transformation at NASA. Additionally, Meyerson (2001a; 2001b) examined the impact of the tempered radical and this informal leader's attempts to work alone in changing the conventional wisdom and provoking cultural transformation. The radical circle employs the bottom-up influence of these other examples, but incorporates the additional power of the diversity of multiple perspectives in the circle and a dedication to secrecy that is not consistently found in other approaches.

While much of the recent scholarship on agents agitating for change within organizations focuses on singular agitators, we have seen prior scholarship on the power of small groups to facilitate change. Farrell's (2001) book, *Collaborative Circles: Friendship Dynamics and Creative Work*, explores the creative collaboration concept by exploring various groups throughout history. Through the examination of groups such as the Impressionists, founders of psychoanalysis, the women's rights movement, and others, Farrell defines a collaborative circle as "a primary group consisting of peers who share similar occupational goals and who, through long periods of dialogue and collaboration, negotiate a common vision that guides their work" (2001: 13). While the collaborative circle shares certain

elements as the radical circle, we believe our concept differs significantly from Farrell's idea. In particular, the origin, duration, and outcomes of the collaborative circle differ significantly from the work and output of the radical circle.

Radical Circles in the Sea of Organizational Transformation Orientations

What is unique in radical circles and how do they differ from other frameworks for organizational transformation? Academic research has indeed identified a number of organizational transformation processes (Bartunek & Jones, 2017; Pasmore, 2015; Wischnevsky & Damanpour, 2006). Beyond academia, we see a variety of organizational change approaches targeting practitioners, including future search (Weisbord & Janoff, 2010; Weisbord, Weisbord, & Janoff, 2000), skunk works (Peters & Waterman, 1982) and World Café (Brown & Issacs, 2005; Jorgenson & Steier, 2013).

These academic and practitioner works assert that any process of organizational transformation requires some kind of involvement of different levels of an organization, both in terms of leadership and engagement of employees. Yet, there may be significant differences in the dynamics of the process that explain which mechanisms are best suited to address rapid transitions in the context. In particular, *Figure 1* enables us to clarify the uniqueness of radical circles, by classifying those approaches according to two fundamental dimensions: activation and institutionalization:

» Who *activates* the transformation process, i.e., whether the perception of the need to change and the ignition of the change process comes from the top of the firm or the bottom or from the middle out;
» Who *institutionalizes* the change, i.e., whether the formalization of the change process into the organization and the management of the change process once it is institutionalized comes from the top or the bottom.

The first category of the organizational transformation forces is *cascading* (the

upper left corner of the *Figure 1*): change activated from the top and institutionalized from the top. Organizations may be facing increasing pressure on performance in a stable environment and seek targeted organizational improvement. With a more stable environment, change is likely activated by top executives, as they may be in the best position to perceive a need for change. The change process is then institutionalized into a change program that is cascaded down to the firm. Participation is often appointed by leadership and the targeted outcome of this change process is most often organizational improvement.

Through the examination of groups such as the Impressionists, founders of psychoanalysis, the women's rights movement, and others, Farrell defines a collaborative circle as "a primary group consisting of peers who share similar occupational goals and who, through long periods of dialogue and collaboration, negotiate a common vision that guides their work". . . While the collaborative circle shares certain elements as the radical circle, we believe our concept differs significantly from Farrell's idea. In particular, the origin, duration, and outcomes of the collaborative circle differ significantly from the work and output of the radical circle.

One example of this incremental improvement process is the Swedish manufacturing giant ABB instituting an organization-wide transformation process centered on reducing cycle times through a process named "T 50" (Mitki, Shani, & Stjerberg, 2000). ABB's CEO Percy Barnevik led the effort by empowering all managers to cut all cycle time by 50% within three years. Senior managers were given all the needed resources to manage the process and had to report progress periodically. All managerial periodic reviews had to address challenges and progress towards the accomplishment of the T-50 objective. The increase in capacity by 50%, coupled with the decision not to let go of any employees, resulted in the creation of an innovative culture that enhanced employee retention throughout the company (Mitki et al., 2000). The

success of the program ultimately served as a model for other firms, with ABB's CEO appointed to boards of directors of firms such as Volvo and General Motors to trigger similar initiatives.

The second category of the organizational forces is *empowering* (the bottom left of *Figure 1*). Companies may be seeking company-wide incremental change. The activation process is still initiated by top executives, but the orchestration of the process is greatly diffused to the bottom of the organization—institutionalization of the change process is dependent on input and leadership from lower levels of the organization. Ultimately, firms may be seeking culture change and empowering employees to contribute creatively to that process may be highly effective.

For example, another inspirational CEO, Jack Welch of General Electric, created the "Work-Out Program" to generate transformational ideas from throughout GE (Wozny & Barlett, 1999). The Work-Out Program solicited ideas and attempted to change GE's culture through New England town hall-style meetings that solicited ideas and identified problems through feedback from all levels in the company—something previously tamped down by GE's conservative, bureaucratic culture. The program has often been characterized as a "bottom-up" transformation process. However, the inspiration and motivation for the process was directed by one person, Jack Welch, from his position at the top of the

organization—but the visionary approach empowered all levels of the organization to be meaningful originators, contributors and managers of the change process.

So, whereas ABB and GE differ in the extent to which change was orchestrated from the top down or from the bottom up, both cases relied heavily on the capabilities of each company's CEO to recognize a need for change and set a direction. Change was activated from the top.

We identify the *spinoff* as the third category of our organizational transformation matrix (the lower right quadrant of *Figure 1*). The motivation may likely originate from employee-generated ideas not being supported or aligned with their firm's current or future strategic vision. Participation in this process is essentially predetermined by the makeup of the employee group that generated the rejected idea. The ultimate goal is a decoupling of the idea-generating group of employees from the organization.

For example, IBM failed to recognize the strategic benefits of the enterprise resource planning ("ERP") software package SAP. A small group of five IBM software engineers developed the software while working for the company, and the ERP software could have transformed the company's balance between hardware and software. However, when presented to IBM Germany's senior leadership, the idea was rejected as not being aligned with current or future strategic objectives. Rather than surrender to the whims of senior management, the small group of engineers decided to separate from IBM and pursue the opportunity as an independent startup firm. Ultimately, over the ensuing 46 years, SAP has established market leadership, reaching €26.0 billion in revenue in 2018 (SAP, 2018). Not only did IBM lose the opportunity to establish a stronghold in the ERP market, but the company lost a number of talented engineers and software developers.

By comparison, *radical circles* are activated from the bottom of the organization but institutionalized from the top (the upper right quadrant of *Figure 1*). The radical circle is comprised of employees motivated by their malaise with the firm's current strategic vision. The circle

aims to disrupt the current strategic direction and could be most effective to generate rapid breakthrough changes in the firm's environment.

The transformation at Microsoft to enter the hardware space with the Xbox video game console was driven by a radical circle of four engineers, without any ignition from the top, and well ahead of Microsoft's management recognition of the disruption coming to the firm's competitive environment. However, radical circles eventually rely on institutionalization from the top. Once the radical circle reveals itself, the purpose is not to disrupt and destroy its own organization, but to lead it into a new direction. The radical circle's proposed change to the organization's strategic vision needs resources and support, and therefore, after the pain and suffering of the quest (the process by which the radical circle refines and further sharpens its alternative strategic vision), top management recognition and endorsement to scale up the initiative is critical for the success chances of the new vision. If top management does not recognize the work of the radical circle, the danger is that the radical circle stops its efforts in frustration. Other times, however, the radical circle does not stop its work, but the members of the radical circle leave the organization to continue the circle's initiative as a spinoff.

ILLUSTRATIVE CASE STUDIES

In order to pursue our interest in examining the radical circle phenomenon, we conducted a number of exploratory case studies. Given the inability to identify radical circles before their formation, our retrospective, exploratory study approach may be the most effective means to study the radical circle process. These studies examined the role of radical circles in a variety of settings and firms of varying size. As part of a broader research effort, the research team conducted interviews with radical circle members in each of the three examples, as well as collecting relevant archival data. We crafted case study write-ups for each example and present excerpts from each in this study.

Microsoft Xbox. Four engineers and designers—dismayed by the company's lack of strategic interest in the hardware sector—began to talk together about their concerns about the company's vision. Meeting in secret, the four began discussing potential solutions for the company's absence in the hardware sector (Shani & Verganti, 2016). The four engineers and designers had no previous working relationships with each other, as each was from a different area within Microsoft. This radical circle continued to brainstorm, challenge their ideas and refine their proposed solution without any support or recognition from senior management or any formal, in-house change agents. Ultimately, the radical circle sought support from one senior executive who served as the liaison to Bill Gates, CEO Steve Ballmer, and other top managers. The radical circle's efforts led to the development of the Xbox home video game and entertainment console. The radical circle activated the transformation process within Microsoft without any top management impetus or CEO fiat.

SWM Middle School. SWM Middle School[1] is a public school located in the western United States. Dismayed by the prospects of school closure and recent history of poor student achievement, a small group of parents, teachers, and community members (originally connected through their mutual interest in cycling) began meeting to discuss potential changes to the school. Meeting in secret without support from the principal or school superintendent, the radical circle established norms for its members and ultimately developed a series of proposals aimed at changing the course of the school's fate. Ultimately, the radical circle approached the superintendent and school principal to gain support for their proposed changes. The revised vision included formalizing greater parental involvement and financial support; creating external fundraising efforts to offset shortfalls from governmental funding; and an innovative approach to developing curriculum and in-class experiences. Gaining

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1. *The school's name has been changed to ensure anonymity.*

support from the superintendent and principal, the changes were enacted, resulting in the school avoiding closure and its students performing at levels at or above the best schools in the state. Facing a real threat but an almost unknowable timetable, the radical circle activated the change process that transformed SWM Middle School into the model program that it is today.

Lamborghini Miura. Driven by the desire to surpass Ferrari and other Italian car manufacturers' sports car offerings, a small group of designers and engineers began meeting on off-hours and after work to develop a revolutionary sports car chassis and engine to compete with the market leaders. Led by Chief Designer Gian Paolo Dallara, Assistant Designer Paolo Stanzani, and Engine Developer Giotto Bizzarrini, the radical circle sought to develop and design a sports car despite a corporate focus on continuing development of grand touring ("GT") cars that served as the foundation for the firm's early success. While firm founder and CEO Ferruccio Lamborghini was focused on the survival of his fledgling firm in the face of competitive pressure from Ferrari and Maserati, the small group of in-house designers and engineers activated the transformation process. Given Lamborghini's tenuous status as essentially a start-up in the Italian auto industry at the time, the firm did not allocate resources or managerial attention to sports car designs—preferring to focus on expanding its existing stable of grand touring models. Sensing an opportunity to outpace Ferrari and expand the company's market presence, CEO Lamborghini quickly approved the sports car development project after the radical circle of engineers and designers divulged their design to him (Dallara, 2017). Ultimately, the mid-engine, transverse mounted V-12 powered Miura captivated the auto world in the middle 1960s and remains one of the most desired Italian supercars of all time.

A COMPARATIVE DISCUSSION

As seen above, radical circles can emerge in a variety of industries, organizational forms, and stages of organizational

evolution. Radical circles are often small in size, as their quest requires commitment to the same shared malaise, voluntary resources, and action under the radar. Additionally, they all share a few common features.

First, radical circles are not appointed nor activated by senior management. Unlike the positive deviants at NASA described by Heracleous and colleagues (2019), they come together on a voluntary basis, with a small group of employees sharing a "malaise" towards the existing direction of the firm. Second, unlike the situation at IBM outlined in Hamel's (2000) work, members of the radical circle do not approach top executives early on, for two reasons: (1) by opposing the existing "official" direction of their leadership team, they know that they would be perceived as rebels, and would hardly get support as such; and (2) they initially share only a malaise, but not necessarily a common understanding on how to address the challenge. They most likely bring initial ideas to the newly formed circle, often contrasting to each other, that would collapse if challenged by top executives at this stage. They continue their progress in secret—undergoing the arduous process of questioning, refining and re-examining their ideas for a new vision for the firm. We term this process as the "quest."

The Engine that Refines the Vision: The Quest

The quest serves to transform their initial intuitions into a robust vision. The quest could be considered an intense period of sensebreaking and sensemaking by the members of the radical circle (Altuna, Dell'Era, Landoni, & Verganti, 2017; Pratt, 2000; Weick, 1995). Sensebreaking fuels feelings of dissatisfaction (or "malaise") with the status quo (Pratt, 2000), driving individuals to ask questions such as "Who are we?" and "What are my values and goals?" Questions that are driven by feelings of identity incongruence with the organization (Ashforth, Harrison, & Corley, 2008), most often because of previous personal and unique experiences of the members of the circle.

In order to drive the sensebreaking and sensemaking performed by the radical circle during the quest, the circle develops a tapestry of learning mechanisms (Mitki, Shani, & Greenbaum, 2019). These learning mechanisms enable and encourage organizational learning, and can be characterized across cognitive, structural and procedural dimensions (Shani & Docherty, 2003; 2008). For the radical circle, cognitive learning mechanisms can facilitate articulating knowledge developed within the circle (Zollo & Winter, 2002). Structural learning mechanisms, including communication channels and other infrastructure components (Zollo & Winter, 2002) of the radical circle that could promote the work done during the quest. Finally, procedural learning mechanisms include the institutionalized rules, routines and methods developed by the radical circle that can promote knowledge codification and assessment tools to further the learning of the radical circle during the quest (Zollo & Winter, 2002). Each radical circle could develop its own tapestry of learning mechanisms to facilitate the quest and the ultimate refinement of the newly developed strategic vision.

In the case of the development of the Microsoft Xbox, one of the members of the radical circle had just been hired by the company after a previous stint as a game developer, where he experienced the struggles of programming games on a Windows platform (Ashforth et al., 2008; Pratt, 2000; Weick, 1995).

The radical circle members commit their time and resources voluntarily, develop mock-ups, and slowly and secretly engage other key stakeholders until they feel ready for their approach to top management. In other words, radical circles do not merely come up with ideas, but produce robust visions that have survived the hard, voluntary work, reflections, and mutual clashes within the circle. All in a climate featuring high levels of psychological safety (Edmondson, 1999) that hopefully fuels a culture of nonconformity (Grant, 2016).

Initial Practice of Secrecy-Based Collaboration

There may be significant variation in the level of secrecy and the duration of the quest. The radical circle that drove the change at Microsoft only made themselves visible months after they started, when Bill Gates called for a new project to address the gaming market. It is at that moment that the four renegades emerged from secrecy and unveiled the unorthodox direction they had been working on for months. Their vision was so compelling that Microsoft eventually made the radical circle's unorthodox direction the core of the Xbox development.

On the other end of the secrecy/disclosure spectrum, we examined the development of the Miura sports car at Lamborghini. Similar to the radical circle's work at Microsoft, it was a small group of in-house engineers who activated the transformation process working on their off hours. They wanted to design an aggressive mid-engine, race car inspired sports car, although they knew that Ferruccio Lamborghini, the company's founder, was not a racing fanatic. They started their secret, voluntary quest to begin the design of the vehicle that became the Miura. At the time, the company was essentially a startup, and keeping voluntary work secret was not possible for long. The engineers in the radical circle disclosed their design to Mr. Lamborghini relatively early in the life of the vehicle. Yet, Lamborghini was at that time focused on the survival of his fledgling firm in the face of competitive pressure from Ferrari and Maserati, so he did not provide further support beyond a "just do it." Months later, when the radicals showed him a "naked" prototype of the car (i.e. without the body and styling) Lamborghini fell in love, reframed his vision, and provided the team with the investment and support to move into production. His approval of the design of the category-changing Miura lent critical support to the engineering team working with limited resources to develop a vehicle that could surpass the performance and design features of arch-rival Ferrari.

Table 1. *Diversity of Radical Circles*

	Microsoft Xbox	U.S. Middle School	Lamborghini Miura
Organization Type	• Large public company • Consumer electronics	• Not for profit government entity • Middle school	• Small private company • Automobile manufacturing
Radical Circle Origins	• Small group of company engineers and designers	• Parents, teachers and community members	• Internal team of engineers and designers
Radical Circle Mission	• Develop hardware solutions in a formerly exclusively software-focused firm	• Preserve the school under threat of closure	• Design sports car where primary design directive was to develop grand touring cars
Key Decision Makers/ Gatekeepers	• Bill Gates and entrenched software development infrastructure	• School superintendent and principal	• Ferruccio Lamborghini and automotive media tastemakers
Measures of Success: Innovation	• Competition with established gaming consoles	• School survival and student success	• Surpassing design and performance levels achieved by Ferrari and other sports car manufacturers
Measure of Success: Talent Retention	• Keeping critical software and hardware engineers	• Retaining talented teachers and administrators	• Keeping creative designers and engineers
Key Challenges	• Overcoming history of software development and software market dominance	• Institutional inertia	• Resource constraints and other early stage firm obstacles

Composition of the Radical Circle: The Newness

A third characteristic of radical circle members is that they often have no previous formal working relationships; they share a malaise, which they arrived at individually despite their different roles and personal histories. Once they have come together, the RC members need to develop their own routines and create a "micro-organization" to explore ideas, challenge each other, and make their vision more robust. Our observation is that radical circles form organically. They succeed when they are activated not by top management, but by employees driven by an authentic "malaise" with the firm's current strategic direction. The radical circle succeeds not just by generating ideas, but by producing a deep, robust vision. A radical circle should only approach top management with its new vision once that vision has received significant scrutiny within the radial circle. The members of the radical circle—through the processes of sensebreaking and sensemaking (Pratt, 2000; Weick, 1995)—can not only transform the organization, but redefine each of the radical circle's members' organizational identification.

The radical circle enables motivated individuals to share not only a concern for the organization's goals but exchange meaningful information across a variety of functional areas. Firms need to "enable [the] sharing of specialized knowledge. A firm needs to actively link, leverage, and embed the pockets of individual-based knowledge and expertise, [or] it risks underutilizing it or worse, losing it" (Bartlett & Ghoshal, 2002: 38). A summary of the diversity of the radical circle examples discussed previously is presented in *Table 1*.

The Radical Circle Transformation Process

Given that radical circles triggered organizational transformation in a wide variety of organizations, our studies suggest a possible process-based framework that captures the essence of what we have observed in practice and provide guidance to the OD practitioner. The framework presented in *Figure 2* identifies three main phases of transformation, namely *activating, disclosing*, and *enacting*. The *activating* phase includes the initial formation of the radical circle by organizational radicals, driven by their shared malaise with the firm's current

strategic vision. Once formed, the radical circle develops a variety of norms regarding its composition, its function, and its working rules. These norms help the circle maintain focus as the process progresses—especially during the vision development stage. Vision development is centered on the quest. The sensebreaking and sensemaking occurring during the quest can facilitate the development of a new organizational vision and enhance radical circle members' organizational identification. It would be difficult to imagine the successful enacting of a radical circle without fairly strong feelings of psychological safety by each potential member of the circle.

The solution begins to be revealed in the *disclosing* stage. First, the radical circle seeks to identify and approach an advocate for their new vision from managers and/ or leaders above their level in the organization. The advocate is a critical component for the legitimization of the radical circle work. The second stage of disclosing is the process of gaining leadership support—often directed or orchestrated by the advocate.

