

The Practice of Organization Development

The Handbook of Organization Development

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As a field of applied practice and research focus, organization development (OD) has a mercurial history, marked at times by growth, criticism, acceptance, resistance, and adaptation. Early in its life cycle, individuals and small groups were the targets of change, and it became known for its missionary zeal concerning values derived from humanistic psychology and democratic principles. However, when organization leaders faced significant environmental and performance challenges, they often viewed OD's individual focus as irrelevant. Some OD practitioners adapted their methods to deal with these broader strategic and design issues. Their efforts helped to develop a broader platform for improving organization effectiveness and a new breed of practitioner combining the behavioral sciences with management and organization theory. Others continued to concentrate on work with individuals and groups. Debates over the right and proper focus for the field ensued. With little agreement and solidarity in the field, anyone and anything could be called OD, adding to a less than stellar reputation in some client systems.

A variety of debates continue unabated. Some of them are the same (e.g., "What is OD?"). Other debates, such as who is an OD practitioner, is credentialing important, and is OD a profession, have emerged. There is general agreement, however, that it is time for the debates to come to a productive end (Bradford and Burke, 2005). Impetus for this view comes from the increase in OD educational options, student applications, and jobs with OD in their descriptions. Many people and organizations still clearly want something from OD.

Timeliness, therefore, justifies a chapter on the practice of OD and the development of practitioners. This chapter begins with a discussion of the roots and evolution of OD practice. It then explores the dominant debates in the field and suggests resolutions. In the third section, we present an original "theory" of OD practice. It overviews what good practice entails and helps to differentiate what makes OD practice different from some other change approaches. The final section provides recommendations for how OD educators can more effectively develop future practitioners.

The Roots and Evolution of OD Practice

The practice of organization development is more than 50 years old. Prior to World War II, organizations typically operated on principles of mechanistic and bureaucratic systems, including authority-obedience, division of labor, hierarchical supervision, formalized procedures and rules, and impersonality (and many still do!). Following the war, increasing interest in social change, attitudes about democracy, and self-actualization brought distinctly different values that were a counter-force to the extant organizational values-in-use. OD grew in popularity by offering a more holistic view of people and organizations, with an emphasis on humanistic and democratic values, and the belief that this different perspective was *not only better for people, but also for organization performance*. French and Bell's (1998) history of OD stated, "We think most organization development practitioners held

these humanistic and democratic values with their implications for different and *better* ways to run organizations and deal with people.” [italics added]

Behavioral science and management research findings influenced the earliest values, philosophy, and methods of practice. For example, the action research methodology (as created by Lewin (1948)) tried to solve real-world problems by applying group process knowledge to contemporary issues. Initial OD change methodologies were clearly connected with:

- early leadership work that brought legitimacy to participative and democratic methods (Lewin and Lippitt, 1938; Follett, 1941; Likert, 1961; Tannenbaum and Schmidt, 1973)
- early human relations work that highlighted the primacy of social factors, attitudes, and feelings in organization behavior, influencing productivity and morale (Roethlisberger and Dickson, 1939; Mayo, 1945; Homans, 1950)
- early work on group dynamics and laboratory training bringing attention to group behavior, interpersonal relations, and self-awareness (Cartwright and Zander, 1954; Bennis and Shepard, 1956; Bradford, Gibb, and Benne, 1964; Schein and Bennis, 1965)
- changing views of the person, motivation, and interpersonal communication (Maslow, 1954; McGregor, 1960; Rogers, 1961; Argyris, 1965;)
- early use of data and diagnosis to guide change including survey research methods and action research (Mann, 1957; Whyte and Hamilton, 1964; Nadler, 1977; Bowers and Franklin, 1972)
- early work on environments, structures, systems and socio-technical principles helping to bring design and process into the picture (Trist and Bamforth, 1951; Burns and Stalker, 1961; Lawrence and Lorsch, 1967; Katz and Kahn, 1966)

Thus, as a social and organization change practice, OD has always been closely associated with the behavioral sciences, which added greatly to our understanding of organizations, human behavior, and change. Moreover, OD brought to the management of organizations a clearer focus on how *values* operated in managing, intervening, and changing organizations. The use of data to guide decisions; involvement, and participation of people in decisions that affected them; more effective conflict management; use of teams and team building; and the importance of climate and culture increased across organizations during the first 30 years of OD (Kleiner, 1996).

However, OD did not evolve as quickly, or in the direction, as many would have hoped. While mainstream management thinking was integrating the influence of complex, faster changing environments, performance concerns, and economic issues, the “love, trust, and truth” model remained the central strategy for many in OD. These traditionalists continued to focus on individual and group level problems as the means to change organization level performance.

Others, however, responded to calls for OD to adapt its methods and tools to organizational-level challenges. They argued that for a more comprehensive approach to organization improvement and change to emerge, OD needed to balance the value of an improved human system orientation with the economic, strategic, structural, and power realities. The

integration of strategy and organization design with behavioral science has been the most important evolution in the practice of OD, and has broadened the playing field and the impact (Cummings and Worley, 2005).

Recent trends in the field reflect the continued response to organizational conditions, the complexities of change and the broadening of practice. They include working with larger and larger groups, focusing on strengths and appreciative orientations, using natural sciences to better understand organizations and behavior, integrating principles of organization design with organization change, and deepening human connection and relationship. For example:

- Bunker and Alban (1997, 2005) and Holman and Devane (1999) have chronicled the trend of involving larger and larger numbers of stakeholders in the OD process, including such interventions as future search (Weisbord, 1987) and open space (Owen, 1992).
- Cooperrider and his colleagues (Cooperrider and Srivastva, 1987; Magruder-Watkins and Mohr, 2001; Cooperrider, Sorenson, Yeager, and Whitney, 2001; Ludema, Whitney, Mohr, and Griffin, 2003) have developed methods of practice using appreciative philosophy which has spawned a further stream of research into positive scholarship (Cameron, Dutton and Quinn, 2003).
- Wheatley (2001) and Stacey (2001) have begun the important work of translating concepts from the complexity and natural sciences into practical change techniques.
- Mohrman, Galbraith, and their colleagues have been integrating the principles of organization design with organization change (Mohrman and Cummings, 1989; Galbraith, 2001; Lawler and Worley, 2006).
- There has also been a renewed emphasis on deepening relationships and connection through creating real dialogue for understanding and influence, and structuring critical conversations as tools for change (Ellinor and Gerard, 1998; Brown and Issacs, 2005; Block, 2003).

Some of today's trends may pass, as others have. But some will become integrated into our theory, education, and practice and become part of the evolving field of OD.

Perpetual Debates in OD Practice

Bradford and Burke (2004, 2005) and Worley and Feyerherm (2003) outline a set of critical debates related to the practice of OD. These debates often splintered the field, but also attracted talent and stimulated its development. We may never fully understand which effects are more prominent, but their continuation appears distracting when the field needs centering, relevance, and advocacy. Understanding the debates also helps to understand the evolution of OD practice and some of the choices that people make to shape their practice. These debates include:

- 1) Definition of OD
- 2) Conceptualizations of OD
- 3) Credentialing of OD Practitioners

4) Effectiveness of OD Practice

While it may be valuable for the field to always continue some debate in the spirit of continuous improvement, it's important for individual practitioners, those that train them, and the field itself to draw some conclusions and decide where they stand. Growing their practice, mentoring others, and developing the field require clear perspectives on these issues.

Definition of OD (“What is OD?”)

The first, and perhaps most interesting debate, has been around the definition of OD. In fact, some argue that the term itself is inaccurate. Asserting that the practice is oriented around the behavioral sciences, Tannenbaum and others have argued that the field should be called “human systems development” (Tannenbaum, et.al.,1985). Our preference is to stick with the current term. We recognize that any organization will invariably involve people interacting across numerous levels of analysis (from individual to inter-organizational).

Surprisingly, and despite a number of well-accepted definitions from founders, acknowledged gurus, and academics, there seems to be a never-ending stream of complaints that the field is not defined. Worse yet, there are a wide variety of definitions across firms. While some firms have sophisticated OD capabilities and policies, other firms define OD as “communication.” Table 1 provides a sampling of formal definitions.

Table 1
Definitions of OD

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- OD is a planned process of change in an organization’s culture through the utilization of behavioral science technology, research, and theory (Burke, 1982)
 - OD refers to a long-range effort to improve an organization’s problem-solving capabilities and its ability to cope with changes in its external environment with the help of external or internal behavioral-scientist consultants, or change agents, as they are sometimes called (French, 1969)
 - OD is an effort (1) planned, (2) organization-wide, and (3) managed from the top, to (4) increase organization effectiveness and health through (5) planned interventions in the organization’s “processes,” using behavioral science knowledge (Beckhard, 1969)
 - OD a system-wide process of data collection, diagnosis, action planning, intervention, and evaluation aimed at: (1) enhancing congruence between organizational structure, process, strategy, people, and culture; (2) developing new and creative organizational solutions; and (3) developing the organization’s self-renewing capacity. It occurs through collaboration of organizational members working with a change agent using behavioral science theory, research, and technology (Beer, 1980)
 - OD is the attempt to influence the members of an organization to expand their candidness with each other about their views of the organization and their experience in it, and to take greater responsibility for their own actions as organization members. The assumption behind OD is that when people pursue both of these objectives