Once leadership support is earned, the radical circle-initiated change process reaches the *enacting* stage. As we have seen
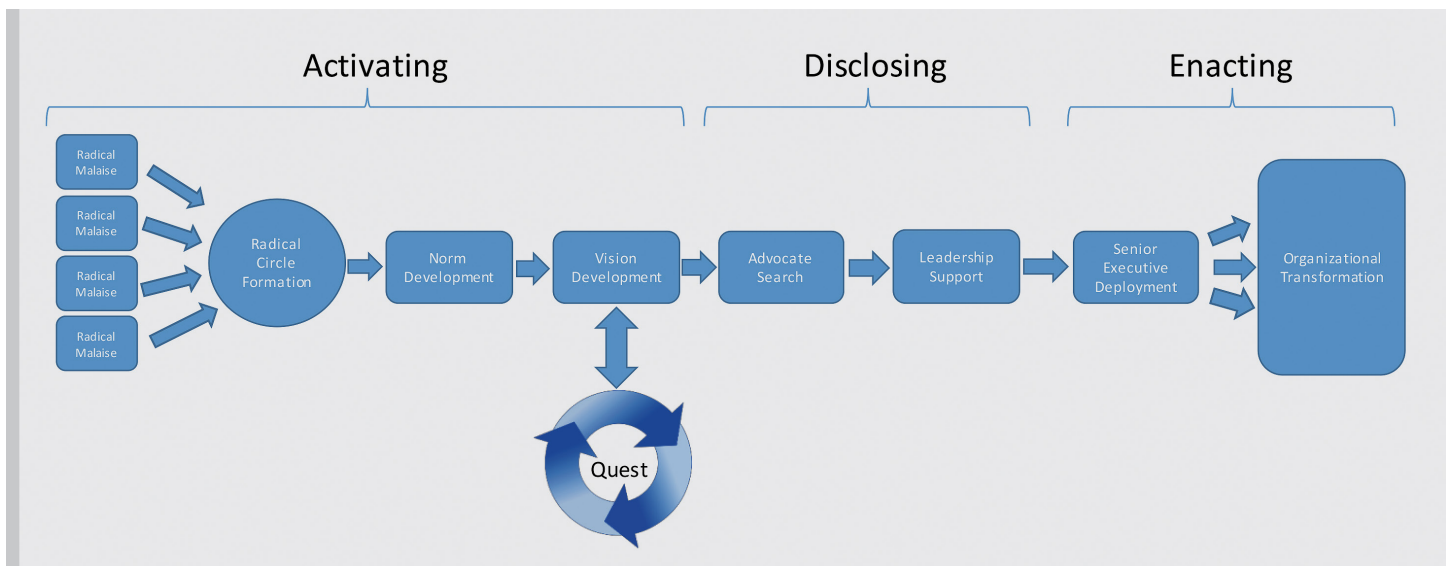
Figure 2. Radical Circle Transformation Process: OD Portal Interface Storyboard

in a variety of radical circles, this is the point where circles often dissolve—as the change process begins to be institutionalized into the broader organization. Senior executives may begin to deploy resources in support of the new strategic vision, as the organization begins to be transformed. While the specific experiences of each radical circle differ, we see the activating, disclosing and enacting process repeating itself each time.

Fostering Radical Circles

One aspect that managers and organization development practitioners can consider when attempting to foster a culture where radical circles can flourish is the creation of a psychologically safe environment (Edmondson, 1999). Creating an environment that enhances employee connection to the organization may hinge on creating a climate for psychological safety (Baer & Frese, 2003; Edmondson, 1999). This climate would provide an environment where employees are safe to speak up without being rejected or punished (Baer & Frese, 2003). Employees operating in a psychologically safe climate may be empowered to pursue organizational changes (Beer, 2020). If employees actively participate in the transformation processes of the firm—especially if they are protagonists in shaping a new direction—they are more prone to continuously find meaning in their evolving organizations (Pasmore, 2015; Reeves et al., 2018). A psychologically safe climate enables divergent thinking,

creativity and risk taking, and motivates employee engagement in exploratory and exploitative behavior (Edmondson & Lei, 2014) and is positively related to successful organizational process innovation and firm performance (Baer & Frese, 2003; Verganti, 2017).

The transformation process model advanced in the paper magnifies that the critical element of the radical circle transformation process is the quest, where radical circle members challenge the ideas originating from the radical circle. The quest is strengthened by the climate of psychological safety (Baer & Frese, 2003), which can facilitate innovation through the freedom to (1) criticize colleagues regardless of level; (2) openly challenge superiors' and others' views; (3) encourage debate with others; and (4) raise counter perspectives without fear of retribution (Pisano, 2019). This "unvarnished candor" generates better solutions than traditional brainstorming or idea generation activities (Pisano, 2019).

Management cannot assign employees to radical circles, nor can they create a radical circle and wait for employees to join—as they might with a company softball team aiming to improve employee morale. Management can create an environment that encourages or frees employees to form radical circles on their own by demonstrating behavior that improves psychological safety. Managers can set the tone through their own behavior—by demonstrating a willingness and ability to constructively critique others' ideas without being abrasive

(Beer, 2020; Pisano, 2019). Additionally, management can demand criticism of their own ideas and proposals (Pisano, 2019). Harvard Business School professor Amy Edmondson discussed the managerial activities at Google that were studied in the company's Project Aristotle that found psychological safety as a very powerful predictor of successful team performance. Edmondson highlighted three managerial behaviors that were critical to Google's success, namely, setting the stage, inviting engagement, and responding productively (Nickisch & Edmondson, 2019).

A significant component of the psychologically safe environment is one in which leaders are willing to engage and listen to their employees—setting the stage and inviting engagement in Google's Project Aristotle terminology (Nickisch & Edmondson, 2019). Leaders need to be best prepared to listen to the radical ideas originating from their employees, rather than trying to create radicals from among their employees. Listening carefully to the unorthodox ideas can enable a more productive exchange with the radical circle. The best way to recognize the promise of radical circles is to test the robustness of their vision. Top executives and their management teams should challenge the radical circle—to check if the circle has indeed struggled through its quest to develop and refine its new vision—but be oriented towards openness to hear and understand the proposed new vision that has emerged from the radical circle.

CONCLUSION

Organizational transformation is an ongoing organizational challenge. We have highlighted the emerging phenomenon of radical circles as an engine that can aid organizational transformation. A few of the variations of radical circles have been explored in our illustrative cases and the insights in this study. The merit and complexity of the phenomenon suggest opportunities for continuous learning and experimentation. Following the research findings and advocacy of radical circles as presented in this article, the question that requires attention among OD scholar-practitioners is "Can organization development be instrumental in supporting a learning culture that will nurture radical circles"? This study helps appreciate the complexity and difficulties of facilitating collaborative studies of emerging 'secretive' practices and recognize that while complex, there is an opportunity for the OD practitioner to explore a different avenue to facilitate learning culture that appreciated emerging initiatives and transformation. Yet, the potential payoffs from being actively engaged in the continuous effort to facilitate organization transformation are invaluable.

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"... by integrating pulse and census approaches holistically, and leveraging the pulse model to create a more diagnostic framework, the tool can provide critically important information to advise a larger organizational change agenda."

Using a Pulse Survey Approach to Drive Organizational Change

By Julian B. Allen, Sachin Jain, and Allan H. Church

Over the past several decades, organizational surveys have shifted from being a novel intervention for gathering employee feedback (Nadler, 1977) to a critical and standard methodology for generating strategic insights, tracking culture change, and driving both large-scale and local action planning down to the managerial level (Burke, Coruzzi, & Church, 1996; Church, Margiloff, & Coruzzi, 1995; Church & Oliver, 2006; Church & Waclawski 2001; 2020; Kraut, 2006; Wiley, 2010). Surveys have proven themselves as a cornerstone in the Organizational Development (OD) toolbox to gather employee insight and inform change.

Consistent with this point is the continued rise and frequent use of pulse surveys (Colihan & Waclawski, 2006; Jolton & Klein, 2020), intended as short and timely indicators to understand if interventions or action plans are on track. The brief and targeted nature of these surveys provides increased flexibility and the opportunity to generate insights at the strategic level (pulse surveys are not typically suitable for local action planning given their design). Yet, as some have argued (Church & Waclawski, 2020), pulse surveys in their current implementation present serious limitations. While data from pulse surveys may be highly engaging to senior leadership, results are unlikely to drive change from an OD perspective given their typical incomplete integration with the broader organizational system and content. For this reason, practitioners often require follow-up focus groups or interviews to support the interpretation of results.

Given these challenges, one might argue that pulse surveys should be abandoned in favor of a return to large-scale census driven change survey programs. While more comprehensive (and census-based) surveys do play a critical role in setting a baseline for organizational change, we argue that it is possible to apply pulse survey methodology to organizational change initiatives if practitioners are prepared to take an agile mindset to their survey programs. Specifically, by integrating pulse and census approaches holistically, and leveraging the pulse model to create a more diagnostic framework, the tool can provide critically important information to advise a larger organizational change agenda. If done well, pulse surveys can communicate or inform the need for change and allow OD practitioners the ability to flex the content quickly into a more in-depth data collection tool.

To illustrate best practices and learnings from our own experience at PepsiCo, a global consumer products organization with $67 billion in revenue, the purpose of the current paper is twofold. First, we will demonstrate how to implement a pulse survey in an agile manner as an OD intervention. The paper focuses on how a short and targeted survey can be leveraged to set strategic direction and inform organizational change. Second, to solidify our arguments, we leverage a recent COVID-19 pulse survey (called the "Take Care Pulse Survey" conducted at PepsiCo in April of 2020) as a case example. We will share how the survey was developed, key results identified and the impact those had on the

organization's flexible ways of working strategy, and learnings from the process. It is our intention that other OD practitioners may learn from this case example to enhance their own approach to using pulse surveys to support large-scale change in an agile manner.

Organizational Surveys Traditions and Standards

The organizational survey started as a baseline measurement of employee attitudes and behaviors. The main purpose of surveying was to measure and track opinions over time and action-plan. However, as surveying became common practice, their purpose was elevated from measuring and tracking to promoting large-scale organizational change. With the consistent adoption by OD practitioners, the survey itself became a vehicle to drive key messages and interventions (Church & Waclawski, 2001; 2020). Simply stated, surveys drive change via classic Lewinian OD theory (Lewin, 1958) by presenting data that creates dissatisfaction with the current state, which in turn creates a felt need for change (Burke, et al., 1996; Church & Waclawski, 2020; Nadler, 1977).

At PepsiCo, over the past 20 years, a similar approach has been followed. Surveying is standard practice at the global level, with an annual survey designed to create a desire for change and diagnostic pulse checks throughout the year. Further, at the local level, there are frequent focus groups, surveys, and interviews that center on targeted employee concerns. Taken together, these initiatives are based on a single model of employee engagement and commitment to ensure a unified understanding and reduce ambiguity when designing and analyzing results. Research at PepsiCo over the years (Church & Oliver, 2006; Church et al., 2012) has shown conclusively that taking action from the survey process leads to change over-time, while just sharing results from a survey has no impact (or even negative impact) on employee engagement. However, more recently, this standard process and approach, despite its integrated nature, was still not fulfilling the organizational

need. As the external need for change of the COVID-19 pandemic emerged, new types of insights and of a highly timely nature required us to reevaluate our program. Simply put, we could not wait for the core cycle to meet our needs nor was the content uniquely targeted to the challenges ahead. We found ourselves operating on accelerated timelines, with senior leaders needing (1) immediate diagnostic insights regarding how employees were responding to the crisis, (2) an understanding of whether our communications and tools were best supporting our employees, and (3) recommendations for shifting the culture going forward to enable greater flexibility in how we work.

Purpose and Process of the COVID-19 Survey Initiative

Organizations worldwide have been confronting the realities of a new normal with the COVID-19 pandemic (Church & Ezama, 2020; Connley, Hess & Liu, 2020; McKinsey & Company, 2020). From a talent perspective, challenges in this context range from choosing how best to redeploy or build new capabilities in talent to the decision to retain or furlough employees. For PepsiCo, at least toward the start of the pandemic, a key question surrounded the engagement and needs of employees while working remotely. Although industry has been shifting to remote or more flexible ways of working, a fully remote infrastructure was never foreseen at PepsiCo prior to the COVID-19 crisis. The rapid and unexpected shift to remote work for over 30,000 professional employees who previously had worked out of offices around the world resulted in multiple questions:

» Are employees able to adapt to their new work arrangements?
» Are employees able to cope with their family or personal demands and work demands simultaneously?
» Are employees aware of the programs and solutions being offered to them by the organization?
» And how do employees feel overall about the company during this time of crisis?

As corporate owners of the internal organizational survey agenda, the PepsiCo Center of Expertise (COE) for Global Talent Management, we were asked to answer these questions and more at a critically short moment in time. More specifically, during the COVID-19 pandemic, to support evidence-based decision making we were tasked with understanding and determining employee sentiment and needs. As our senior leadership team prepared to launch communications, push capability training out to the field, and change policy to support employees, they required an understanding of how best to care for employees and the organization.

However, unique to this scenario, there was a desire for quick evidence as the crisis was new, uncertain, and rapidly driving change. This was a great example of the external environmental pressures outlined in the Burke-Litwin model (Burke & Litwin, 1992) for organizational performance and change in action. This focus on speed shortened our window for design, alignment, and execution of a new survey agenda. Further, with the crisis impacting all employees, there was an overarching fear of straining employees by overcommunicating and surveying. Based on these questions and the legitimate constraints (i.e., speed and brevity), our team of internal OD practitioners and I-O psychologists developed and executed a new form of pulse survey specifically designed to both inform PepsiCo's response and engage employees in the process.

The initial decision to conduct a pulse survey was based on its clear benefits for tracking change but in particular because of its ability to be implemented quickly (Colihan & Waclawski, 2006). However, being aware of the limitations of pulse surveys—oversimplifying larger organizational concerns, not representing the entire organization (given a frequent sampling approach), and limited ownership for change or results (Church & Waclawski, 2020)—there were a few key design changes we implemented to shift the focus of the approach from a simple "pulse check" to a more diagnostic deep dive survey model for driving change. In building and implementing the pulse

survey to determine employee needs there were a few survey standards or conventions that were upheld, a few that were stretched to ensure speed, and a few trial-and-error components (in the spirit of an agile mindset) that supported our efforts. Each of these are detailed below.

Standards followed. While developing the content and approach for the pulse survey there were various key standards to ensure results supported and informed organizational initiatives in response to the rapid shift to remote work. These should be

and engagement framework used in our core global Organizational Health survey program. This framework centers on the key drivers of employee engagement and commitment by focusing on employee perceptions regarding their career, team, work, and company as major categories. By starting with the existing framework, our goal was to ensure the survey content would be actionable and consistent with previous standards and the larger survey and change agenda. Based on this review, the item "I feel energized by my work," included in our annual engagement survey and quar-

about employee attitudes above and beyond the company as a whole. We believed by including sentiment we would be better positioned to answer the question from senior leaders about how much internal attitudes were being driven by external concerns in the world relative to actual internal practices by the management team and the organization.

Having defined the two main outcomes, we began to identify the areas that employees required organizational support based on the shift to remote work. Three main categories of employee needs were identified:

» ***Information needs***, focusing on employees having an outlet to communicate and ask questions;
» ***Resource needs***, to understand if employees and teams have the desired tools and are adapting appropriately;
» ***Social needs***, to understand work-life balance concerns and the shift away from face-to-face interactions.

> Reflecting on the decision to take a storytelling approach, rather than a more traditional local action-planning framework, we believe it provided clarity in a time of uncertainty. A single-story contextualized around PepsiCo's major groupings (e.g., sectors, primary countries) and key demographics (e.g., gender, functions, age cohorts, level groups) simplified the move from receiving the data to initiating change. More specifically, with these groupings and demographics we were able to highlight areas requiring additional support, needing increased social connection with their team and leadership, improved capability training on remote technology, and attention toward work-life balance given the merging of work and home.

familiar to most OD practitioners but are worth mentioning as they helped with the success of the survey. To start, our team focused on integrating the pulse survey with the larger organizational social system (Katz & Kahn, 1978). Although pulse surveys are frequently viewed as one-off diagnostic surveys, it is beneficial to integrate them into a larger change management agenda and with the right level of depth to ensure accountability of the results. With the "Take Care Pulse Survey" specifically, we wanted to ensure results were captured appropriately and not forgotten. To this end, following recommendations by Church and Waclawski (2020), we took a social system perspective in developing and communicating the pulse survey.

In developing the survey content and items, we started by revisiting our standard and well-socialized employee commitment

terly pulse check surveys, was added as a primary outcome measure. With this item, we were able to track changes over time and reinforce the importance of the current pulse survey.

From there, considering the unique circumstances, we also consulted the broader literature on remote and virtual work (e.g., Gajendran & Harrison, 2007; Golden, Veiga, & Simsek, 2006) and benchmarked with other organizations to ensure we were tapping all employee needs appropriately. Based on this review we added a secondary outcome of overall "employee sentiment." This represented a unique approach for our organization and one that we have rarely seen used in other internal survey programs as well. As survey outcomes are typically work-specific, this was a new construct for the organization and was intended to provide information

Moving forward, from a communication standpoint, every survey needs to have clarity of purpose. Without purpose, a survey can produce ambiguity and uncertainty impacting response rates, direction in the analysis of results, and actionability of insights (Church & Waclawski, 2001; 2020). From a systems perspective, the purpose and any communications surrounding the survey should be integrated with company values and objectives. This way OD tools can increase their value and impact for senior leadership and employees. For the current case, the purpose was clear—to identify employee needs to drive energy and sentiment during the rapid shift to virtual work. Based on this purpose, the communication campaign and survey were titled "Take Care." With a clear agenda, the following steps were taken to ensure this purpose was aligned and communicated appropriately.

Given the need for speed in executing the survey, our team moved quickly to present an integrated timeline between the current pulse survey and other survey efforts. The integrated timeline demonstrated that the current pulse would provide an understanding of needs, while the

regularly scheduled leadership pulse (in May) would serve as a follow-up. By using this approach, the current pulse was not viewed as a one-off initiative but part of a larger survey and change agenda making it more impactful to senior leaders. This timeline and purpose were then aligned with our sector Chief Human Resource Officers (CHROs). Ideally, we would have taken steps to align talent management and OD teams at lower levels as well, but in the interest of time, we aligned the top to ensure others would fall in place. Further, in communicating the survey to those invited to participate, a corporate communication was shared from PepsiCo's global CHRO stating the purpose of the survey and diligently connecting the survey to PepsiCo's core values as outlined in The PepsiCo Way, an aspirational framework that describes the behaviors that shape our shared culture. Key across these efforts was the transparency of communication in the purpose of the survey and integration with the larger social system (i.e., PepsiCo values, and the employee engagement & commitment framework).

Standards "stretched" (broken). Until now, most of the process described should be familiar or evident to practitioners who engage in survey work. However, with the current pulse survey, there were a few key areas where we applied an agile mindset and stretched our typical approach, and with hindsight, these decisions supported the success of the project. The two main changes, described below, were a focus on developing a unified and integrated story with the results (Church & Waclawski, 2020), and the inclusion of both work and non-work specific outcomes of interest.

Taking a storytelling approach, results for the pulse survey were reported at a global level with minimal slicing of the data by company demographics. Applying an understanding of PepsiCo's past and taking into account the larger COVID-19 context (i.e., number of positive cases and lockdown stage by country), results were reported in a more deliberate narrative manner for senior leadership rather than a bottom-up approach allowing local teams to shape the interpretation (which

is atypical for us given our local action-planning survey framework). The goal was to provide a unified story and reinforce the value of the data to initiate and inform PepsiCo's response to the rapid shift to remote work. Reflecting on the decision to take a storytelling approach, rather than a more traditional local action-planning framework, we believe it provided clarity in a time of uncertainty. A single-story contextualized around PepsiCo's major groupings (e.g., sectors, primary countries) and key demographics (e.g., gender, functions, age cohorts, level groups) simplified the move from receiving the data to initiating change. More specifically, with these groupings and demographics we were able to highlight areas requiring additional support, needing increased social connection with their team and leadership, improved capability training on remote technology, and attention toward work-life balance given the merging of work and home.

Table 1 provides an overview of the key findings from the survey itself.

The second major shift in the design of the survey was the inclusion of both a work and a non-work specific outcome. As previously mentioned, the two outcome items included in the pulse were energy at work and overall employee sentiment. The energy item, as it is part of our larger engagement scale, was included to enable us to track scores over time but more importantly calibrate the current attitudinal state of our employees with prior results. By asking this question (though not actionable by itself) we were able to determine whether employees were more or less motivationally impacted by the current COVID-19 dynamic.

The sentiment item, on the other hand, was added as a result of our literature review and conversations with local OD teams. Admittedly, we were hesitant in adding a general sentiment item as it was

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Table 1. *PepsiCo Take Care Pulse Survey Key Findings*

- Across the organization results demonstrated that employees needed increased social connection with their team and leadership, improved capability training on remote technology (e.g., Microsoft Teams, Zoom, Skype, etc.), and attention toward work-life balance given the merging work and home.

- By continents or major business regions, those entering the COVID-19 pandemic (e.g., the preparation & prevention stages) reported higher levels of sentiment and energy compared to those that were already in confinement and with restrictions.

- Over time, based on a matched sample (n = 10,260), there was an overall drop in employee energy of 3% from September 2019 to April 2020. However, results differed by country, suggesting varying levels of resilience or tolerance based on a combination of socioeconomic status, government response, and COVID-19 stage. Countries such as China, India, Saudi Arabia, Mexico, and Brazil showed increasing or stable energy over time, while Australia, USA, Canada, and South Africa experienced a decrease over time.

- Groups adjusting to remote work or with increased demands, as a result of the pandemic, reported lower work-life balance, and overall energy and sentiment leading to potential concern for burnout.

- Employees that were already working remotely before the pandemic were more favorable. North America employees working from home prior to COVID-19 reported higher levels of energy, work-life balance, and social connection compared to North America employees newly working from home. Findings suggested that with time employees can adapt and that we need to learn from these employees.

  NOTE: Results are based on 13,658 PepsiCo employee responses globally.

outside the realm of work and even less actionable than the energy item. However, measuring sentiment proved immensely valuable to our senior leaders in contrast to energy, ensuring the data was both insightful and accepted as reflecting reality. Specifically, we found that while energy was consistently high across almost all cohorts, business units or functions examined, sentiment was considerably lower and varied by the stage of COVID-19 across different countries in our global organization. *Figure 1* provides an example of how we were able to compare the two outcomes for our senior leaders.

In short, overall employee attitudes about the world differed much more significantly by the state of their external environment (safety), while their work-related attitudes were impacted more by actions taken by the organization. Often in survey programs, senior leaders can question the perceived validity (in the colloquial not empirical use of the term) of survey data. By using both outcomes we were able to show that they were in fact measuring very different attitudes.

Coincidences achieved (aka Trial and Error). Lastly, unbeknownst to us there were a few design decisions that worked in favor of the survey and results. While determining the population for the survey, for example, there was an internal debate whether to use a sampling approach or a census approach. This is a common survey methodology question and particularly relevant to pulse surveys as many would argue that a sampling approach is preferred (Colihan & Waclawski, 2006; Jolton & Klein, 2020). Although there was a concern of burdening employees and not providing enough time to respond to the survey (two weeks rather than our typical approach of one month), a more inclusive census approach was favored. This approach was chosen specifically because the survey was meant not only to measure but to *communicate to all employees* impacted by the COVID-19 pandemic that the organization was interested in following-up with them. Although a sample would have been easier and produced arguable equally valuable
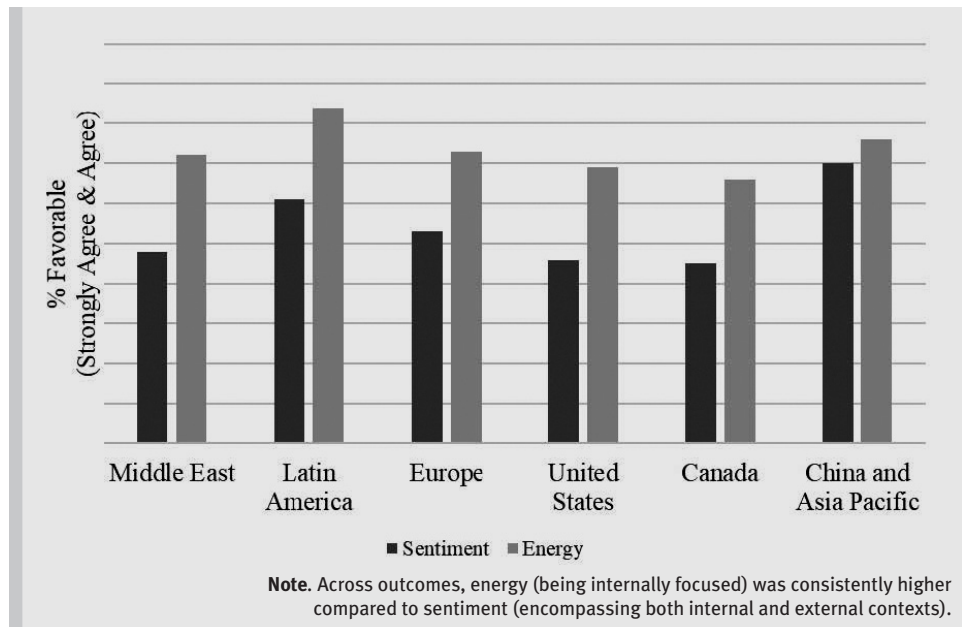

Note. Across outcomes, energy (being internally focused) was consistently higher compared to sentiment (encompassing both internal and external contexts).

Figure 1. Employee Sentiment and Energy across PepsiCo Sectors

results, the census pulse design reflects our OD mindset in driving key communications (leadership concern for employees) and active engagement (all employees impacted asked for their input).

Interestingly enough, even without the usual fanfare and follow up of our standard surveys, we received a comparable rate of 45% in just 2 weeks and the vast majority of those came in during the first few days of administration. Reflecting on the process, despite the shorter administration window, the decision to take a census approach was beneficial. Employees wanted to voice their opinion on this particular topic and appreciated being asked. In fact, based on an open-response question included at the end of the survey ("Tell us a positive story or contribution you have recently experienced at PepsiCo to best manage the current situation"), employees shared a strong positive narrative of leading the way and helping each other adapt to remote work. The survey sent a clear message of inclusion, and with more employees participating results were readily accepted by senior stakeholders (pulse surveys based on samples often get criticized for not being accurate even if they are based on representative samples). *Table 2* (next page) provides sample feedback from employees about the survey itself and their appreciation for the timeliness and content.

In the end, after only a two-week administration window, results based on

13,658 employee responses were delivered to senior leaders within two days of the survey closing. The results of the survey were communicated almost immediately in multiple forums and outlets including presentation and discussion with the senior executive team, review with the top 200 executives, action planning with the top 60 HR executives, discussion at the Board of Directors level, and a report out to the broader employee base during a global Town Hall hosted by the CEO.

In addition, results were shared and used by local business leaders and functional SVPs to engage their employees and align to the common set of messages and findings. Finally, the results also helped shape the organization's new (and significant cultural departure) approach to flexible working, as well as inform the shifting Diversity & Engagement strategy in support of a new leader in that space. In fact, the impact of the survey was so positive that within 2 weeks the Business CEOs asked to expand the same survey design to their frontline supervisors.

Key Learnings

Large-scale employee surveys are one of the most impactful methods for creating a need for or supporting change and generating key insights and actions to improve the workplace (Church & Waclawski, 2020). However, based on our experience with

Conclusion

While many professionals throughout the world are continuing to adjust to working remotely, the new normal of not being in the office, extensive virtual meetings, and merging of personal and work life has many leaders, managers, and employees questioning how others are feeling and adjusting. Given this curiosity, there is an abundance of anecdotes and quick-fix solutions readily available. The role of the OD professional, however, in part, is to help support the needs of both employees (managers) and senior leadership through evidence-based approaches to data-driven change. Taking a short and targeted survey approach, we encourage OD practitioners (both internal and external) going forward to seriously consider item design, survey purpose, and reporting of results when conducting their survey programs. Pulse surveys provide the needed flexibility in a larger survey agenda or in times of crisis but require care to ensure their success to set strategic direction and inform organizational change.

the Take Care Pulse Survey at PepsiCo, we have seen the potential impact that a seemingly simple, yet strategic and agile pulse survey approach can have on senior leadership and the organization. While we certainly endorse an annual large-scale census driven survey program for deep diagnostics and local action planning, we now also have an excellent example of another more agile form of pulse surveys for change. Listed below are a few key implications for OD practitioners to consider for increasing the strategic value of their (or their clients') survey initiatives and interventions during both the current crisis and for future implementations as well:

» Pulse surveys can communicate what matters to the organization. Although many practitioners consider pulse surveys to be simplistic tools they can be used to signal and communicate change just as well as larger surveys if executed in the appropriate timing and with the right communications support.

» Pulse surveys can be highly inclusive and engaging. Apart from their ability to track trends, when extended to all employees they also send key messages about inclusion and engagement.

» Pulse surveys can drive organizational change through storytelling. Collecting survey feedback is always the easy part. The real challenge, in effectively leveraging survey data for change, is the ability to tell a meaningful story to create action (Church & Waclawski, 2001; 2020). Connecting results to the organization and larger context, to create a simple and compelling narrative, can help guide the conversation toward key insights rather than enabling "analysis paralysis" that can occur. This helps ensure ownership and accountability over the results.

» During a crisis, timing and content are equally critical. We recommend taking an agile mindset to both when surveys are launched (and how) as well as what is measured (e.g., bespoke items vs. standard tools from large benchmarking firms who do survey work but offer little flexibility). Balancing speed with alignment is the key challenge which is where having expertise in survey design can help move a process quickly.

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"The desire for newness is usually an escape from going deeper and increasing our commitment to what we are now engaged in. 'Been there done that' is not a report on what occurred, it is an expression of pure cynicism. For most of the attempts at innovations in organizations, we have not really been there and didn't do it."

Nothing is Next

By Peter Block

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The discussion of trends always makes me a little uneasy. To the extent it is designed to predict the future, it borders on the occult, with the idea that if I can predict the future, I can control it. When the future is subject to our control, then it is no longer the future; it is the past carried forward.

It is a fair question, however, to seek trends that are occurring in a field in the present. It is a way of focusing our attention in hopes of creating a more powerful, though unknowable, future. Even this, though this needs to be distinguished from asking what is new in the field.

The desire for newness is usually an escape from going deeper and increasing our commitment to what we are now engaged in. "Been there done that" is not a report on what occurred, it is an expression of pure cynicism. For most of the attempts at innovations in organizations, we have not really been there and didn't do it. So when we ask, "What is new?" it is a faux curiosity.

Back to my assignment, to discuss trends in OD. I prefer to begin with trends in the world rather than in the work, since our work needs to be a response to the world, not just an interest in our own technology. Here are some big trends that have been in play for a while, but still important:

External Trend #1: Globalization. Underneath the obvious desire for new markets, globalization is coded speaking for exporting culture and justifying standardization; both at the cost of local culture and capacity. Too reminiscent of the colonial era. While the globalization conversation begins with the expansion of markets and low cost supply, it is much more.

To expand markets for our comparative advantage, the US does a hard sell for American lifestyle that is basically consumerism. We sell this hard to Asia, India and other high population regions. The effect is to homogenize cultures and install materialism. Granted, we are selling to a willing and eager portion of the receiving population, but we bear the brunt of the responsibility.

To be global also leads to the desire for companies to bring global consistency to their internal management practices. This has the effect of discounting local wisdom and knowing. It is the modern equivalent of "taming" the west. It is justified by our capital investment, propelled by forward moving consulting firms, and implemented by training programs which explain the new financial, IT, supply chain, manufacturing and human resource management systems.

External Trend #2: Fearful Employees. In a world of increasing consolidation and lessened customer choice, employees have been commoditized. Workers are treated as costs, not assets. The faster we can automate processes, outsource functions and send questions to a website, the happier we are. It is cost effective, but has created widespread insecurity so that people are as afraid of their bosses now as they were forty years ago when I began this work.

I had thought that when team building, larger group methods, decades of employee involvement and the results

gained by the quality movement had become mainstream and part of the common knowledge, we would care more for our employees. I would have expected we might have reduced the social distance between levels. We would act as partners in our relationship with the boss. We would feel the place we work is where we belong. I don't see it, maybe I am missing it, but the alienation and caution people feel about their workplace seems too painfully common.

External Trend #3: Technological Addiction and Long Distance Relationships. In the name of speed and cost, the senses of sight, smell, touch and hearing are becoming obsolete. They are the casualty of email, teleconferencing and the rest. This makes our way of relating senseless. Who knows what affect this will have on our capacity to care, to commit, to act as owners, to choose accountability. We can now send Avatars, fictional creatures of our imagination, to meetings for us. How great is that? Perhaps we will soon be designing training programs for Avatars.

The point is that while technology offers efficient and quick exchange of information, it carries a cost of intimacy and personal connection. Plus this has nothing to do with different generations. The teenagers in my home are as eager and desirous for close, in the same room, relationships as the grown-ups.

Trends In OD Called Forth by these Forces

Organization Development has always been as much a set of values as it is a methodology. It has something to do with the centrality of being human and the way for organizations to affirm this. It seeks work processes that place choice close to the core worker. We value personal freedom over supervisory or centralized control. OD began with an affection for better teamwork, a preference for cooperation between groups.

In our weaker and more honest moments we have called for spirit at work, joy at work, democracy at work, more

vision and of course, the transformation thing.

To sustain these interests in the face of a world which votes fundamentalism, rewards efficiency above all else, and glorifies the celebrity of very rich CEO's is not easy. If we want to stand in support of local culture, local choice, and the sacred element of personal relatedness, here are some trends we choose to reinforce:

> Organization Development has always been as much a set of values as it is a methodology. It has something to do with the centrality of being human and the way for organizations to affirm this. It seeks work processes that place choice close to the core worker. We value personal freedom over supervisory or centralized control. OD began with an affection for better teamwork, a preference for cooperation between groups.

OD Trend #1:
Small Groups are the Unit of Real Change.
The small group movement becomes essential. Small groups, especially in the presence of many more small groups meeting at the same time, are the place where intimacy, our voice and the uniqueness of the human being is valued. This is where fear falls away, in our relatedness with peers. Call it large group methods, book clubs, community conversations, the art of hosting, world café, or circles with a variety of adjectives; small groups are at the center of how the world changes.

Margaret Meade knew this; Castro said that all he needed for his revolution was nine committed people, Saturn built autos

that are lighter and cheaper based on this concept.

The small group recreates traditional cultures and symbolizes the equality of each member. It is the configuration of a democratic gathering; it reduces the dominance of those who wish to dominate. The world calls for scale and consistency, what makes a difference is the small group.

OD Trend #2:
Leader as Convener
Rather than Role Model
The era of romanticizing leadership is nearing an end. Leader as a collection of personal qualities, style setter, visionary, cause of all that occurs beneath is a tired concept. Only retired CEO's hold onto this version of their success.

What was reserved for facilitators is now the province of leaders. Great leaders have the capacity to create a future distinct from the past and they create this by the way they engage employees and citizens in the creation of this future. They pay careful attention to the structure of how we gather. They pay less attention to the PowerPoints and getting the message just right, they know how to convene people.

This shifts our leadership training from standardized models and focuses on how to bring groups together. We teach the methods of small groups and powerful questions and call this great leadership. This allows for leaders to not have answers, which is the case most of the time, and invites leaders to join the small groups as a powerful member.

OD Trend #3: Change the Conversation, Change the Culture.
If all transformation is linguistic, then we create a new future by having new conversations. All change begins with a new listening and speaking, so this is the antidote to standardization and gives a clue how to make even long distance conversation more intimate and personal.

We choose to keep learning more about the power of conversation, here is what we know now. We know that new conversations are triggered by powerful questions. We see that answers keep

We cannot stop globalization, but we can stop colluding with it and act to hold it off as a way to internally manage our business. Organization Development is a voice for local control and the preservation of local culture. Our task is to organize groups at each level and within each unit to create their own way of working and producing. Call this community organizing.

us stuck. The best questions are ones that carry within them the experience of being accountable for what occurs in the world. These questions occur best in small groups where people are admonished not to give advice to each other. Let us be curious about each other and stop being helpful.

OD Trend #4 is a Counter Trend: Be an Advocate for Local Control.
We cannot stop globalization, but we can stop colluding with it and act to hold it off as a way to internally manage our business. Organization Development is a voice for local control and the preservation of local culture. Our task is to organize groups at each level and within each unit to create their own way of working and producing. Call this community organizing.

This means our primary client is in the middle, upper middle of the system. This has always been where change has been initiated. We need to be weaned from our attentiveness to top management. Not to ignore them, but to keep them in perspective.

High performance and a habitable organization comes from local groups defining their own path, even though it may be risky. If the local group is successful, this is what buys an exception from the desire of the center to mold the distance provinces in their own image.

What is on our side is that the standardization of worldwide functions and people management does not work. It is well funded and generates big programs but inevitably fails or loses steam. Unfortunately the best people leave before the steam is gone, but this is the way it works.

Given the global talk and effort, the counter trend of building strong and unique local units really only requires patience. Sooner rather than later, we will find openings to work to sustain diverse cultures, value many ways of operating, live well without having to get on board, and be a part of systems that are productive, even though they may not be popular.

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Peter is the author of several other best-selling books about ways to create workplaces and communities that work for all. They offer an alternative to the patriarchal beliefs that dominate our culture. His work is to bring change into the world through consent and connectedness, rather than through mandate and force.

With other volunteers, Peter began A Small Group, a network of citizens engaged in the restoration of their community through the powerful tools of civic engagement. You can visit this website at www.asmallgroup.net. Peter welcomes being contacted at *pbi@att.net*.

"Organizational change, especially this degree of change, is difficult. The old culture and ways of working trump the new; the policies and practices people are used to take precedence over those to which they aspire. The new gets little traction. It is walled in. It takes more than intent to change how the organization operates."

A Need to Connect

The Role of OD in Bringing Down the Barriers to Connection

By Frederick A. Miller

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In describing the impact of change in organizations, theorists from Kurt Lewin and Dick Beckhard to Mary O'Hara-Devereaux and Ervin Laszlo have employed terminology and models reminiscent of the science of seismology. From Lewin's three-step process of unfreeze-transition-freeze to more recent theories and conjectures, the described effects of change sound strikingly similar to the impact of an earthquake.

Forty years ago, when the practice of OD was in its infancy, practitioners set out to help organizations cope with transitions made necessary by sudden earth-shaking upheavals: the massive growth spurred by the post-war population boom; the GI bill-sponsored knowledge boom; the outcry for democratic practices in the workplace; the response to the Civil Rights Movement; and the growth and spread of new technologies.