simultaneously, they are likely to discover new ways of working together that they experience as more effective for achieving their own and their shared (organizational) goals. And that when this does not happen, such activity helps them to understand why and to make meaningful choices about what to do in light of this understanding (Neilsen, 1984)

- OD is a system-wide application and transfer of behavioral science knowledge to the planned development, improvement, and reinforcement of the strategies, structures, and processes that lead to organization effectiveness (Cummings and Worley, 2005)

From a practice perspective, the commonalities among the definitions provide good guidance about OD's essence. For example, most or all of the definitions describe OD as

- a *planned process intended to bring about change*
- through the use of various *interventions*
- using *behavioral science knowledge* (theory, research, technology)
- having an *organization or system-wide focus*
- typically involving a *third-party change agent*

However, the differences in the definitions are important because they can lead to confusion over the *purpose of intervening*. For example, the definitions vary on the intended outcomes of OD. At the broadest level, they differ on whether interventions increase the organization's capability for change or problem solving; increase the system's effectiveness; or both. There is also little agreement within these broad categories. Within the effectiveness category, for example, the outcomes include changes in culture, performance, candidness, alignment, and health.

Finally, the breadth of potential of change targets may be the most important difference. They can range from a generic label of organization processes to more specific targets such as organization culture or the congruence among structure, strategy, processes, people, and culture. As Greiner and Cummings (2004) summarize, OD has evolved by expanding change targets and adapting to new internal and external strategic issues of organizations; and "the enormous growth of new approaches and techniques has blurred the boundaries of the field and made it increasingly difficult to describe."

These definitions also help to distinguish OD from change management, and to highlight the important issue of values in OD definition and practice. For example, OD and change management both address the effective implementation of planned change. They are concerned with the sequence of activities, processes, and leadership issues that produce organization improvements. Both have developed useful concepts and methods for helping organizations to deal with changing environments, competitor initiatives, technological innovation, globalization, or restructuring.

They differ, however, in their underlying value orientations. It is not that OD is unique because it is value driven. All professions and occupations have value bases. What distinguishes OD from change management is its choice of values and the way it enacts those values in practice. Its

concern with the transfer of knowledge and skill such that the system is able to manage differently and more able to manage change in the future are part of those values. In addition, OD values the whole person, their development and potential; the well-being of multiple stakeholders; the participation of people in decisions and actions that effect their quality of life; the concepts of free choice and responsibility; the authenticity, openness, integrity, and fairness of interaction; treating differences with respect, dignity, and inclusion; and collaboration and community (Jamieson and Gellerman, 2006). These values help to determine the appropriateness of particular planned changes (ends) and methods for getting there (means). Change management, on the other hand, focuses more narrowly on values of cost, quality, and schedule (Marshak, 1996; Warren, Ruddle, and Moore, 1999; Davis, 2001). It is more closely aligned with project management than OD. In short, all OD involves change management, but change management may not involve OD.

Based on these definitions and distinctions, and in discussions with OD practitioners, Worley and Feyerherm (2003) suggested that for a set of activities to be called OD, they should meet the following criteria. First, OD involves change. There must be evidence that individuals, groups, or organizations have changed (or are in the process of changing). Unless one is willing to adopt a very constrained view of change, a diagnosis of a system would not constitute an OD process per se. Second, OD involves learning and development. One of the enduring values in the field is that the behavioral sciences can help to build the system's capacity to change in the future. In short, the system and the people in it had to learn; they had to develop an increased capability to change. Finally, OD is not about change for change's sake. Its intent has always been to improve the effectiveness of a system. Such a set of criteria provides practical guidance for defining OD.

In consideration of the above analysis, we define OD as *a process of planned intervention(s) utilizing behavioral science principles to change a system and improve its effectiveness, conducted in accordance with values of choice, participation, human dignity* and learning so that the organization and its members develop.*

The definition one uses, especially its breadth, has significant implications for practice. First, it highlights what a practitioner must be able to understand and do. Second, it focuses attention on different targets of change. Third, it provides a basis for determining desired outcomes and measures of effectiveness.

Conceptualizations of OD

Is OD a “discipline,” “field,” “community” or “profession?” Practitioners, researchers, professors, and associations use these labels to describe OD. The labels clearly overlap but each connotes a slightly different way of describing the work and a different way of thinking about the people who affiliate with OD. Each label also suggests different implications for the kind of education and experience that OD practitioners *should* have and how they *should* do the work.

* We use “*human dignity*” here to represent the value thread, derived from humanism, of the concern for the worth, respect, interests, needs, and welfare of humans, their capacities and potential.

Our review recognized a convenient nesting of the terms that might help clear up some of the ambiguity. The root concept is discipline - a field of study or branch of knowledge, instruction, or learning. Disciplines have a body of knowledge and a set of values. While some argue that there is no consensual agreement on the body of knowledge and values (e.g., Church, 2001) that make up OD, the definition does not require that. Moreover, there is significantly more overlap than disagreement on textbook content, course syllabi, and other indicators of a body of knowledge (Cummings and Worley, 2005; French and Bell, 1998) and on values (Worley and Feyerherm, 2003; Egan and Gellerman, 2005; Jamieson and Gellerman, 2006).

- A “field” is a “topic, subject, or area of academic interest or specialization; a profession, employment, or business” (dictionary.com, 2006). According to that definition, if OD is a field then it is also a profession. In fact, field and profession are synonyms. Burke (1982) and Beckhard (1997) supported the view of OD as a field of study or a field of practice. Similarly, a “community of practice” is an informal network with a common sense of purpose, shared values, and a desire to share work-related knowledge and experience. OD has long operated as a tightly knit group of people sharing experiences, knowledge, and language; using common methods; adhering to similar norms and values; and helping the development of others.

There are varying definitions of profession that differ on a couple of items including whether it is an, “calling” or “directly influences human well being.” But they agree that it is an occupation or practice and that it involves academic preparation. Certainly, OD has been a “calling” for many as they have been attracted to the value base, and it’s concern for human welfare in pursuit of organization performance has long been a distinguishing factor.

A profession involves the application of specialized knowledge gained through education and experience. The importance of the academic preparation *before* OD practice has been gaining ground, but has never been a requirement or universally accepted. However, there are thousands of people hired into jobs in organizations with OD in the position description and just as many who operate as external consultants using the OD label. So, it is a recognized *occupation* for many people.

Cole (2005), Weidner and Kulick (1999), and Church (2001) have all argued that OD should be a profession but generally believe that it is not. They argue that the label “profession” generally connotes images of doctors, teachers, lawyers, and clinical psychologists who complete a lengthy education process, are often required to pass “proficiency” exams (certification) to practice, and have agreed upon quality standards and ethics with effective governing mechanisms. Thus, many suggest that important characteristics of a profession, not actually found in the definition of the term, are a credentialing mechanism that qualifies one to practice, continuing education requirements, and governance mechanisms that regulate entry, exit, and ethics violations. The OD field today seems far from having the capacity to implement such an infrastructure.

Before we turn to a discussion of the very practical issues associated with credentialing, we close this discussion of conceptualizations of OD by noting that most of these terms have little real affect on the practice of OD. However, certification or regulation would affect practice if professionalization required it. Otherwise, whether OD is a discipline, industry, community of practice, or field has little relevance. In as much as continuing to use different terms to mean the same thing only contributes to internal and external confusion, we support the adoption and use of the following terms: *OD is a “field of practice” from the perspective of education and a “community of practice” when describing the practitioners, researchers, and professors who affiliate with OD.*

Credentialing of OD Practitioners

The thorniest aspect of OD’s conceptualization is whether professionalization necessarily implies regulation and certification. For some, the debate over professionalization focuses on the implications of *certification* (either for proficiency or knowledge), *regulation* (as in governance and enforcement mechanisms), *standards of quality in education and practice* (similar to certification discussions) and *codes of conduct or ethics* (which seems to be one of the enforcement functions of professional governance). The “profession” concept seems to entail setting the standards, certifying that one meets the requirements, enforcing or renewing standards (decertification or periodic recertification), and establishing and enforcing codes of ethics (managing behavior to retain the integrity of the profession). In short, some argue that a profession establishes itself and maintains itself from within.