Today, the onslaught of change has become even more rapid, relentless, and seismic in scale. Organizations are at greater risk than ever before. As we move farther into this era of seismic change, a major difficulty for organizations—and OD practitioners—will be in understanding what organizational capabilities and individual competencies are required for organizations to survive and thrive. A key capability that has been identified by many practitioners and theorists is for organizations to be more of a flow than a hierarchy; more across and out than just up and down.

Considering the growing need for cross-disciplinary collaborative, knowledge-transferring, and ever-shifting high performing *ad hoc* task-teams, the advantages of the fluid-network organization over the rigid-hierarchy organization are clear. What has not been clear is the *how* of making that a reality; many organizations have tried and failed, and are still trying to find the answer.

Organizational change, especially this degree of change, is difficult. The old culture and ways of working trump the new; the policies and practices people are used to take precedence over those to which they aspire. The new gets little traction. It is walled in. It takes more than intent to change how the organization operates.

Connection is key

Connection between people, departments, divisions, and organizations is the key to survival and success in this era of knowledge-driven seismic change. I believe the Connected Organization is the organization of the future. Not just in the use of technology, but in how the work of the organization gets done—the way humans need to interact to maximize our capabilities.

In a connected organization, people are enabled and inspired to do their best work because they are included; have a sense of belonging; and can obtain the knowledge they need to perform and add value. Each person is enabled to contribute to problem solving, decision making and invention.

To create a connected organization, it will be necessary to remove impediments to speed of knowledge transfer and knowledge application. These are the real barriers to higher and higher operational performance. But they are stubborn barriers, and they put the future in doubt for many of today's organizations.

Walls give us structure, differentiation, and protection. But walls also inhibit us. They cut off our creativity, participation, access, networking, knowledge transferring, and flow. The role of the OD practitioner will be to assist organizations as they bring these walls down to unleash the energy, flow, and connections of the people of the organization. It will take all the knowledge, skill, and experience of the OD profession to help redefine, restructure, and reinvent organizations. OD practitioners will have to be comfortable in this environment of constant change, shifting organizational configurations, and walls tumbling down—comfortable enough to provide comfort to leaders.

Networking technologies are making it possible for people to work together in many different configurations, within and across organizations. As OD practitioners, we must constantly enhance our understanding of these technologies to participate in collaborative enterprises and communicate with our clients and colleagues. But we, and many people within organizations, are being hampered by walls that make it difficult and often impossible to connect, to do our best work, to bring innovation, to collaborate and to create partnerships within the organization.

The four walls that must fall

Four monumental walls are hampering connections in organizations, and these walls must come down to enable people to connect. These four walls will have to fall before connecting can firmly take root in most organizations.

Bringing down these walls will change in major ways how organizations operate. Whether people in the organization see the change as trouble or opportunity depends in large part on how well-prepared they are. This is an opportunity and a responsibility

for OD practitioners, because these walls ARE going to fall. In some places, they are already falling, and they will require new mindsets and skill sets for clients and practitioners.

1. The wall of hierarchy and tenure

Many organizations still have remnants of the old military model in their ways of operating, with individuals offering deference and transferring knowledge to certain people because of their roles, titles and need to know. In the past, this approach might have made sense, but today it must be replaced with a model that values knowledge and ability, and one that uses those qualities as the reason to connect.

Hierarchy and rank block innovation, creativity, contribution, and connection. If only a select few are allowed to contribute, only a few will contribute. If only a few are rewarded for their contributions, only a few will do what is necessary to receive those rewards. If the value of contribution must be passed through layers of hierarchy to be recognized, it will likely create friction and resistance with every layer.

The fall of this wall will change leadership. It will no longer be the right or responsibility of only one person or a select group. With expertise diffused throughout organizations, leadership must be in the hands and hearts of those best equipped to exercise it. Peer-to-peer leadership will replace top-down leadership as the way to get things done and will require collaboration at levels never foreseen in the 20th Century.

Deference should go to the people who have or need the information. If an organization's goal is speed to market, and/or to better serve customers, a hierarchy wall will block individuals', teams' and leaders' ability to have the information they need to make timely decisions. It can make it difficult to solve problems using 360-degree vision, which must include people on the frontline. The challenge is for organizations to become honest and transparent so that problems can be identified and problem solvers can be chosen on the basis of ability and knowledge rather than pre-determined status. In this world of

The Four L's of Change

Leverage: Find and develop the most effective leverage points to gain the maximum payoff from each activity undertaken. Reduce waste of effort and resources whenever possible by focusing on enhancing the strengths of the organization rather than spending time on points of resistance.

Linkage: Connect all organizational initiatives and activities so they work together to create a total that is greater than the sum of its parts.

Leadership: Equip titled and nontitled leaders of the organization with the mindsets, behaviors, and skills needed to guide and model the bringing down of the walls and the opportunities for connecting that will follow.

Learning: Recognize the process of change as an act of continuous discovery. Understand that making mistakes is part of the learning process.

fast-paced change and multiple unknowns we cannot pre-determine who the experts are to solve every problem.

2. The wall of silos

Many organizations use defined boundaries, such as function, geography, education, etc., to decide which people and groups belong together. These silos prevent innovation and cross-discipline synergies, and they limit the spread of knowledge and successful practices. They cause the best opportunities of many organizations to be stuck in only part of the organization or in segmented parts that are not connected. The challenge is to build work units across functions and differences so that teams can gain 360-degree vision to better tackle the problems and make decisions.

Silos are no longer just an internal matter. The lines between organizations and their customers are blurring and will continue to blur. Customers are becoming less satisfied with simply consuming goods and services. Increasingly, customers want to belong to and participate with the organizations with whom they choose

to associate. To be successful, organizations must find ways to break down the silo walls that hamper connection between internal members as well as their external stakeholders, customers, suppliers, distributors, and investors.

3. The wall of differences

Today in most organizations, the wall of difference is hampering individual and organizational higher achievement.

Many people have trouble seeing and valuing others' differences. Today's organizations face generational struggles around enabling young people to fully contribute and not have to "wait their turn"; maintaining the energy and commitment of older workers who are feeling "pushed out"; and retaining the knowledge and skill of workers approaching retirement. While differences of gender, race, and ethnicity continue to be an issue in many organizations, differences of age, nationality and language are growing issues as well.

The challenge is to see differences as added value and assets to be leveraged, and to embrace differences rather than be fearful or dismissive of them. People need to accept others' frames of reference as true

for them, listen as an ally, lean into their discomfort, and create a sense of safety for self and their team members. Differences in gender, color, nationality, language, location, style, and age need not be barriers to partnership, teamwork, and connection.

Differences in people create opportunities. People with the same backgrounds and skill sets have little to teach one another. Their contributions will tend to overlap and be redundant. People with different sets of experiences and problem-solving styles are much more likely to add different perspectives to a group, stimulating new thinking in each other and assisting the group in moving closer to a 360-degree view of a situation.

4. The wall of individual as hero

No one person is smart enough to address the complex issues that organizations face today. No one individual can be the repository of all information or knowledge. Even if one person could do it, no organization can afford to allow one person or one group to be the only source of any key competence. Yet many organizations still foster an atmosphere and culture of competition, promoting and supporting people who act as "Lone Rangers" and "High Noon" heroes.

The challenge is to break down the wall that has people believing that individuals alone can succeed. Organizations also need to foster a mindset of competing *with* instead of competing alone *against* their colleagues.

Moving Forward

With our organizations facing one of the greatest speed and amplitude of change in history, the need for competent OD practitioners to help organizations on their journeys to the future is greater than ever.

To address constant change, organizations more than ever need to embrace OD's traditional core values of creating humanistic, inclusive workplaces that enable all people to learn, grow, and do their best work. OD practitioners can assist organizations by building organizational values that promote continual learning, support

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personal development, foster conscious inclusion and reward collaboration and shared leadership.

For the field to remain relevant and effective, OD values must continue to be our bedrock. OD practitioners will need to be effective role models for values-led behavior amid a world where everything else is changing. The knowledge, comfort, and grace that we bring to the table in navigating expected and unexpected upheavals will be one of our most important contributions. Are you ready to make that contribution? Is the profession? The answer to those questions will define the future of the field.

The Benefits of Connection

Outcomes that can be expected with the creation of a Connected Organization:

» Constant increase of knowledge and ability.

» Open and easy flow of ideas.

» Willingness to raise alternative options.

» People seen as trusted business partners.

» Decisions made at appropriate levels.

» Open dialogue.

» Risks embraced.

» Innovation encouraged.

» Continuous improvement of practices and processes.

"As we become more wired, our focus turns to the sexy technology and away from the imperative to build trusting relationships on, around, and amidst technology."

OD Gets Wired

By Maya Townsend,
Barbara Christian,
Jo-Ann Hague, Deb Peck,
Michael Ray and
Bauback Yeganeh

"Computer-based technologies and the evolving internet are not just tools. They are attributes of a new world… a new frontier… in which we must move and live. Living in cyberspace requires the marriage of the human and computer… the human and the internet. Cyber-OD must evolve to address human collaboration within the cyber-realm."

Sandy Speake and Jo-Ann Hague presented this manifesto for our intensely wired world at the 2007 OD Network conference. The Cyber-OD concept is an acknowledgement that OD practitioners cannot simply apply the Internet and other computer/web-based technologies to OD activities. Instead, practitioners must recognize that cyberspace is a unique world requiring the uniquely-designed integration of cyber-resources with OD strategies, thereby creating a new discipline: Cyber-OD.

Speake's & Hague's concept of Cyber-OD pulls us into the world of science fiction, imagination, and possibility. What will our organizations look like when we merge human and computer? What must we as OD practitioners do differently to get organizational results? How will we, as a group of highly-trained people who care deeply about integrating humanistic values in the workforce and making companies better employers and neighbors, continue to bring who we are into this different world?

The challenges we will face in the wired world are foreshadowed by email, a technology that most practitioners now find essential to our clients and our practices.

Email usurped the jurisdiction once held by letter writing, memos, and fax and has transformed how we communicate. Most OD practitioners have adapted, albeit some with reluctance, to the reality that email performs a critical service in the business world and our practices. But technological change is accelerating and the challenges manifested by radically connected technology will only increase. How prepared are we as OD practitioners to evolve along with our wired world?

What are the implications for our tried and true methodologies? How must we shift in order to maintain our relevance and value?

In this article, we touch on several issues that arise for OD practitioners in the wired world. We identify three new facts of life in this world and propose roles and responsibilities for OD practitioners.

Three Facts of Life for the Wired World

To journey effectively in the wired world, OD practitioners need to consider the facts of life in this domain and their implications for our practices. Three facts of life in the wired world are:

(1) *People are radically connected,*
(2) *Collaboration trumps control, and*
(3) *We live in complex and constantly changing ecosystems.*

Although each topic is deep and rich, we explore these issues only briefly and examine what they mean for us as OD practitioners.

People are Radically Connected

Today, people are radically connected. Over 400 million people worldwide are broadband subscribers (Kelly, 2006) and, as of 2002, there were 631 million internet users (Worldmapper, 2007). The extent of technological connection, plus improvements in travel and the globalization of business, has reduced the distance between people of different backgrounds, cultures, and ethnicities.

This deep and pervasive connectedness causes multiple challenges for our clients. They must link across language, geography, time zone, experience, and other boundaries. The obvious tool for organizations is technology. It's cheap and easy to connect people via web conferences, *wikis* (collaborative web spaces), discussion boards, and social networking applications.[1] Yet, companies have not yet learned how to develop the rich conversations and deep trust that can be achieved through face-to-face engagement. And, as Dr. Karen Stephenson asserts, trust-based relationships are essential for complex initiatives to succeed (2007). In fact, winning projects are run by people with a more balanced and positive network of trust (Stephenson, 2006). As we become more wired, our focus turns to the sexy technology and away from the imperative to build trusting relationships on, around, and amidst technology.

Dr. Barbara Fredrickson's (1998) *Broaden and Build Theory of Positive Emotions* reveals that positive emotions lead to a broadening of momentary thought-action repertoires. This broadening enables discovery of new and creative ideas and actions, which in turn expand personal resources, intellectual resources, and/or social resources. Inversely, as fear increases, our ability to think and act in new ways decreases.

Our challenge as OD practitioners is to help people engage in generative conversations and leverage emotions despite being challenged by constant change, new technology and numerous cultural differences. Our role is also to help clients understand the importance of trust-based relationships and help them build trust in the wired world.

Collaboration Trumps Control

Today's organizations deal with knowledge more than ever before. Manufacturing jobs have been shrinking since 1970 (Organisation for Economic Cooperation and Development, 1994). Replacing these jobs are services, which account for more than 75% of the U.S. Gross Domestic Product and knowledge-based work, which comprises more than 50% of the world's Gross Domestic Product (Kelly, 2006, using OECD data).

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In a manufacturing world, it's possible to exert a fairly sophisticated level of control over products and intellectual property. In a world in which knowledge provides competitive advantage, it's much more difficult: the knowledge is too complex to house in one person or organization. And it's too widely dispersed to control.

Organizations have begun to engage in radical methods of collaboration in order to pool knowledge, innovate, and reap the benefits of creative tension. For example, pharmaceutical giant Eli Lilly supported the incubation and launch of Innocentive, a highly successful organization that allows companies to post scientific and research challenges. Anyone from a Siberian biologist to a Chilean software developer can submit potential solutions to the challenge. Winners can receive monetary awards of $100,000 or more (Burge, 2007).

In a more public example, Will.i.am, a member of the Black Eyed Peas pop group, collaborated with stars such as Kareem Abdul-Jabbar, Scarlett Johansson, Tatyana Ali, Amber Valetta, and Herbie Hancock in early 2008, to create a video that overlays music on a speech given by then-presidential candidate Barack Obama. The resulting video has been watched millions of times on YouTube.com and gained significant attention for the Obama campaign.

In this kind of world, transformation of knowledge and creativity into results differentiates successful organizations from struggling ones. This calls for engaging and collaborating with customers, innovators, and subject matter experts in different ways than in the past. It also means reaching across organization and role boundaries to create new opportunities, encourage connections between synergistic but dissimilar entities, and transform creative tension into results. We can help by supporting individuals and organizations to leverage, share, and transform knowledge.

Organizations are challenged to create the social, environmental, and technical environments needed to foster collaboration, innovation, and growth. Larry Huston, who for many years was responsible for knowledge and innovation at Procter & Gamble, spots future competitive advantage for organizations in nurturing innovation networks (Knowledge@Wharton, 2007). These networks consist of people, institutions, and companies inside and outside an organization that can be tapped into to help solve problems and find new ideas. In order to involve the outside world, focus has to be put on creating architectures for participation.

Our role as OD practitioners is to help our clients create spaces in which they can exchange knowledge, both inside and outside formal organizational boundaries, and transform ideas into results. Our role

is also to help create conditions in which knowledge can be shared and transformed from tacit and discrete data points into overt and synergistic innovation.

We Live in Complex and Constantly Changing Ecosystems

Today's organizations are deeply connected through complex webs of interdependencies called ecosystems.[2] 90% of CIOs surveyed by *CIO Magazine* outsource some percentage of IT labor, creating multinational relationships in order to complete daily work and mission-critical projects (CXO Media, 2008). Other evidence of deep interconnection abounds. This integration goes far beyond outsourcing to

Rapidly changing market conditions require agility, flexibility, and the ability to change from samba to rumba mid-dance. We believe our role as practitioners will be to help our client systems find coherence amidst change and levers to enable effective change. Three of the many methodologies helping us find coherence emerge from complexity, positive deviance, and network analysis.[3]

Our role as OD practitioners is to help people name patterns within their systems and their impact on the efficacy of organizations. It's also to help people find levers: the people of influence and the energy for change within systems that can be used to redirect, motivate, and focus attention where it is needed.

As conglomerations become more complex, organizational behavior becomes less predictable since their components are not only connected to each other but influence systems separated by time and space. Through interrelation of elements or connectivity, a system emerges that can't be explained sufficiently by analyzing its parts. We are compelled, as OD practitioners, to help our clients shift their thinking away from mechanistic models to other ways of thinking about organizations.

innovative alliances, cooperation between competitors, and blurred boundaries between organizations.

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In the process, we need to update our thinking as well. The time of unfreezing-changing-freezing is long gone. Our client organizations are in constant flux. Multiple change initiatives occur simultaneously.

The Next Frontier

We can see the environment changing around us. We must change along with it. The role of the OD professional is to help lead our clients to embrace and thrive within the new organizational ground rules of Radical Connection, Collaboration Trumps Control, and Complex Ecosystems. Our responsibility is to encourage clients see beyond these challenges to their implications and promises for the future. Our charge is to steward them into the new, cyber-OD frontier and to understand the conditions that comprise this new and exciting world. As long as we can continue to evolve OD to meet the changing demands of our clients and our world, we will have a place in the future. Long live OD!

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> "As individuals increasingly take advantage of the ubiquity of the Internet and mobile devices to enact their workplace anytime and anywhere, the notion of the workplace as a singular place, dedicated to work performed in a predictable timeframe may be evolving towards a more amorphous space ..."

Mobile Work Practices, Blurring Boundaries, and Implications for OD

By Loni B. Davis

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One of the major ways that the ground is shifting for OD today is quite literally in the client venue. As individuals increasingly take advantage of the ubiquity of the Internet and mobile devices to enact their workplace anytime and anywhere, the notion of the workplace as a singular place, dedicated to work performed in a predictable timeframe may be evolving towards a more amorphous space that takes on the individual spatial and temporal requirements of the individual worker. Minimally, if we consider the recent much publicized decision of Yahoo's new CEO requiring that her employees return to working in the office and the less public actions of several large employers who are letting real estate go and asking their employees to work at home, it is apparent that the boundaries of workplace are in flux.

What is the import of this shift for our work as OD practitioners? This article offers a context for addressing this question by presenting a glimpse of how employees are beginning to grapple with these changes.[1] First a brief case is made for the scale and depth of this change. Some recent data is then shared that reveals how employees are experiencing and making sense of boundary shifts in the workplace as they reflect on their mobile practices in relation to work. Finally, grounded in the data, is a discussion of the implications for OD practitioners.

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1. *This article draws on some of the interview data from the author's dissertation research (Davis, 2013)*

What Has Really Changed?

> As the portability and connectivity of our laptops, mobile devices, and other tools improve, the range of locations that we are able to turn into viable personal workspaces continues to expand. (Youngblood, 2008)

For the past two decades a variety of work studies scholars have studied and written about consultants, part-time workers, and employees whose work requires travel and/or remote work in the context of specific arrangements such as teleworking, home working, and remote working (Ladner, 2009; Wilks & Billsberry, 2007). OD practitioners have offered frameworks and approaches for working with virtual teams, remote workers, and globally dispersed organizations. However, when employees enact the workspace in multiple physical environments and at multiple times throughout the day using mobile devices, this goes beyond these earlier discrete types of work arrangements.

My OD colleagues and I have observed that work previously bound spatially and temporally to a defined workplace is now routinely done at home, in a car, or within the kind of public spaces (e.g., Starbucks) that have been described by Ray Oldenburg as "third places" (1991, p. xvii). This includes individuals who have a dedicated office space within the organization that employs them, but who, nevertheless, opt to use mobile devices to do their work at other times and places of their choosing. In fact, current data (for the fast growing

knowledge/service sector) indicate that the number of individuals using mobile devices to work outside conventional time and place boundaries is increasing across all categories but especially among those employed full time by organizations (Halford, 2005; The Deringer Research Group, 2009).[2] Given that digital technologies continue to converge and move to a mobile platform, a strong case can be made that "mobile work practice" will continue to diffuse throughout a greater segment of the population.

As the overall ecology of workplace changes then, how do OD practitioners get their arms around what this means for their work? One pathway forward is to pay attention to how employees and managers are making sense of these changes themselves. The next section offers a look at how employees are beginning to grapple with these changes as revealed in this author's as well as others' research. The following discussion organizes employee reflections on changing or blurring boundaries into three specific areas: (1) decoupling of work and place, (2) shifting temporal boundaries, and (3) evolving work place norms in the context of using mobile devices to perform work.

The Decoupling of Work and Place

Space and a Sense of Belonging

> Much of my mobile work occurs here at home . . . or on the plane, in an airport, in the car, at the doctor's office, at my daughter's _____ (fill in the blank) practice and just about anywhere else there are a few minutes that allow time to check email, text messages, or make phone calls. (Frank)

The above quote represents an increasing reality of workplace for many employees. Unlike the conventional conception of workplace, employees described their

workspace enacted with mobile devices in a way that was very specific and tailored both in its physicality and meaning to each of their own needs and proclivities as well as to their individual preferences for "blurring" that space with home and leisure spaces. As one participant said, "Is there a workspace any longer?" Indeed, as some are beginning to suggest, our language has not caught up with our mobile practices and "what is needed is a redefinition of the workplace" (Harrison et al., 2009, p. 62).

Although the workplace has lost some of its legacy as a brick-and-mortar destination in people's minds, employees expressed that some sort of physical connection to space or place is still important. One employee interviewed spoke about "feeling a strong sense of place . . . having a desk that has my stuff on it . . . my mess, you know . . . a feeling like the space is mine." Since his work was highly mediated by mobile devices and he worked out of several spaces, he spoke of the difficulty of "staking out his claim to workspace" and how instead he would just hunker down with his laptop, smartphone, and a pair of headphones to somehow designate his temporary mobile workspace. Other individuals indicated that they sought out spaces in their homes, as well as nested temporarily in client offices, coffee shops, airplanes, and airport lounges to achieve some kind of work rhythm, routine, and role. This speaks to the powerful relationship between space or place and belonging on the one hand and also to how provisional this quality of space is becoming as mobile devices allow individuals to become untethered from a fixed office space.

Empty Space and Copresence

A related consideration is what happens to the organization's physical workplace as employees "go mobile" – how do employees left back in the office view that space? In her study of spatial shifts in an organization that recently instituted a policy of home working, Halford (2005) referred to the "*hollowing* out of the fixed organizational workspace," with work being relocated in the home or virtual space (p. 19 , my italics). Employees that I interviewed echoed this same notion as they observed

changes in what used to fill the space in the traditional office—whether that was people, artifacts, purpose, or vitality.

> Our offices or cubes used to be our home away from home—a place you could nest and have some real personality. As I walked through the office today, I noticed that most cubes were quite sterile. People just aren't there enough to want to give it a sense of permanence or commitment. (Jackie)

Perhaps to counter the growing empty office, some employees indicated purposely seeking out a space with noise and people in which to do their work, a kind of being with others that has more recently been referred to as "copresence." For example one individual reflected:

> Sometimes I will mix things up and go to a coffee shop to do work, and treat myself to a yummy dessert or drink, and sit with tons of other people behind their laptops doing whatever it is that they do. There's some comfort in working with strangers like that . . . I don't know why, but I like it. (Debbie)

Other employees spoke of the difficulty of thinking creatively in the sterile, silent cubicle-filled office space. One individual said her mobile devices allowed her to hop on the local transit to the Ferry Building in downtown San Francisco, which was full of colorful noise and chatter, a work space she preferred for "thinking out of the box" that her work often called for.

Connecting with Coworkers

Some employers are beginning to rethink the purpose of "office space" in light of mobile work. One individual described that her employer designed their office space first and foremost for connection and building relationships among coworkers with several "hang out" areas, murals on the walls, and comfortable couches. She reflected that she valued her workspace at the company office for "building connections" and her workspace at home for being "efficient and productive," using her

mobile devices to work. I was struck by the reversal in her case of the traditional purpose of work and home spaces.

Popular press often emphasizes the isolation of those who work via mobile devices at home or en route. However, my inquiry showed employees were quite mixed on this issue from those who insisted there is just no substitute for face-to-face interaction in developing good relationships with fellow workers to one employee who eloquently described the depth of connection with his virtual community of colleagues:

Sometimes it was funny, you'd hear a dog barking in the background of a conference call, or infants cooing, and even once a washing machine beating when it became unbalanced. These occasional interruptions served to bring the remote workers closer together. I can easily say that the coworkers from my Motorola days with whom I worked most closely, and whom I became socially close to, were more often the remote workers instead of the on-site workers. I am still friends with several of them even years later. Because work and life were melded rather than balanced, it seemed quite natural to become close to my coworkers in a way that I did not do in previous jobs. (Jeremy)

Shifting Temporal Boundaries

The Malleable Workday
The 9-5 workday is a deeply entrenched part of the larger cultural script relative to work time—at least in the US. This notion is so embedded that even those who enact much of their work through mobile devices at all times of the day think of themselves as working a "normal" schedule. For example, one employee remarked, "I do keep set hours . . . I start at 7:00 a.m. and I'm done by 7:00 p.m." However, a little later she noted, "Saturday, I might sleep with my iPhone near my bed . . . so when the alarm goes off, I pick up the phone and I look at my e-mail. I'm most often getting up early enough to see what's going on overseas"

and "it's not uncommon for me to sleep with my laptop in bed." Or, another individual (in this case a public school teacher) commented, "I work at school 9:00 a.m. to 3:00 p.m. and even though I work at home a lot [using both her laptop and smartphone], I don't think of it as my work time."

More typical of those enacting work through mobile devices is the following individual's description of his work time:

In general, the line between work time and "my time" is blurred. My access to various mobile devices defines my work time far more than a clock or calendar. When I'm working from home, it sometimes takes me 16 or 18 hours to complete 8 hours of work. It's not that I'm particularly inefficient, but more that the ready access to mobile work devices allows me to have great flexibility in when and where I work. (Frank)

As employees shift to a more improvisational workspace, there is an observable collapse in the distinction between the domains of work and personal-leisure in their overall lifespace. However, newer research as well as my interviews suggests that employee sensemaking about this shift reveals a spectrum of preferences for blurring and blending work and home and work and leisure (Halford, 2005; Ladner, 2008; Tietze & Musson, 2005). Consider the following disparate comments:

I feel like there's really no beginning and ending with my use of mobile devices for work and play. Depending on the day of the week and time they are all very interrelated. I like the flexibility of blending and blurring work and personal. (Jill)

I've learned there's work time and personal time and I've learned that I cannot blur the two...I don't function well . . . I'm not good at work and I'm not good at anything else if I'm constantly working. (Ann)

The New Responsiveness
In addition to the workday becoming more malleable, mobile devices seem to have increased the temporal pace of work for many.

Things are time sensitive, so I am constantly checking my phone and email and responding immediately to anything that comes to me. I try to set up my work environment so that I never miss a thing and can respond to incoming activity in as close to real time as possible. (Jeff)

I've sat in bed answering emails before I go to sleep, but this inevitably leads to what my colleagues and I call "evening escalation" —the process where someone answers an email you sent them at 11:00 p.m. almost immediately and it goes back and forth until someone decides they've had enough. I've had this go on for quite a while—over an hour in some cases, just because I didn't want to have to deal with something the following day. (Ira)

Individuals indicated that constant connection and response is the only way that they are able to manage increased throughput and "stay on top of things" in their work. They provided descriptions of working on vacation, checking mobile devices at 5:30 a.m., being able to work while sick via mobile devices, and using every spare moment such as waiting at the airport to respond to emails. Interviewees did express wanting to reduce their workload, avoid escalation of problems, and get closure. For example, one employee remarked that, "The more I use mobile devices for work, the more I can get done in real-time and the less I need to do when I sit down in front of my computer." Another described his week away from the office at a conference when he received 80 email messages in a twenty-four hour period and said that "Without mobile devices, it would have been impossible to respond to so many emails in a reasonable amount of time."

Managers interviewed were also concerned that their own tendency to use their mobile devices to respond immediately set up their employees to work in the same kind of way. One reflected that he probably should not be sending out notes or emails after 10:00 p.m. as one of his employees had commented, "I'm not always working at 11:00 o'clock at night. You know that, right?"

Evolving Workplace Norms

Appropriate Channels, Signaling Availability, and Mobile Practice Etiquette
Norms around appropriate channels and style of communication are evolving as more employees enact their work through mobile devices. For example, when is it right to use texting vs. email? Is tweeting okay or better left for informal chatting? One employee even commented on the subtleties of working with different cultures via mobile practices:

> I used to work a lot with the Chinese when I was at Motorola and I learned that conference calls with them are not especially productive but Instant Messages could work great because there was usually a delay on the Instant Message, and what they were doing really I believe is, something would come through in English and the person on the other end who has the knowledge we need may not have the best English but he is talking with a guy who's English is better than his talking in Chinese about what the right reply ought to be. There's a bit of a delay and then he replies. Now, on the phone, that is harder to manage without losing some face. (Jeremy)

Many organizations use a unified communications application (e.g., Microsoft Office Communicator) that enables their employees to communicate and collaborate easily and securely while in different times and locations as well as indicate their available status. However, employees noted that such tools as indicating you are "in" and "available to talk" are often ignored or used inconsistently and, therefore, cannot be trusted. Sometimes they are even a source of frustration as one employee comment indicated:

> So then you know I've had it happen where I've reached out to someone and started asking them a question and they say "I'm busy. I'll get back to you." Okay I respect that. You're busy. You'll get back to me. But, you know, then change your darn status to say you're busy right now! (Ben)

Employee comments indicate that another area of contested norms is the social etiquette of mobile device use. One employee described a recent meeting with her manager:

> I had a meeting with my manager today to discuss some serious topics about a conflict that we had on Friday and some serious issues regarding my current position and potential new opportunities for me within the company. I had my mobile device set to silent at the beginning of the breakfast meeting so that it would not interrupt us. My manager however, had his on vibrate, which it proceeded to do throughout the entire meeting. It was very frustrating, and I was more than a little annoyed. (Kerry)

Individuals seemed particularly conflicted about the use of mobile devices in face-to-face office meetings:

> If I have a meeting, I tend to take a mobile device (either my phone or my laptop) to work on or use to accomplish other work if I feel like I'm not really needed at the meeting. In general, I've found that it's preferable if I bring a laptop or my iPad - people tend to see use of a phone in a meeting as rather disruptive. (Ira)

On the other hand, another commented "I don't want people to be looking at their laptops in meetings." One employee described it as rude that "People would walk in, open up their laptops, and just continue working, obviously doing all sorts of other things during the meetings." An older employee hinted that it's a generational issue: "I do think maybe this is because I'm old and grey, but I do think that somebody checking their Facebook in the middle of the meeting is completely inappropriate."

When workplace norms for mobile devices touch on issues of privacy, respondents often express ambiguity and frustration:

> On Mondays and Fridays usually I have three conference calls at least and the thing is I don't quite know if it's acceptable for me just to take conference calls when I'm sitting in that open space . . . There's enough ambiguity that I sort of don't really know what the acceptable boundaries are. (Ira)

> I had a college professor, a piano instructor that had passed away a couple of years ago. I was right in the middle of a PeopleSoft implementation, and I went home to San Antonio for the service, and they're texting me and calling me in the middle and this is a Sunday or a Saturday, I don't remember... and really, I mean, it was not only embarrassing, it was really anger provoking. It's like you're incurring in my space. (Ryan)

Boundary Clash
Participants' reflections on mobile practices and workplace norms struck me in terms of their potential for what I would call "boundary clash." Given the lack of consensus regarding what is appropriate at this juncture with everything in flux, people are bound to bump into each other's psychosocial boundaries (norms). The boundary clash is further fueled by the absence of discussion among coworkers about individual preferences. One employee observed that "the lack of explicit discussion created expectations and anxiety." Another reflected that even though he had told his team he "goes dark on Saturdays," there probably needed to be more explicit discussion about norms in regards to some of the

other mobile practices such as emailing late at night and texting over the weekends. One employee summed up the dilemma in this way:

> I don't see it as just a change in where people choose to work or what hours people need to keep. I think there needs to be probably much clearer communication about how people prefer to work in every which way ... and I don't think it's something that everybody who works together in a particular work environment needs to be in sync about. They just need to be aware of it...especially as workplaces become more flexible...that is, I mean if boundaries are going to be flexible then we need to maintain some mutual level of expectation. (Ira)

Implications for OD Practitioners

There are both overt and subtle implications for OD work as mobile practices to enact workplace continue to proliferate and alter the spatial, temporal, and psychosocial boundaries of workplace. I believe there are four major areas.

Organization Design
One important implication is the future design of workplace, given the shift from the straight forward employer-defined workspace to an increasingly idiosyncratic workspace enacted by individuals through mobile practices in multiple locations and times. There is no one-size-fits-all office space anymore; we are rapidly moving away from the practicality of the cubicle, and there is no viable e-cubicle yet. OD practitioners could be very instrumental in helping organizational leaders think through and be intentional about the purposes of bringing employees together into a common physical workspace. In particular, the assessment and consideration of possibilities will be less about performing concrete work and more about the intangibles of building community and teamwork, developing organizational identity, and creating forums to network, exchange ideas, and foster creativity. Designing for this shift in workplace may also present

interesting interdisciplinary opportunities for OD practitioners to work with facilities planners and those focused on sustainable organization design.

Managing a Mobile Workforce
How to manage an increasingly mobile workforce is a second important implication of the altered workspace. One manager I interviewed summed up the dilemma:

> How do you manage that because they're not there? You can't see them. You don't know if they're doing a good job or not doing a good job and it's—so you go from being a manager of time and place and yup, he's still here. Well, look, it's six o'clock and the guy is still in the office. He must be a good employee. (Frank)

OD practitioners will be called upon to provide coaching and leadership development that supports managers in learning how to segregate the work and work products from the work methods. Shifting from focusing on supervising where, when, and how individuals work to identifying, clarifying, and sometimes negotiating accountable goals and deliverables with employees may require different kinds of management skills (e.g., project planning and coaching) and, for many, a different mindset. Managers may need to develop much stronger team building skills as workers disperse and there is a need to create and implement venues for employees to connect and build relationships with coworkers.

Managers will likely benefit from coaching that helps them to be reflective about the kinds of expectations that are conveyed to employees by their own mobile practices. As one employee shared:

> Sometimes I'll get an email from my boss on Saturday at 9:00 a.m. The immediate reaction is to drop whatever I'm doing and respond. The world of mobile devices has created this instant communication/connection mechanism, and if I don't respond right away, it's starts to feel unnerving. (Yael)

Organizational Culture –
New Norms for a New Kind of Workplace
As mobile devices enable a growing permeability between work and personal-leisure domains, individuals enact work in both "private" or "public" spaces and times. Research has indicated that the result is often contested terrain where previously accepted social rituals need to be renegotiated (Ling & Donner, 2009). My interviews with employees provided numerous examples of employee's stated confusion and ambiguity about appropriate norms to outright boundary clash.

In light of mobile practices then, employees are calling into question the appropriate psychosocial boundaries in the workplace that were once based on shared norms, agreements, and expectations about how they would behave with each other. If as Schein (2004) asserted, "Culture is a set of shared assumptions" (p. 148), then important work for OD practitioners is creating a process for that understanding to develop. Although existing understandings and habits will guide this renegotiation, the time-space fluidity enabled by mobile devices allow for such new possibilities, that new expectations and routines are likely to shape unique future norms.

Employee Well-Being in a
Less Bounded Workplace
As work becomes embedded through mobile practices in what Mazmanian et al. (2006) described as the "micro-moments" of individuals lives, the conventional notion of "work-life balance" based on the clear binary of work and personal may no longer apply. Yet most employee HR Programs in large organizations are built upon this paradigm. OD practitioners may be called upon to partner with their HR colleagues to support a shift that has implications for both organizations and individuals. Organizations will need to rethink paternalistic one-size-fits-all work–life balance programs to accommodate employees with a wider range of preferences for blending and blurring their work and life spaces in ways that uniquely support their well being as individuals. Given recent research validating the link between employee health, well-being, and productivity, they

will likely be motivated to do so (Harter & Agrawal, 2011).

Employees will need to consider that enacting workspace through mobile practices anytime and anywhere clearly offers them a dual-edged sword. On the one hand it provides individual autonomy, flexibility, and a sense of control to create a more tailored and satisfying lifestyle. In the absence of self-control, however, it also enables people to have 24/7 relations with work resulting in work-centric lives. Coaching individuals to develop a healthy and satisfying integration of work into their overall lifespace, and modifying mobile practices accordingly, will be critical to supporting employee well-being.

Conclusion

By sharing research on how employees are making sense of shifting spatial, temporal, and psychosocial boundaries of a workplace enacted through mobile devices, I have tried to provide a starting point for identifying the implications for OD practice in this changing landscape of work. Although I have summarized what I believe are some of the major implications, I am confident that my OD colleagues reflecting on some of this research and their own work with clients will come up with many others. When you are in the middle of a sea-change, it is very difficult to adequately sort out the implications and what should be addressed— but then this is the "edge" of OD work.

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A Powerful Distinction

How the Simple–Complicated–Complex Continuum Contributes to OD Practice

By Lisa Kimball

Over the past decade or so, insights emerging from the science of complexity have had significant impact on how we think about organizations, leadership, and change. Terms like self-organization, emergence, and adaptation are common in the literature and the evolution in our thinking is reflected in the transition from Newtonian, machine-based metaphors of organization to those based in biology and the natural sciences (Kimball, 2008).

One idea fundamental to this lens of complexity stands out as having the potential for extraordinary influence on OD practice – the idea that the situations, challenges, and problems faced by organizations fall into a continuum from simple to complicated to complex to chaotic.

The value of this distinction is that it goes beyond a conceptual framework and suggests specific tactical implications for working effectively in these different environments. It can help us determine:

» What leadership or management strategies we choose for a particular issue.
» How we explain and communicate to others why one approach makes more sense than another.
» Ways we organize multiple decisions and challenges.
» Whether, how, and when we introduce innovative practices that may perturb the system.

This article will explore this powerful distinction and how it can be integrated with frameworks that support three different aspects of OD practice: change, communications, and culture.

The Continuum

The insight that some organizational problems are simply not simple emerged from the observation that many organizations exhibit patterns of behavior that do not track with traditional management analysis based on linearity and predictable change. While, arguably, changes in the current environment require organizations to deal with increased complexity, organizations by nature are and have always been complex systems that do not fit snugly into fixed models.

The simple to complex continuum helps us understand that a characteristic of complex systems, including organizations, is that they operate in multiple environments simultaneously. Brenda Zimmerman defined key differences in the quality of simple, complicated, and complex problems (see *Table 1*).

Another example is the hospital ship, USNS Comfort that sits empty at the dock in Baltimore harbor. When the call comes to deploy – for example, to Haiti after the earthquake – multiple teams spring into action. Diverse medical and other personnel arrive from all over (with their home organizations having back-filled their positions). All the provisions needed for an unknown length of deployment are procured and loaded including medical supplies, food, extra light bulbs, chess games, toilet paper, and hundreds of other critical items. In as few as three days the ship is on its way. It is a logistical tour de force. But we can say that it is only a complicated problem. Computer models, spreadsheets,

checklists, and the expert knowledge of staff with experience of doing this before combine to ensure that everything goes like clockwork.