OD is likely to face continued disagreement over the implications of professionalization. Championed by some OD professional associations and several change management practices at large consulting firms, certification is partly driven in response to a growing number of people marketing themselves as OD practitioners without any formal training or education in the field, as well as a lack of consistency in applying OD’s core theories, skills, and interventions. “Bad” OD can be damaging to people, organizations, and OD’s reputation. To make matters worse, distinguishing between qualified and unqualified OD practitioners can be a difficult challenge for organizations. Professionalization of the field could help to remedy those problems and improve quality. By creating a common body of knowledge and defining minimum levels of skills, certification can ensure that OD practitioners have an acceptable level of competence to practice. It has the added benefit of helping the client know that the practitioner is credible. Experience-based professions have developed a variety of methods (e.g., exams and supervised practice) for doing front-end certification. Professionalization and certification would thus create boundaries between who is (and is not) an OD professional, and what is (and is not) OD practice.

However, the experience of other professions does not support the quality argument. Despite heavy regulation and certification of engineering, medicine, architecture, teaching, and other fields, there are bad engineers, lousy doctors, inept architects, and ineffective teachers. Moreover, since certification requires a set of consensual ethics, values, and standards, the inability of the field to converge on these issues (despite considerable overlap in the lists) makes regulation and certification all the more problematic. Finally, without a central,

acknowledged professional association, there is no judge and jury. Unless a groundswell of support for a common set of standards emerges, different groups will continue to quarrel over judgments about qualifications. Prior attempts to professionalize the field or to accredit practitioners, including the OD Institute's registration process (RODP, RODC) and an early attempt by NTL and Herb Shepard's certification program (IAASS), have had limited success. They provide ample evidence of the difficulty of resolving such differences. That may not be so bad, however, as it may allow for more innovation and less involvement of governmental/political bodies.

In essence, professionalization attempts to control the supply side of the OD profession. One alternative that we support is to educate the demand side and include education as an informal proxy for certification. First, organizations, managers, and other potential clients should be made fully aware of what OD is, how it works, and what it can contribute to their organization. We think educating clients and potential clients of OD practitioners is a more manageable strategy. It would allow the field to focus on the considerable agreement that exists in a number of areas. Professional association websites, advertising, and other marketing efforts could easily spread the word. Why do professional organizations exist if not to provide a mechanism for promoting its membership and the field of practice? Second, as discussed below, agreeing on a set of core issues in OD education would also provide some minimal assurance that an OD practitioner had the requisite knowledge and skill to conduct an effective OD process. In fact, there is now considerable similarity in OD textbooks used, curricula, and adoption of basic competencies by OD education programs. Finally, a theory of practice, as outlined below, can clarify and differentiate the methods and help to provide stronger criteria to assure that practitioners are carrying out effective OD processes.

Without credentialing or an acceptable proxy, the field will struggle with the unqualified, mismatched, and charlatan. Quality education programs for practitioners and clients, strong professional associations, more visibly shared values and ethics, a better theory of practice, and better evaluation research will all improve practice and help to establish greater relevance for OD.

The Effectiveness of OD Practice

Yuchtman and Seashore (1969) noted multiple, legitimate definitions of organization effectiveness. The same certainly can be said of the views of OD's effectiveness. At a minimum, one could evaluate whether an OD process produced: (1) improved organization performance (using accepted industry metrics); (2) improved individual and organization capability to manage and change in the future; (3) an organization that operated more in line with OD values (a different culture) or (4) acceptable return on investment (ROI). While beyond the scope of this chapter to conduct a full review of the debate over OD's effectiveness, we can summarize the critical and supportive views.

Critics of OD's effectiveness point to several important deficiencies in the literature. First, with respect to one of the espoused values and purposes of OD, there are no studies we are aware of monitoring the transfer of OD-related skills and knowledge to a client during an OD process. This statement does not refer to the large body of work evaluating training and

leadership development. These educational interventions clearly increase the knowledge and skill of client systems with respect to change competence. In general, however, these interventions are not OD per se and there is no evidence that the way they were conducted led to increased change competence in the organization. So the question remains, does OD actually develop an organization or its members in the developmental sense implied by the term? Although the number of studies demonstrating organization learning is increasing, we still do not know whether an organization actually learns to change better in the future because of an OD process. This is a curious omission.

Second, critics of OD's effectiveness point to the difficulty of associating change with performance improvement, whether performance measures productivity, satisfaction, results, efficiency, or other measures of effectiveness. In particular, a variety of messy research methods questions exist (Seashore, Lawler, Mirvis, and Cammann, 1983; Macy and Mirvis, 1982; Bullock and Svyantek, 1987; Golembiewski and Munzenrider, 1976; Terborg, Howard and Maxwell, 1982; Thompson and Hunt, 1996). Does the research gather longitudinal data (supposedly required for a prima facie evidence of change)? Can the research isolate the impact of the OD process from other influences, such as changes in technology, changes in strategy or structure, or other content-oriented aspects? Most of these issues can be grouped under the dilemmas associated with field research and quasi-experimental methods. In addition, few studies actually assess the ROI of OD.

On the other hand, there is a strong argument that OD has had a tremendous impact on organization practice. Qualitatively, OD interventions, such as survey feedback, team building, conflict management, socio-technical systems design, culture change, coaching, diversity, large-group conferences, employee involvement, self managed work teams, and open systems planning are common, routine, and institutionalized in many organizations. Kleiner's (1996) account of the influence and diffusion of OD practices is a compelling read.

In addition, the number of OD and OD-related jobs is growing both in the U.S. and internationally. Many organizations recognize OD's value add and often attach these positions structurally to senior line managers. There is also a strong trend in many organizations to incorporate OD qualifications and responsibilities into a wide variety of human resource positions. Worren, Ruddle, and Moore (1999) noted how large management consulting firms quickly acquired a variety of small and medium sized OD practices when clients demanded more change management services from them. Finally, most large organizations remain committed to tuition reimbursement for OD related educational programs.

Quantitatively, Golembiewski (2002), Porras and Robertson (1992), Anderson (2003), Neilson (1984), and others have provided substantial evidence (much of which can meet the challenging methodology questions listed above) that OD processes have consistently resulted in improvements in organization effectiveness. Golembiewski is perhaps the most outspoken advocate of the research support for OD. He notes that roughly 75% of the cases studied showed "attractive" success rates across a broad range of interventions, where he defined attractive as all or nearly all pre vs. post measures were in the intended direction. Moreover, nearly two-thirds of the differences achieved statistical significance.

In the end, the qualitative, quantitative, and historical evidence yields decent support for the conclusion that OD has a net positive influence in organizations. It is clear however, that practitioners and researchers need to spend more time and effort on evaluating OD efforts. The field has matured to the point where the rate of new intervention techniques has slowed considerably. It could benefit from assessment processes that are more refined. We can improve practice substantially by clarifying effectiveness criteria, defining process and outcome variables, gathering more data on processes and outcomes, sharing research results more widely, and connecting theory to practice in our discussions and literature.

Table 2 summarizes the implications that result from the OD debates and their resolution.

Table 2.
OD DEBATES and IMPLICATIONS FOR PRACTICE

OD Debates	Implications for Practice
Definitions	Influences the scope, depth, and breadth of practice as well as the knowledge base and skill requirements.
Conceptualizations	No practical impact on practice.
Credentialing	If credentialing were instituted, it could affect education requirements, accuracy in labeling, ethical behavior, and skill mastery.
Effectiveness	Research results should affect what one does and how they do it. Over time should eliminate less effective methods and increase best practices.

Toward a Theory of OD Practice

The purpose of this section is to integrate our own experience as consultants, researchers, and educators into an original theory of OD practice. At this stage of the field's development, there is room for wide variety in the practice of OD. Yet there are also *minimum distinguishing characteristics and intended ideals* that can define the basis of theory and bring some coherence to this part of the field. While any theory and model can only be a simplification of reality, they can be highly useful in separating one field from another and one type of practice from another. For example, models of human cognition and culture distinguish psychology from anthropology. An OD practice theory should distinguish it from other applied disciplines, such as engineering, innovation, or operations management. OD has long suffered from the lack of any such theory and consequently has been subject to the definitional and credibility debates outlined above. The description and

specification of this theory is necessarily tentative, but can serve as an important starting point for development of a more codified framework of practice.

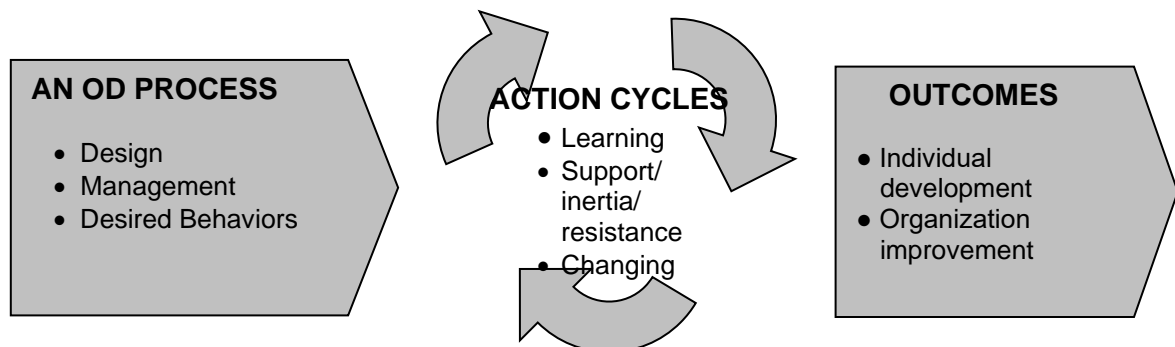
A theory of OD practice can be helpful in:

- identifying what practitioners need to do well,
- making design, intervention, and behavior choices,
- determining what belongs in OD education, and
- distinguishing OD from other types of consultation and especially from other change practices.

In proposing this theory, we assume that OD is an imperfect field of practice devoted to combining applied behavioral *science* and the *art* of change. It involves both subjectivity and objectivity. Given the values of the field – choice, participation, human dignity and learning – and its history, we also assume that the practitioner’s use of their own emotions and cognitions - the use of *self as the instrument of change* -- is essential in executing the *art* and *science*. Who you are – your own psycho-social state, character, knowledge, skills, and experiences -- is the instrument through which data must pass and many interventions must be executed.

Figure 1 organizes the *minimum distinguishing characteristics and intended ideals* of OD practice. OD practice always involves an *OD Process* in which people participate over time. The design and management of the process as well as the desired behaviors expected from the client and the practitioner characterize this element of the theory. The result of launching an OD Process is a series of individual and organizational *Action Cycles*. These cycles include learning, addressing various forms of support, inertia, and resistance, and changing some or all of the features of the organization. During an OD process, these intertwined dynamics begin to create changes first as trial and error and later as adjustments and adaptations. Finally, OD practice always intends to produce two kinds of *Outcomes* – individual development and organization improvement. We describe each of these three characteristics and ideals in more depth below.

Figure 1
A THEORY OF OD PRACTICE



An OD Process

An OD Process involves design, management, and desired behaviors.

Design. As shown in Table 3, the design of an OD process always includes five characteristics: a cyclical methodology, an open systems orientation, a specific value base, a set of interventions, and desired roles. First, a cyclical methodology, such as *action research* (Reason and Bradbury, 2001) or *self design* (Mohrman and Cummings, 1989), requires that a series of data collection, reflection, action, and reflection activities be followed by further data-reflection-action-reflection cycles. OD is a journey, not an event. This orientation recognizes that complex human systems go through “state changes” with each intervention and therefore needs new data to determine the next appropriate action. This belief in the changing state of human systems is core to OD and will show up in a wide variety of methods with cyclical characteristics.

Table 3
Characteristics of an OD Process

Design	<ul style="list-style-type: none"> • Cyclical methodology (e.g., action research, self-design) • Open systems orientation • Values base (choice, participation, human dignity, learning) • Interventions (structure, speed, depth, sequence) • Roles and relationships
Management	<ul style="list-style-type: none"> • Process path • Execution • Intended and unintended effects • Emergent situations • Behaviors and relationships
Desired Behaviors	<ul style="list-style-type: none"> • Intended consultant behaviors • Intended client behaviors

Second, OD processes also depend on an *open systems* orientation, which starts with an understanding that any system exists as part of a larger system that constitutes its environment. Basic system principals and dynamics (e.g., interacting parts, boundaries, exchanges across system boundaries, transformation processes, inputs-outputs, adaptation, cause and effect) are used in planning the process in terms of who to include, sequence and simultaneity, and feedback mechanisms (von Bertalanffy, 1969; Miller, 1978). A systems orientation also suggests that OD processes adopt a diagnostic and contingent perspective. Context is an important consideration in design (Gladwell, 2001). The client’s capacity and readiness for change, the type of change issue addressed, the complexity of the system, and the consultant’s competence must be taken into account and derive from this open system orientation.

Third, the *values* determining the choices made and built into an OD process differentiate it from other change methods. OD practice's core values are choice, participation, human dignity, and learning. In OD, there is a bias that will always show up in what is done and how it is done that will favor people having choice; being able to participate in decisions that affect their life; promoting norms of authenticity, honesty, openness, respect and fairness; and providing opportunities to develop their potential.