The ship arrives in Haiti. Now we have a complex problem. No spreadsheet or checklist or previous experience can predict exactly what the crew will face; unknown injuries, weather, politics, other organizations, pre-existing environmental factors, and a host of other "aftershocks" will impact what can be done and how. The leadership and other skills that work to support a smooth launch do not necessarily transfer to serve once the mission is on-the-ground. That requires a different repertoire of strategies. For example; engaging unfamiliar stakeholders in real-time needs assessment, experimenting and revising strategy quickly based on experience, and seeing potential opportunities to network and collaborate.

This gap in capacity has been recognized by the U.S. Army. As one Army leader put it, "We're first rate at dealing with complicated problems. In fact, it's not uncommon for other government and private sector organizations to come to us to learn how to manage large-scale, complicated logistics. But we're not as good at dealing with complex situations and we're finding that we have more of those to deal with." The challenge of operating in a community in Afghanistan requires a portfolio of skills including the ability to improvise, facilitate relationships, and engage with other organizations in ways that cannot be managed with a traditional project plan. For the past three years the Army has been introducing leadership development programs designed to build capacity to deal with complexity.

Understanding this continuum can help us see where we sometimes err in addressing organizational problems:

Disasters can occur when complex issues are managed or measured as if they are merely complicated or even simple. For example, our current approaches to dealing with mental illness focus on engineering the correct psycho-pharmaceutical intervention to fix the problem. The fact that many patients are too ill to adhere to their proscribed drug regimens is ignored as it demands of our specialists a level of interaction and adjustment most are not equipped to deliver. A new layer of expertise develops around forcing compliance to the drug regimens rather than crafting regimens and support systems that respond to the needs and circumstances of the patient. Addressing apparently intractable problems, crying out for social innovation, with methods, tools, approaches, and mindsets that are appropriate for complicated situations [can] at times give us a measure of false security; inevitably it gets us into trouble. (Westley 2007, p. 7)

Helping clients figure out whether their situation is complicated or complex (or, for that matter, simple) is a first step in helping them develop a shared understanding of how to prepare leaders and others to navigate their environment.

As OD practitioners, one of our responsibilities is to help organizations build capacity to operate in complex as well as complicated situations. Too often, even when leaders realize that standard operating procedures are not appropriate, they do not know what to do instead so they either try to force-fit what they do know or flounder.

Fueling Change

Ralph Stacey has been one of the most influential thinkers making connections from complexity science to organization theory. He was the first to suggest that organizations could be thought of as complex adaptive systems. In recent years, Stacey has evolved in his thinking and cautions that transferring analogies from the natural sciences directly to the human domain is invalid because it does not account for key qualities of humans such as consciousness, emotion, reflection, and self-conscious choice. He no longer describes organizations as complex adaptive systems. Stacey now focuses on

Table 1: *Zimmerman Definitions of Simple, Complicated, and Complex Problems*

| Simple, Complicated, and Complex Problems		
Following a Recipe	**Sending a Rocket to the Moon**	**Raising a Child**
The recipe is essential.	Formulae are critical and necessary.	Formulae have a limited application.
Recipes are tested to assure easy replication.	Sending one rocket increases assurance that the next will be OK.	Raising one child provides experience but no assurance of success with the next.
No particular expertise is required. But cooking expertise increases success rate.	High levels of expertise in a variety of fields are necessary for success.	Expertise can contribute but is neither necessary nor sufficient to assure success.
Recipes produce standardized products.	Rockets are similar in critical ways.	Every child is unique and must be understood as an individual.
The best recipes give good results every time.	There is a high degree of certainty of outcome.	Uncertainty of outcome remains.
Optimistic approach to the problem is possible.	Optimistic approach to the problem is possible.	Optimistic approach to the problem is possible.

(Westley et al., 2007)
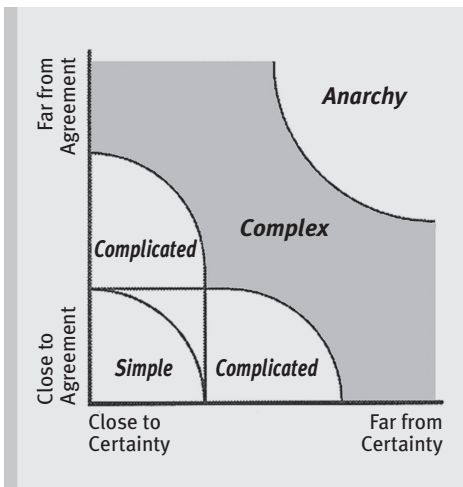
Figure 1. Stacey's Agreement-Uncertainty Diagram (Zimmerman et al., 1998)

complex responsive processes that reflect people's interdependence and intentionality as it shows up in their relationships (Stacey, 2003).

Stacey's early work included the "Stacey Diagram" *(Figure 1)* which is still in widespread use as a way to map organizational challenges – particularly those associated with organization change. The continuum of simple to complicated to complex to what Stacey called anarchy and others have referred to as chaos is produced by looking at whether the change of concern is nearer or father away from agreement and certainty.

The distinctions underlying the diagram suggest that tools and approaches appropriate to deal with change in the simple zone where people are predominantly in agreement about a situation and fairly certain about causes and effects are not useful as we move to different zones where there is a lot more uncertainty and lack of shared understanding (see *Table 2*). OD practitioners use this framework to facilitate the conversation in the organization to help them identify where a particular set of challenges sits and how they may need to change their strategy to match. It is important to note that Stacey himself has repudiated his own diagram because he feels it can be erroneously interpreted to mean that managers can somehow control where they are in this landscape and thereby choose what strategies and tools they prefer to employ. That interpretation contradicts a basic premise of the complexity framework: what happens in an organization emerges as a product of its intricate pattern of relationships and interactions and is, therefore, fundamentally uncertain and unpredictable. As long as the framework is used as part of a sense-making process it can be a useful tool for OD practitioners.

Plexus Institute has been applying the continuum in health care (Zimmerman et al, 1998) to address a range of problems and has defined some different ways to think about change strategies at different places in the continuum *(Figure 2*, next page*)*. But a critical insight is that elements of all these zones are present all the time. One part of the continuum is not necessarily a "better" place to be. Rather, what is important is to notice the reality of where you are around a particular challenge and work with it appropriately.

For example, much change work in health care is focused on quality improvement to implement one or another "bundle" aimed at changing behavior around something specific like beside care or infection prevention. This assumes that it is a simple problem of figuring out what to do and telling everyone to do it. While checklists can be very useful as a reminder about key protocols and training can increase skill for complicated procedures, they are not sufficient. They do not match the complexity of the challenge of making it possible for people in diverse roles to deal with emerging situations that often do not match the neat scenarios in the improvement plan. In one case, a physical therapist struggled covertly with work-arounds because the official infection prevention checklist required her to leave her patients standing up (which they were unable to do) while retrieving cleaning materials for wiping equipment. The continuum was used to catalyze a conversation with the hospital leadership about why the change process was not working as hoped. Understanding the desired changes in practice as complex resulted in strategies that engaged all staff in conversations about how to be true to the principles while, at the same time, allowing for site-specific accommodations.

Facilitating Communication

Another place where the continuum is helpful is in how we think about the full spectrum of communication in organizations. One of the biggest frustrations and challenges in organizations is the proliferation of meetings that feel unproductive and unsatisfying. At the same time, "lack of communication" is frequently cited as a

Table 2: *Stacey Diagram Definitions*

Close to Certainty	Issues or decisions are close to certainty when cause and effect linkages can be determined. This is usually the case when a very similar issue or decision has been made in the past. One can then extrapolate from past experience to predict the outcome of an action with a good degree of certainty.
Far from Certainty	At the other end of the certainty continuum are decisions that are far from certainty. These situations are often unique or at least new to the decision makers. The cause and effect linkages are not clear. Extrapolating from past experience is not a good method to predict outcomes in the far from certainty range.
Agreement	The vertical axis measures the level of agreement about an issue or decision within the group, team or organization. As you would expect, the management or leadership function varies depending on the level of agreement surrounding an issue.

(From EDGEWARE http://www.plexusinstitute.org*)*

critical gap that gets in the way of performance. The simple-complicated-complex continuum illustrates how and why we sometimes struggle and provides a framework that focuses on the landscape of communication rather than on judgment about individual behavior.

The nature of the kinds of engagement needed – including the frequency, volume, and degree of interactivity – differs depending on where the work falls in a communication landscape (see *Figure 3*). We might think of different communication needs and challenges as being relatively simple or relatively complex.

One dimension describes how individuals or teams are working from autonomously to interdependently. Working with a global pharmaceutical firm it was clear that there were some tasks unique to a specific country that team members could do on their own without interacting with anyone else in the division. Other product-related projects required more collaboration among team members in different parts of the region. The other dimension describes the extent to which patterns of work – the problems, tasks, day-to-day activities – are repetitive and routine, whether these patterns are changing, or whether new patterns are emerging. There were some regions of the firm where a combination of a new political environment and new competitors created radically new circumstances whereas other regions continued to operate effectively using established ways of working.

The organization brought the staff in from multiple regional offices to grapple with what they described as "communication issues" – a problem that had been turning up repeatedly for a long time. The continuum provided a starting point to help the group distinguish whether, where, and when different modes of interacting were needed. In the past, these meetings produced a variety of new communication structures and commitments to "do better" about sharing, but the half-life of these changes was usually short. This time, they reframed the problem by differentiating what and how to communicate by thinking in terms of a communication landscape.
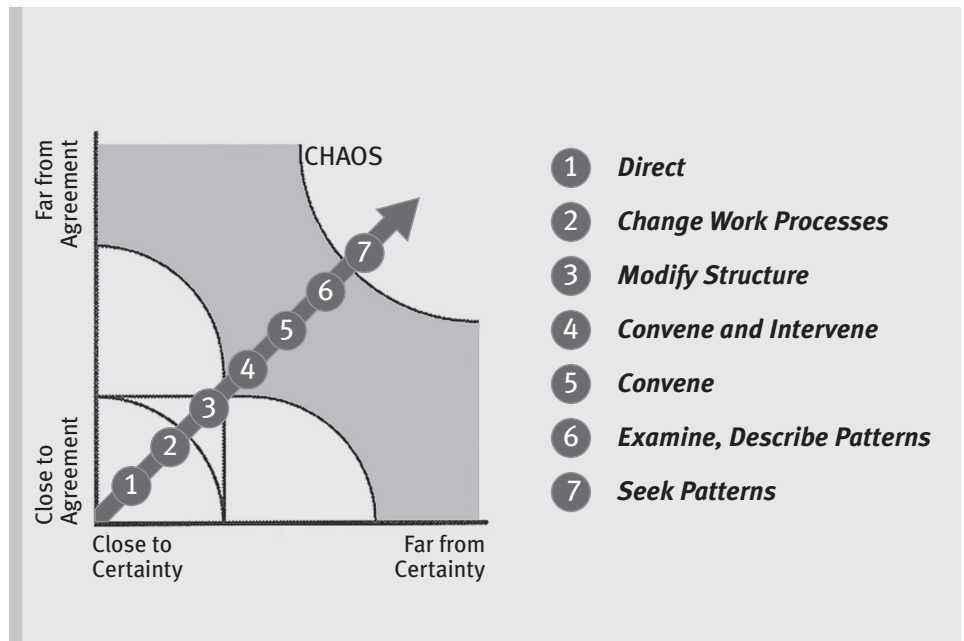

Figure 2. Change Strategies for Different Parts of the Continuum
(http://www.plexusinstitute.org)

To the extent team members were working autonomously on routine tasks there was little need to meet and interact. Communication needs were simple. Technology enabled exchange of information easily without requiring tedious "update" meetings. Where things got a bit more complicated because of increased interdependence, more deliberate strategies for sharing were required. Here is where many familiar tools and processes for managing access to information and expertise as well as providing good systems for scanning and picking up important signals from the environment add value. The most important insight emerging from the group's conversation was that they needed to make a bigger effort to make time for the generative conversations required to collaborate on emerging challenges. Rather than blaming concerns about over- and under-communication on personalities or infrastructure failure they began to design a communication plan for their complex needs.

Understanding Culture

The High Performance Programming Model (HPP) (Nelson & Burns, 1984) (*Figure 4*) provides a framework for looking at different elements of organizational culture. The body of the model is made up of four frames which distinguish
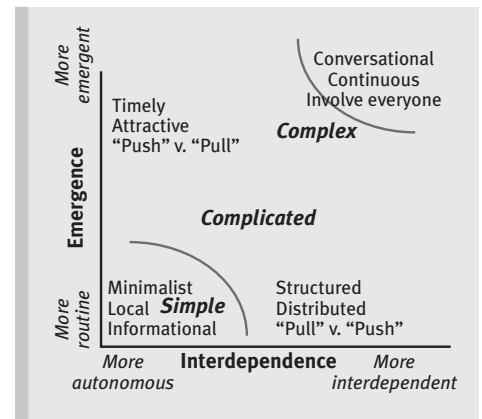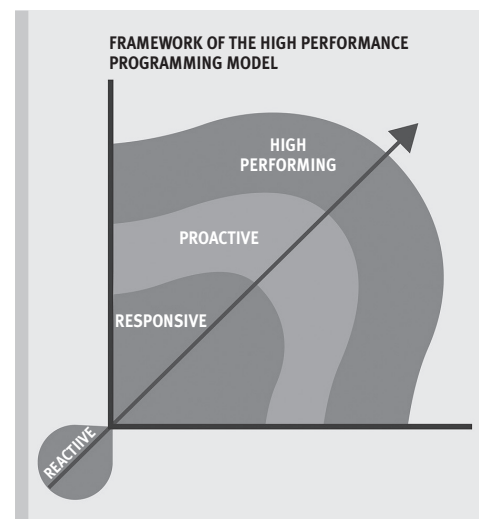

Figure 3. Communication Landscape
(http://www.groupjazz.com)

Figure 4. High Performance Programming Model (Nelson & Burns, 1984)
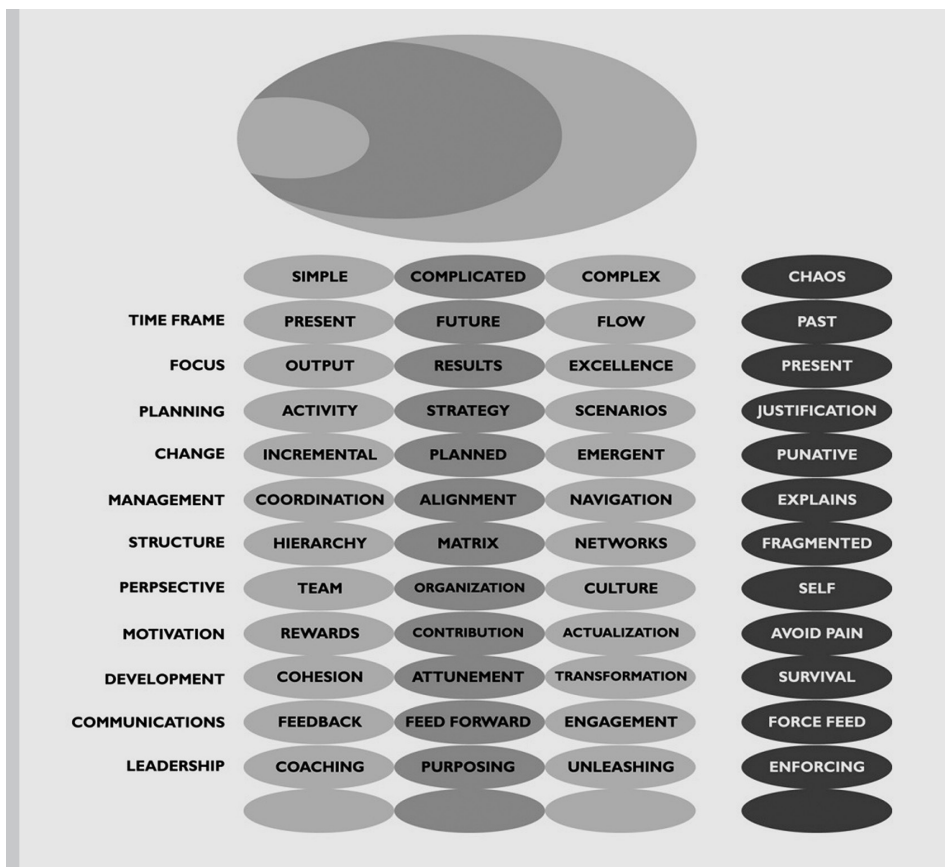
Figure 5. HPP Framework through a Complexity Lens (http://www.groupjazz.com)

	SIMPLE	COMPLICATED	COMPLEX	CHAOS
TIME FRAME	PRESENT	FUTURE	FLOW	PAST
FOCUS	OUTPUT	RESULTS	EXCELLENCE	PRESENT
PLANNING	ACTIVITY	STRATEGY	SCENARIOS	JUSTIFICATION
CHANGE	INCREMENTAL	PLANNED	EMERGENT	PUNATIVE
MANAGEMENT	COORDINATION	ALIGNMENT	NAVIGATION	EXPLAINS
STRUCTURE	HIERARCHY	MATRIX	NETWORKS	FRAGMENTED
PERPSECTIVE	TEAM	ORGANIZATION	CULTURE	SELF
MOTIVATION	REWARDS	CONTRIBUTION	ACTUALIZATION	AVOID PAIN
DEVELOPMENT	COHESION	ATTUNEMENT	TRANSFORMATION	SURVIVAL
COMMUNICATIONS	FEEDBACK	FEED FORWARD	ENGAGEMENT	FORCE FEED
LEADERSHIP	COACHING	PURPOSING	UNLEASHING	ENFORCING

characteristics of organizations with a reactive culture from those whose culture includes responsive, proactive, and high performing aspects. A key principle of this model is that, with the exception of the reactive mode, these different ways of operating are "nested" such that each is an extension building on and incorporating the one before. No organization is operating in a single frame as a whole just as organizations are always facing a mixture of simple, complicated, and complex challenges.

Looking at the HPP framework through a complexity lens can provide new insights about organizational culture. The responsive, proactive, and high performing frames align with much of what we know about simple, complicated, and complex environments. We could use the associated characteristics with clients as indicators to help them make sense of how and why strategies do and do not match where they are on the continuum. For example, in simple situations, it is fine for planning to take the form of developing linear lists of action steps, whereas, in complex situations,

scenarios are more effective because they take into account that multiple future possibilities exist as new phenomena will emerge over time.

The global pharmaceutical company, mentioned earlier, used the HPP Framework *(Figure 5)* to kick off a series of dialogues designed to reflect on how effectively they were dealing with huge changes – both internal and external – in their organization. They asked themselves whether and where they noticed things that might indicate floundering rather than thriving on turbulence. For example, they observed that some managers were becoming very protective of their team and investing a lot of energy in explaining what they were doing and why. In contrast, those with the capacity to operate effectively across the simple-complicated-complex spectrum seemed to have more flexibility. They had a larger view of organizational priorities, provided critical context to help others make sense of complicated initiatives, and facilitated processes that provided room for everyone to be engaged in grappling with complex challenges.

Exploring cultural differences across the continuum provided a lens that stimulated important conversations.

Accessing the Full Spectrum

An area that merits future exploration is how to deal with the end of the continuum labeled "chaos." In nature, the edge of chaos is considered a highly dynamic and creative place with just the right amount of perturbation and conditions that provide a safe space for experimentation. But it is a fine line. Organizations that participants describe as being chaotic tend to exhibit the cultural characteristics of reactive organizations where there is a focus on the past, justifying the status quo, and trying to deal with the feeling of losing control by creating and enforcing more rules. We need to learn to navigate in that tricky space where there is enough but not too much flex and ambiguity in the system.

A new view suggests that beyond coping with chaos, it might even be a good strategy to create some (Brafman, 2013). Brafman asks, "What if there is another side to chaos—a benefit?" What if it is actually crucial for inspiring industry innovation and disruption? Instead of struggling with the ineffective responses associated with reactive organizations are there strategies that can allow an organization to operate at the edge of chaos in a healthy way? Three elements can be harnessed for greater effectiveness in the midst of chaos: white space, unusual suspects, and organized or planned serendipity.

Creating a bit of white space, or a blank canvas, for example, can make room for unusual suspects – unlikely thinkers or participants who are not part of the system or group – to suggest new insights and ideas. How do you make sure you have enough diversity in the group to create conditions for new ideas to emerge? Deliberately bringing in voices from outside the organization can be powerful. Another strategy is to establish a norm that whenever someone says something like "they" or "those people" the conversation stops. Who are they and how can we invite them

into the conversation? When people not in the room are mentioned it is a good indicator that unusual suspects are missing who need to be there. Another simple but effective strategy for creating white space is to incorporate some silence in a meeting. Even one minute of silence before jumping into a discussion transforms the environment. A minute of reflection is not just for the introverts in the group. All participants have an opportunity to be fully present, leaving their last meeting, phone call, travel time, and so on, behind.

Organized serendipity sounds like an oxymoron. It is really about creating the conditions for serendipity, and, perhaps even more often, removing obstacles. It is a great example of the loose-tight interaction designs we need to thrive in chaos. Some organizations have found ways to do this with architecture. The Scandinavian Airlines' headquarters building outside Stockholm was built on the model of a village enclosed in glass. There is a solar heated internal "main street" with shops, restaurants, and coffee bars along a winding stream. The idea was to promote informal meetings between staff at different levels and from different departments as they found themselves together in quasi social settings. A global pharmaceutical company introduced serendipity into their virtual meetings by scheduling a monthly teleconference called a "dinner party call" without an agenda. They invited participants to imagine they were around a table having the kinds of conversations they had in the evenings at off-sites. Participants looked forward to these opportunities where unexpected ideas emerged from conversations not limited to the day-to-day focus on immediate tasks. Designs that work have just enough but not too much structure to channel the energy and keep things moving and productive. These structures are liberating rather than confining (Kimball, 2011).

By combining white space, engaging unusual suspects, and creating opportunities for the unexpected to emerge organizations can create an environment that actually fosters serendipity, inspiring fresh ideas, new directions, and innovation.

Conclusion

Using the simple-complicated-complex-chaos continuum in tandem with some of our familiar tools can give OD practitioners some new ways to think about change, communication, and culture in organizations. It can give us a more extensive vocabulary we can use to engage in dialogue that helps our clients thrive in zones of complexity and at the edge of chaos.

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CASE STUDY

A Call for Diversity at Palos Production

By Therese F. Yaeger and
Peter F. Sorensen

Mary just left a meeting with her CEO feeling overwhelmed. As the Director of OD for Palos Production, a successful manufacturing company, Mary feels incapable of delivering what Todd, the CEO, demands of her—an effective diversity and inclusion program.

At their meeting, Todd expressed his concern over current racial unrest and claimed, "The recent murders of George Floyd, Breonna Taylor, Trayvon Martin, and Ahmaud Arbery, among many others have created a heightened need to address the diversity issue in the U.S., and particularly the business world." He then explained that during a peaceful march in the area last month, that the Palos Production plant had external damage to the building with some broken windows.

Todd realized that because of the company's recent focus on the bottom-line financial portfolio, Palos Production neglected to address the lack of diversity at Palos. Todd explained to Mary that this is the moment to create an effective diversity program at Palos, and Mary is the perfect *change agent* to accomplish this effort. Todd then reiterated, "This D&I effort will be your new OD assignment, and there is no room for failure."

Mary is concerned. She has been the OD Director at Palos Production for five years, with successful OD projects on such efforts as employee engagement, the cultural integration with a recent merger, and organization design efforts with various departments' managers. But because of the sensitivity of the Diversity, Equity and Inclusion issues, Mary has always considered diversity and inclusion an expert's job, not something that she is comfortable undertaking. But when she mentioned to Todd that perhaps he should hire an external OD consultant to undertake the diversity initiative, Todd stated that he already tried, and that "every diversity consultant out there is already booked for the next year." In short, Mary must own and deliver this diversity effort.

As she left Todd's office, Mary visited the HR Department to get knowledge of any past diversity efforts at the plant. Kevin in HR explained that past efforts over six years ago, were more of a "one-day effort" with morning speakers and general discussions among employees. In essence, the intervention wasn't required, and the effort did not have any measures of success. Yet Kevin agreed with the CEO that a diverse workforce can actually boost innovation and creativity.

Mary has so many questions such as: Where should she begin this project? What is the timeline? Who should she include? What OD interventions would benefit this situation?

We have three OD colleagues to assist Mary on next steps for this critical project: Sharon, who brings past knowledge of a diversity effort, Tekiae a corporate D&I leader who applies OD techniques, and Marjorie, an OD consultant specializing in designing corporate D&I strategies.

Sharon Catania

Four Lessons Learned

Mary's hesitation is understandable, but there are several reasons why *she is exactly the right person* to lead the effort. She already has: (1) an executive-level champion in the CEO; (2) a history of success in leading changes within Palos Production; (3) an understanding of the company culture; (4) firsthand knowledge of the internal influencers; and (5) a genuine caring about the company and its employees. Also, Mary can leverage some cautionary notes from a past diversity effort at a large engineering and construction (E&C) company, which was less successful than anticipated. Here I can provide some personal reflection and lessons learned from a Diversity, Equity and Inclusion (DEI) effort.

In 2009, a self-managed talent team was assigned by the senior E&C executives to provide its top five recommendations for increasing diversity. The recommendations, all based on best practices culled from other organizations and promoted by external experts, were put into practice starting in 2010. Here are four lessons that can benefit Mary.

Best might not be best. Just as a transplanted organ can be rejected, some of the transplanted best practices were rejected. At E&C, some merely withered in size; some fully died away. A positive-based approach, such as Appreciative Inquiry, could have yielded a collection of extremely positive, internally-grown success stories. Those internal successes could have become the best practices that were then integrated more broadly across the company—an approach with far less risk of rejection. For Mary at Palos, a positive-based approach could also lessen the likelihood of contentious finger-pointing that could mire any DEI initiative in a cycle of negativity and resistance.

Difficult but necessary. DEI conversations can be difficult—particularly open and honest ones. The 2009 talent team at E&C often avoided or minimized such conversations. Any truly effective effort will need to be based on an accurate, foundational understanding that can arise only from frank discussions with an abundance of listening deeply as well as speaking

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candidly. At Palos, Mary will need to create a safe space for those necessary conversations, perhaps by leveraging aspects of Dialogic OD. Real progress will depend on members of Mary's team being able to appreciate the perspectives of others.

Jump in. Six months passed between the announcement of the 2009 initiative and the talent team's delivery of recommendations. A similar length of time then elapsed before employees began to see implementations getting underway—causing some skepticism about the sincerity of the initiative.

For Mary at Palos, the current state of unrest will not tolerate such slippage of time. Mary should jump in and get things moving. DEI is a highly complex issue best addressed with a series of adaptive moves. The open and honest conversations in combination with the collection of internal success stories can spark ideas for those moves. Agile methods can then be used to rapidly develop and launch pilot programs, to gain quick wins that will build momentum, or to spawn swift lessons that can lead to better options.

Success. At E&C, more than a decade after the 2009 initiative, there are varying viewpoints about the degree of its effectiveness (or failure)—depending on whom you ask. This one example highlights the need to define up front what success will ultimately look like—and, what the interim markers of progress will be. It is critical that members of Mary's team (both management and employees) collectively define success. Neither management nor employees can do that alone.

By leveraging lessons learned from the 2009 E&C initiative, Mary should be able to avoid some of the pitfalls of a DEI effort. Mary might be anxious about the responsibility, but she should also be eager to undertake this challenge. She has the opportunity to help bring about *truly meaningful* change!

Tekiae Warren

It's a Journey, Not a Race

Given the complexities of D&I, I recommend a highly tailored blend of Diagnostic OD and Dialogic OD techniques as the foundation for conceiving Palos' enterprise-level D&I program and its implementation to create a transformational change effort.

Serving as Palos' internal OD expert for five years, Mary should have in-depth knowledge of the culture, operations, power dynamics, level of change readiness, and overall organizational effectiveness gaps. Additionally, she likely has forged strong relationships with senior leadership and key stakeholders that she will need to leverage as she challenges the status quo, seeking allyship, and defining the D&I path forward. Todd is adamant that Palos needs more diversity, which is an excellent start in the right direction. A multi-pronged diversity recruitment plan could offer a viable approach. However, Mary must emphasize why diversity representation alone can't achieve the human performance AND bottom-line benefits of D&I that Todd seeks. An inclusive culture is the vanguard to extracting the best aspects of an employee's human capital and for their value to be operationalized. Diversity without skilled inclusion is ineffective, as the two are symbiotic. Mary must focus on how to leverage

a newly diverse workforce to propel performance outcomes, manage conflicts, mitigate turnover, and foster cohesion.

As a D&I leader, what I encounter is a call-for-action from organizational members seeking to see tangible, positive change that will improve their daily employee experiences by facilitating their need for belongingness, being valued for their uniqueness, and their quest for equitable inclusivity in decision-making processes, and opportunities for advancement. What sets any organization apart from others is not necessarily adherence or departure from this mix of activities; instead, it is the level of due diligence invested in gathering comprehensive data about an organization's D&I climate needs that is critical. This should be the first intervention. With well-meaning intentions, organizations can be eager to get started.

Dialogic OD

Facilitating generative, reflective dialogue, a Dialogic OD process will allow a broad spectrum of employees to participate in developing the D&I program. Mary's team can help mitigate resistance and uncover Palos' inclusive culture underbelly by creating the right conditions that foster psychologically safe containers of transparent dialogue and feedback mechanisms. Dialogic OD will be imperative throughout the change transformation in shifting mental models and reaching consensus in envisioning a future state. The goal should be to build a program that is systematically responsive and relevant to performance gaps, people dynamics, and operational synergies. Synergistically, there are circumstances when prescriptive methodologies are appropriate. As such, traditional diagnostic OD can be applied when seeking to translate possibilities derived from generative dialogic dialogue and data analytics into actionable strategies. It can also lend its suite of micro, meso, and macro interventions to facilitate D&I learning, training, coaching, and knowledge transfer.

Transformational Culture Change

Evident from research and personal experiences, I've found that inclusionary practices are not adopted at the same speed in organizations, nor is diversity perceived via the same paradigm of assumptions, motivations, and value propositions. Most transformational culture change takes at least two years. There will be incremental changes along the way, but Mary must sustain momentum by setting realistic expectations, being transparent about challenges that require crucial conversations, and celebrating successes. Their ability to psychologically and skillfully equip leadership and Palos' workforce with the mental models at each phase of the D&I journey is equally imperative. They must keep the organization engaged and focused on their future-state vision, reminding organizational members that this is a journey, not a race. Todd has given Mary a seat at the strategic table to demonstrate OD's value as a strategic partner to set a future-state D&I vision and change strategy embedded across the organizational system.

Structure Follows Strategy

Once a future-state D&I vision and supporting strategies have been established, Palos will need to determine what organizational design best supports their strategic objectives. The wrong organizational structures and the absence of an integrated suite of supporting policies and procedures will completely thwart even the most comprehensive D&I strategy. Also, infusing accountability mechanisms across all levels and tying them to performance reviews is critical.

Finally, OD practitioners need to possess D&I skillsets. From its inception, OD was intrinsically connected to D&I. Although not typically explicitly cited as one of OD's core humanistic values (perhaps we need to change that), in unison, OD's values implicitly speak to D&I's mission.

Marjorie Derven

Start with Assessment

Mary must take a deep breath and pivot out of panic mode. As an OD professional, she has many relevant skills in her repertoire that are highly relevant to this assignment. This realization will make her feel more confident.

As she is competent in OD, Mary can begin this assignment by ramping up her knowledge set quickly, perusing the internet, published books and articles to have a foundation of basic information about the current state of Diversity, Equity and Inclusion (DEI). This research reveals that overall, such initiatives have had very limited traction. Some of the factors that her research reveals are barriers to success that include:

1. Limited DEI budgets and staff
2. Lack of sponsorship at the top
3. Focus on isolated "programs" that tend to attract people that are already advocates
4. Inadequate linkage to pressing strategic imperatives, business problems, and opportunities
5. Scattershot efforts that lack specific targets
6. Limited accountability to change.

Of these factors, Mary recognizes she can do little at this stage to change the first barrier, limited budget and staff, as her boss Todd has made clear that she is operating under this constraint. However, the other barriers are ones that Mary has successfully tackled before with other OD assignments, and she plans to approach this challenge by setting a target early on where she is likely to achieve a visible short-term win. She will then leverage this approach to build greater organizational support and advocate for more resources.

With her view of organizations as ecosystems, Mary should deploy a holistic approach to this important initiative and incorporate the Galbraith STAR model of Strategy, Structure, Processes, Rewards and People as a starting framework.

Mary should plan to start with an organizational assessment that includes a broad sample of levels, functions, and tenure within Palos Production to obtain a picture of the current state of DEI, including the current level of understanding, hopes, and concerns and anticipated roadblocks. Using this foundational data, Mary will present this "as is" picture, combined with external third-party research about the benefits of DEI on talent engagement and retention, innovation, and financial results to a group

of senior-level leaders who may serve as sponsors as well as HR. Part of this effort will be a review with HR regarding lessons learned from the prior DEI efforts to be leveraged today. She should then schedule a follow-up briefing, capturing their questions, ideas, and concerns, with a preliminary DEI strategic plan, which will likely include the three key components of workplace, suppliers, and community.

Following an iterative process, Mary will enlist organizational support to identify immediate, short-term, and longer-term priorities to move the needle on DEI, with an intention to link to an existing organizational imperative that already has visibility and support. She must plan to build in a pre- and post-survey with actionable items and engage relevant stakeholders in the creation of the survey to ensure it is addressing the most important issues that address the members' commitment to change. Mary should also establish a governance structure and enlist others in the organization such as a DEI Council and Champions so that her efforts are multiplied and will have greater traction.

While balancing the dangers of trying to boil the ocean versus focusing on cosmetic changes, above all, Mary must be excited about this important challenge and opportunity to drive meaningful change at Palos.

Yaeger and Sorensen Respond

We applaud our respondents, Sharon, Marjorie and Tekiae, for providing three different perspectives to this case. This case which is both timely and real, explores a current concern from OD consultants who want to make a difference in the real world today; namely, the need for creating a more diverse, equitable, and inclusive work environment! In this case, Mary has a personal concern about her lack of experience in the Diversity arena, but as Tekiae pointed out that "OD was intrinsically connected to D&I." Respondents Sharon and Marjorie agree that Mary is the right person for this effort with her history of success at Palos Production.

But the differences of OD approaches from the respondents are worth exploring.

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Sharon Catania, MS, has worked in the IT field for several decades—most recently as Director of the Corporate IT Project Management Office for an international engineering and construction company. In addition to IT responsibilities, Sharon has often been called upon to provide the company with services generally considered as OD functions. Sharon holds a Bachelor of Science degree in Mathematics and Secondary Education from the University of Illinois at Urbana-Champaign, and a Master of Science degree in Management and Organizational Behavior from Benedictine University. Sharon can be reached at *Sharon.L.Catania@gmail.com*.

Tekiae Warren, MS, RODC, is the Global Recognition Lead, North America at Accenture, a global management consulting firm. Tekiae has held a variety of D&I, client services, corporate strategy, and change management leadership roles across multiple industries, including health care, consulting, and managed care. As a D&I leader, Tekiae led D&I for over 11k employees and developed D&I and people strategies from the ground floor. Also, a Ph.D. candidate at Benedictine University, her research involves a meta-synthesis of D&I models to inform theory development and practice. Tekiae can be reached at *tekiaew@gmail.com*.

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Sharon brings the lessons learned from a past DEI case that highlights the challenges of real DEI conversations, and defining what success looks like. Marjorie reminds us of the importance of starting with background research on DEI, and a good assessment to identify the "as is" at the plant.

Tekiae points out the importance of the need for belonging and being valued—a must! She suggests applying OD techniques of Dialogic OD, the use of mental models, and accountability mechanisms are all promising approaches.

The respondents also raise the element of time, with Tekiae claiming that transformational culture change takes at least two years! It is also noteworthy that each respondent presents the importance of the executive level buy-in. Finally for us, we appreciate that the respondents identify classic OD techniques for Mary to incorporate, such as Appreciative Inquiry, Dialogic OD, undertaking an initial assessment, Galbraith's Star Model, and pre- and post-survey data to assist the organizational members. Thanks to our respondents for such insightful OD perspectives!

*Practicing***OD**

Welcome to *Practicing OD*, a collection of short articles (900–1200 words) on useful ideas, lessons learned, and practical suggestions for managing the day-to-day challenges of doing OD. We welcome brief case studies; guidelines and tips for applying proven or cutting-edge methods, principles, processes, practices, interventions, and tools; and thought-provoking essays on practice-related challenges, questions that emerged from a client engagement, or new trends and technologies that will influence the practice of OD.

Submit Microsoft Word electronic copies only to:

Stacey Heath (*stacey279h@gmail.com*)

Deb Peters (*deb.peters@morganmcguireleadership.com*)

Rosalind Spigel (*Rosalind@Spigelconsulting.com)*

Include your name, phone number, and email address. If your article is accepted for publication, you will be notified via email. We look forward to hearing from you.

Submission Guidelines

» Articles should be practical and short *(900–1200 words; 3–4 pages single-spaced)*

  • Write in your own (first-person) voice using simple, direct, conversational language.

  • Focus on **what** you are discussing, **how** it works, or can be used, and **why** it works (what you believe or how theory supports it).

  • Use bulleted lists and short sections with subheads to make it easier to read.

  • Include everything in the text. No sidebars. No or very limited graphics.

  • Do not use footnotes or citations if at all possible. Citations, if essential, should be included in the text with a short list of references at the end of the article.

» Articles can be written from various perspectives, including but not limited to:

  • Brief case studies that highlight useful concepts, applied theories, lessons learned, and implications for future practice.

  • Guidelines and tips for applying proven or cutting-edge methods, principles, processes, practices, interventions, and tools.

  • Thought-provoking essays on practice-related challenges, questions that emerged from a client engagement, or new trends and technologies that will influence the practice of OD.

» *Practicing OD* considers articles with original content for publication.

  • Articles considered for publication may not have been previously published elsewhere (including online in any format).

  • Articles from returning authors will be considered after one year has elapsed since publication of the previous article.

» Include a short (25–50 word) author bio with your email so readers can contact you.

> "Commonly used for evaluating performance of individuals, 360-degree evaluation tools and techniques can reveal profound data for use in program strategy and leadership."

The Power of a 360-Degree Program Evaluation for a Nonprofit Organization

By Lori Wieters,
Kathy Wenzlau,
and Lindsay Perez

Overview

Program evaluations are an important measure of whether a nonprofit is effectively meeting the needs of their clients or members. In addition, many nonprofit operations rely on grant money to deploy programs. It is important for organizational leaders to conduct periodic evaluations to ensure the programs meet grant requirements and restrictions. Program evaluation is a valuable tool for organizational leaders to use when searching for information about program outcomes.

Program evaluations come in various shapes and sizes; some assess processes and others assess outcomes. Both types of evaluations help organization leaders and stakeholders understand the relationship of the return on investment to the benefactors along with the program's met and unmet needs. The most powerful evaluations include a full 360-degree program evaluation that include both processes and outcomes.

Commonly used for evaluating performance of individuals, 360-degree evaluation tools and techniques can reveal profound data for use in program strategy and leadership. This article details how gathering data internally and externally at multiple levels of the program and its environment have proven invaluable, providing short- and long-term benefits.

Typical evaluation questions include:

» How does the program align with our mission, vision, values, and the specific grant requirements for funding the program?
» How can we ensure our program delivers quality services to our clients?
» What is working and not working in the program?
» Do our programs have trouble spots or gaps to address?
» Do we have the right people doing the right work?
» What external research exists that impacts the program?
» Does our strategic plan demonstrate the current and future needs of the program?

360-Degree Program Evaluation

The most effective 360-degree program evaluation includes multiple assessments, surveys, interviews, and activities that provide data for the analysis, evaluation and subsequent recommendations customized to the specific needs of the clients.

Client program evaluations may include some or all of the following:

» Leader meetings to discuss past, present, and future of the program.
» Individual executive leader meetings.
» Program manager interviews and engagement throughout the process.
» Program staff interviews.
» Current and past client surveys and focus groups.
» Stakeholder surveys, which include internal leaders and staff and external customers, clients, and vendors.
» Current data collected about the programmatic requirements, similar to grant documents, policies, and guidelines.
» Research on the external environment, for example, competitor data, industry best practices, and related internet research.
» Quality and project management tools to analyze processes and outcomes.
» Financial management tools to analyze the return on investment related to the program.
» Strategic planning processes including SWOT/TOWS and gap analysis, to identify recommended strategic priorities and programmatic recommendations.

The following case study (*Figure 1*) provides an example of the cyclical nature of our 360-program evaluation process.

Case Study

A small nonprofit client recently engaged us in a first-time program evaluation for a 70-year-old program to ensure sound governance and future funding. Continued grant funding was uncertain because of changes in the bidding process and new guidelines.

Initial Client Meeting

In an initial meeting with the CEO and COO, we determined the program evaluation process and desired outcomes. The next step was a four-hour executive leadership discovery session, with the CEO, COO, CFO, and program manager, in which we explored the past, present, and future focus of the existing program. The purpose of this session was to build a common understanding of the program, align expectations for the program evaluation, and learn the leadership team's vision for the future of the program. The executive leadership discovery session yielded data that was used as the foundation for the program evaluation.

Data Collection

We then met separately with the program manager for her perspective on the program. She had been in the organization for 14 years and shared the program's history, including the transition from the original program manager to herself. She described herself as a highly collaborative leader, which contributed to a significant finding in the evaluation. The information collected from the program manager throughout the program evaluation added an invaluable perspective to the overall data collected.

After meeting with the program manager, interviews were conducted with program staff, using the same questions. Interview data was captured about the program and the program manager. The data was subsequently analyzed to identify themes to inform the final recommendations.

Through online and in-person surveys, the perspectives of past and present clients, stakeholders, partners, and community members were included. Some survey data validated assumptions of the program manager and organization leaders. Other new information highlighted a gap between the program's intent and the reality of the experience.

Additional data was collected in a focus group with past and present clients. The focus group members validated the information collected through the surveys and provided a personal perspective.

Data Analysis and Report Preparation

We compiled and analyzed the data using SWOT/TOWS strategic planning tools to narrow our findings into seven strategic priorities under four categories: change
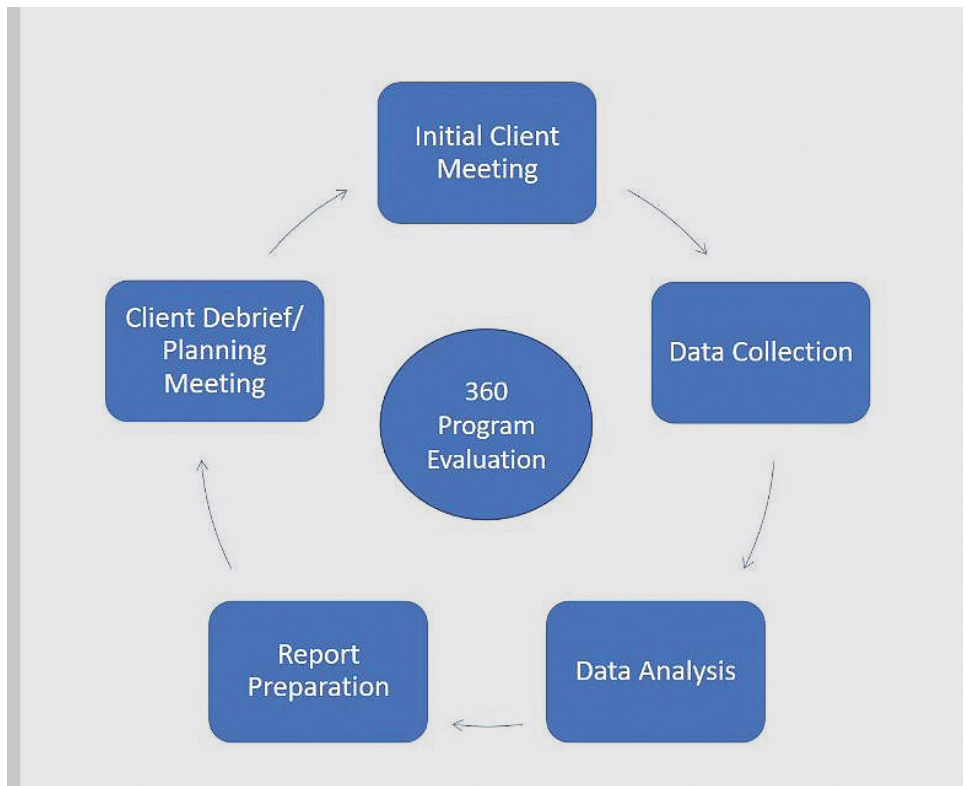

Figure 1. 360-Degree Program Evaluation Case Study

> *. . . a 360-degree program evaluation can be process based, design and efficiency focused, and goal centric, while using both summative and formative methods. Integrating all of the components of program evaluation in one initiative reveals outcomes that the client had never considered and expands the client's thinking about their program.*

strategies, defensive strategies, diversification strategies, and aggressive/innovative strategies. One strategic priority which resulted from the TOWS Matrix analysis, was to change the structure of the team to meet the current and future client demands. The strategic priority also included changes in programmatic guidelines including new client communication strategies, mobile locations, and a boundaryless servicing model. This one strategic priority provided a guide for internal changes to advance the organization's work towards its future goals.

Client Debrief/Planning Meeting

These strategic priorities and recommendations were presented in a debrief meeting with the CEO, COO, CFO, and program manager and documented in a 100-page report. The final part of the meeting was dedicated to validating and identifying three strategic priorities to focus on for the coming year, and a timeline for the remaining six. Through this process, we worked collaboratively with the client to determine the level of effort for which the client had capacity and expertise to complete the priorities, and the level of support they needed moving forward.

Conclusion

The thorough nature of this 360-degree program evaluation led to the creation of several programmatic strategic priorities and generated several years of focused activity for our client as they enhanced and evolved their program. We will continue to assist them through the initial deployment of the first three strategic priorities and then assess/reassess our involvement in the next phases of deployment.

Typical program evaluations can be process based, design and efficiency focused, or goal centric. A formative program evaluation is used to gather information that can be used to improve the implementation of a program. A summative program evaluation is conducted toward the end of a program and is intended to explore whether the program has met its intended outcomes, as well as calculate the ultimate value, merit, and worth of the program. In contrast, a 360-degree program evaluation can be process based, design and efficiency focused, *and* goal centric, while using *both* summative and formative methods. Integrating all of the components of program evaluation in one initiative reveals outcomes that the client had never considered and expands the client's thinking about their program. We hope that our experience will provide a road map for other consultants who want to conduct 360-degree program evaluations with their clients.

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> "Once key stakeholders experienced OD in *being*, they became more open to OD approaches, for example, co-creation versus expert advice, diagnosis-based solutions versus generic best practices, and patience with the pace of interventions versus quick fixes."

Infusing OD Values in Talent Development and Succession Planning

By Priya Vasudevan

I am an HR leader and OD practitioner, currently working as head of India HR in a Fortune 100 global organization. I have often struggled with bringing OD concepts and processes into organizations. In my current organization, as I was onboarded, I noticed several areas that called for an OD approach. My suggestions to bring in OD, however, were met with skepticism. I found that embodying OD values in addition to using theories, frameworks, and orientation, eventually brought about greater acceptance of OD in practice. Once key stakeholders experienced OD in *being*, they became more open to OD approaches, for example, co-creation versus expert advice, diagnosis-based solutions versus generic best practices, and patience with the pace of interventions versus quick fixes.

Captured below is a case of infusing OD values and principles into talent development for succession planning and achieving clear positive outcomes over a two-year cycle. This success paved the way for an OD approach to be utilized more intentionally in the organization.

Dilemmas in Talent Development and Succession Planning

Having had the good fortune to work with some leading organizations, I have often wondered about the pragmatism of succession planning and validity of talent development for successor roles. Some of the dilemmas I have noticed are:

» How to keep the process dynamic? In a VUCA environment, by the time the talent assessment and development or succession planning processes were completed, the talent landscape had shifted—rendering the plans less relevant.

» How do organizations sustain employee energy and engagement in the process of talent development? Those identified as top talent received significant investment of development dollars and yet they did not remain focussed on a long-term development journey.

» How can the responsibility of development be shared by all stakeholders? As HR teams run the talent development and succession planning, line

managers of top talent often become less involved in actively supporting them on their development journey.

Infusing OD Values and Competencies

Begin where the client is. This young and growing organization was in a very competitive talent market and experienced significant attrition yet there was no formal program to develop talent for succession or career movement. Promotions were highly sought after by employees. Candidates were many and the promotions slots few. Promotion decisions were made by senior management after review of managers'

A need was felt for a fair and scientific process to make promotion decisions. Out of the several options for an assessment tool, the Development Centre (DC) was selected to evaluate the potential of candidates. By acknowledging the organization's current state and employees' dissatisfaction, we were able to introduce a new process for evaluation and promotion.

recommendation for each candidate. These promotion decisions would result in disengagement and even attrition of high performing talent who were not promoted. A need was felt for a fair and scientific process to make promotion decisions. Out of the several options for an assessment tool, the Development Centre (DC) was selected to evaluate the potential of candidates. By acknowledging the organization's current state and employees' dissatisfaction, we were able to introduce a new process for evaluation and promotion.

Create a psychological safe space. DC involves evaluation and employees often equate being evaluated with being judged. To prepare the employees, we held orientation sessions to familiarize the participants with the DC process, framework of assessment, and the neutrality of the assessors. Excitement and energy rose when they realized that this was an objective approach. The CEO's assurance on how he benefited

from a similar process earlier in his career supported the DC's acceptance. The objectivity of the DC approach combined with a thoughtful introduction created a sense of safety and even anticipation.

Practice an authentic yet non-reactive presence. DC reports and outcomes created a stir. Despite all the preparation, some participants reacted adversely to the DC report as it contradicted their views of themselves. The OD value of presence made it possible for me to understand my own emotional hot buttons and remain emotionally detached while staying authentically engaged with members of the group.

Mirror the diagnosis and enable informed choice. The DC findings were shared directly with top management for decision making on promotions without review by managers. Top management deliberated on whether to believe or disbelieve findings. Interestingly despite differences, after reviewing the competency scores and discussing recommendations, the group came to a consensus to go with the findings. They dropped their biases about candidates in the face of evidence. Decisions for promotions and successors were made in an informed manner.

Facilitate Appreciative Inquiry-based curiosity. Each participant then undertook an Individual Development Planning (IDP) process based on a three-way conversation between the employee, the manager, and the HR representative. The HR representative facilitated the conversation eliciting strengths and dreams (career aspirations) of the employee through a

generative dialogue, buoyant with positive energies. The IDP was made on a 1-year planning horizon with elements of education, experience, and exposure in balanced measure.

Shape the ecosystem to sustain the process. Development plans, created with best of intentions, tended to lose momentum in the face of competing priorities. To sustain the focus on development, a quarterly catchup conversation was instituted between the employee, manager and HR representative. Progress was applauded and lags examined. This was also an opportunity for the stakeholders to renew their commitment to the IDP. The onus of development shifted firmly to the employee with the manager supporting their progress, and the HR representative facilitating the conversations.

Engage social narrative to support the practice. Participants of the DC process were collectively termed Key Talent Pool. They received monthly updates on the progress of their collective development journeys, and curated articles on leadership topics. This induced a sense of shared progress and pride. A formal document, Career Advancement Guidelines, that captured the promotion and development process was published on the employee portal. New joiners went through the Career Advancement Guidelines as part of their onboarding, which contributed to the social narrative.

Leverage change advocates and leadership evangelists. In the subsequent talent cycle, some key talent who were managers had their team members experience DC and resultant development journeys. The key talent enthusiastically stepped into the conversation as managers, modelling their own three-way conversations. Members of senior management who had initial inhibitions about DC, witnessed their own team members developing and actively participated in their development journeys. In talent cycles and orientation sessions for new participants, they became leadership evangelists.

Enhance the system's capacity to deal with change. As the organization contemplated institutionalising work from home (WFH) as a result of COVID-19, it adopted a collaborative approach by constituting a task force (many of them members of key talent pool) to make key decisions. Facilitated by an OD practitioner, the task force gathered data from various employee groups, analysed common themes, addressed concerns and arrived at WFH guidelines and governance that were widely accepted within the organization.

Conclusion

As this case demonstrates, talent development and succession planning improved in process and outcomes when OD values and models were applied. When the OD practitioner's enthusiasm to implement OD concepts was met with discomfort in the client system, an organic way of benefiting the system was by embodying OD values and competencies as a 'way of being' first and then in a 'manner of doing.'

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> "Whether mentors or mentees, clients or consultants, job prospects or hiring leads, thought partners, or simply friends, these new connections have started to alter the landscape of OD and adjacent fields by helping people find work and like-minded practitioners with whom to join forces."

The OD Salon

Building a Dialogic Container to Advance the Field through Social Connection

By Julian Chender

Modeled after the French salons of Enlightenment Europe and coupled with the modern post-work happy hour, the OD Salon is a hosted gathering of OD and OD-adjacent practitioners where new people, new ideas, and new possibilities come together through conversation. The OD Salon grew out of a desire to foster community and connection in and around the field of OD. Since its inception in February 2019 as a happy hour in New York City, the OD Salon has grown into a dialogic container that convenes people from OD and adjoining fields to create innovation and move OD practice forward.

According to Chris Corrigan (2015), dialogic containers are "intangible yet real spaces in which the potential and possibility of a group can unfold" (p. 291). Dialogic containers have a purpose and a scope of work. For the OD Salon, the purpose is to foster emergent, generative dialogue among participants, while the intended scope of work is to shape collective meaning and create networks of people who move the field forward.

Background and Form

The inspiration for the OD Salon came from the monthly happy hours Melissa George Kessler and Jacques Domenge have hosted for OD practitioners and students in Washington, DC, for several years. Upon moving back to New York from DC, I longed for the community, shared sensemaking, and deep learning that those informal gatherings provided. There were plenty of opportunities for formal learning in and around OD in New York City, but they failed to satisfy the need for connection and shared discovery.

The OD Salon, therefore, grew out of my desire to build an informal gathering where emergent and free-flowing conversation would lead to greater connection, and create an atmosphere fostering innovation to advance the field.

The OD Salon started with an invitation to ten people for happy hour in the Financial District. People appreciated the opportunity to socialize with like-minded professionals and hear about their work. As word spread, the mailing list and participation grew. Attendees told their professional and educational communities about the events and I invited interesting people I found on LinkedIn. The monthly Tuesday-night gatherings were increasingly popular, attracting up to 35 people. To keep the informality of the container, participants were not required to register

or RSVP. Anyone with an interest in OD could come, and participants were encouraged to bring others.

The Impact

At the OD Salon, people found new friends, new clients, and new job opportunities. To find out what made the OD Salon special, I asked 300 people on the mailing list what drew them to the Salon and what they got out of it. The results showed that the Salon's community feeling nurtured informal learning and networking opportunities. In terms of community feeling, one participant wrote, "I think what distinguishes the OD Salon from other groups is its informality (in the best way!) and sense of community." Another attendee shared that she liked "the fact that it is casual and cozy, which makes it easy to open up and chat candidly."

OD Salon participants praised the informal learning, "the diversity of thought," and the "incredible insight on thought leadership in the field(s)." One attendee noted, "the OD Salon provides a safe space where I can comfortably learn from other professionals' experiences in the field," while another said, "the OD Salon conversations are mental gobstoppers—fascinating ideas to mull over."

Finally, the majority of respondents said making new connections in a safe, open, and generative environment was a great gift. Whether mentors or mentees, clients or consultants, job prospects or hiring leads, thought partners, or simply friends, these new connections have started to alter the landscape of OD and adjacent fields by helping people find work and like-minded practitioners with whom to join forces.

Tips for Hosting

Hosting an OD Salon in your area is a great way to build community and advance the field. While hosting requires deliberate intention and attention, it is a rewarding experience. There are four practices that Corrigan (2015) outlines for hosting dialogic containers:

1. First, the host must be present. Hosting requires focused energy and the ability to be both fully present to individuals during small group conversations and to the group as a whole.
2. Second, the host must participate in the dialogue. Hosts act "in" rather than "on" containers. One way for the host of the OD Salon to participate is through the role of pollinator. As the informal conversations take place among small groups, the host flies around bringing ideas from one small group to another.
3. It is also important that the host focus on making relevant introductions among participants. The host builds these nodes of connection between others to create generative conversations. This is Corrigan's third practice, hosting space for contribution. The OD Salon looks to advance the field. Therefore, the host must look to include contributions from the edges of the group, as innovation occurs at the margins. That dynamic is the reason the OD Salon seeks both OD and OD-adjacent practitioners.
4. Finally, the host must co-create the container with the participants. This means putting intention forward while being open to any outcome. One never knows what will occur at an OD Salon. The hope is that people make meaningful connections to move the field forward. However, it is up to the participants to determine what happens.

Hosting Online

The OD Salon has pivoted to an online platform as a result of COVID-19. The energy is still there: people are hungry to meet each other, share experiences, and expand their connections across fields. Instead of people organically forming different conversation pods, the host creates Zoom breakout rooms with 3–4 people. The host rotates groups every 8 minutes which gives people enough time to expand their networks and meet new people while keeping the energy moving. We have also introduced prompts to get the groups started in an effort to accommodate

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the need for more structure in online gatherings, such as:

» What initially attracted you to your field?
» What are you passionate about in and around OD right now?
» What contribution would you like to make to your field?
» If you could learn one thing in and around OD, what would it be?

Conclusion

As the salons of Europe were integral to the process of Enlightenment, the OD Salon fosters community and intellectual connection to advance the theory and practice of OD through informal convening, providing the container in which people can share ideas and make unique connections.

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