Fourth, any OD process represents a *series of interventions* that are defined as purposeful injections of information, activity, or interaction aimed at a target(s) of change. These interventions will vary in their sequence, complexity, speed, and psychological depth. Each intervention within a series serves one or more of several purposes, including:

- changing a “what” or a “how”
- disrupting the status quo (unfreeze)
- producing valid data, providing free choice, or building client ownership and internal commitment
- developing individual or organizational capacity/helping the client learn
- engaging people in developing their desired future
- identifying, surfacing, or working with support, inertia, or resistance

The *process of designing* this series of interventions also involves a *series of choices* usually made jointly by the consultant with their client. A set of specific considerations guide these choices and center around:

- the appropriate type of diagnostic and evaluative data that allow for and suggest action options
- the client's capacity to understand and take action on what's happening in the present state
- the client's readiness and motivation to change
- the type, level, and complexity of problem(s) and opportunities, or the breadth and depth of a desired future state or vision
- the system's complexity in terms of number of moving parts, interacting players, or relationships
- the consultant's competence, confidence, and willingness to execute a particular change

Finally, an OD process requires certain *roles and relationships*. Minimally, there are client and consultant behaviors needed for conducting any OD process. Certain behaviors (discussed below) distinguish these roles in an OD process. The size and scope of the undertaking may require additional roles (Old, 1995; Mohrman, 2002; Axelrod, 2002). These could include project leaders, centers of excellence, program management offices, design teams, change managers, or evaluation specialists. Members of the client system and/or the consulting team can fill these roles.

OD practitioners design OD processes with the guidelines outlined above and operate them with the characteristics discussed. Designs or methods that do not operate on these principles and values are probably not OD. Innovation, for example, also involves a variety of roles and actors, but the set of values and behaviors during change are not the same.

Management. Managing the OD process is the second major element. A series of interventions defines an *intended path* of change. However, as the interventions are executed during the cycles of action, an *actual path* of change emerges that rarely follows the intended path. Thus, an important part of OD work is managing the process by:

- monitoring and managing the *actual path* including making mid-course corrections, building in adaptations to unanticipated forces, and/or changing the path completely, if the change purposes shift significantly
- ensuring the quality and timing of *execution*
- evaluating the *intended affects* and monitoring *unintended consequences*
- incorporating *emerging conditions/environmental influences/erratic client behavior* (“stuff” happens)
- managing *client/consultant behaviors and relationships*

These management tasks are crucial to success because human systems are continuously changing entities with both predictable and unpredictable actions. Therefore, while *design* is an important part of the front end of an OD process, the *on-going design and management* of the change process in response to new data and changing conditions will make or break an OD practitioner’s work.

Desired Behaviors. Certain core behaviors are needed in OD to differentiate it from other forms of consultation. This is true in both the intended role of the consultant and the intended role of the client. The ideal client-consultant relationship does not just happen naturally. It requires continual management, reflection, and intervention. In the ideal relationship, the client and consultant operate in partnership (Old, 1995; Block, 1999). Each one models the importance of human dignity, participation, choice, and learning, and each joins in the design and management of the OD process. However, most clients do not start where they need to end up and most OD consultants have difficulty with one or more aspects of their role. As a result, the desired behaviors need to be specified, clarified, discussed, and managed along the way.

The OD practitioner brings expertise on the process of design, change strategies and methods, intervention, and facilitation. The core behaviors the consultant needs to master in an OD process include:

- education through modeling and influence
- collaboration through partnership
- an authentic, open, and trustworthy style
- the display of systemic and strategic thinking
- suggestions about design and execution processes and interventions
- inquiry and the ability to diagnose a system

- facilitation behaviors that structure, frame, question, support, and confront the system

The client brings more expertise in the “business” of the organization, better understanding of the “content” of the work, and accountability for the results. As such, it is critical that the client engages in, leads, and owns the process and outcomes. The core behaviors the client needs in an OD process include:

- leadership and decision-making
- commitment and engagement to actively own the change work
- open to learning and feedback
- an authentic, open, and trustworthy style
- collaboration through partnership
- the display of systemic and strategic thinking

Action Cycles

As shown in Table 4, the result of launching any OD process is a cycle of activities that generally involve individual and collective *learning*; various forms of *support / inertia / resistance*; and initial *changes* in individuals and organizational components. All three are natural and to be expected. They are necessary in any transformation or “change of state.” ***The iterative, intertwined processes of learning, working with support, inertia and resistance, and changing individual perspectives and organizational components ultimately create the desired outcomes of individual development and organization improvement.***

Table 4
Characteristics of Action Cycles

Learning	<ul style="list-style-type: none"> ● Individual/collective ● Mindset changes ● System knowledge ● New skills
Support/Inertia/ Resistance	<ul style="list-style-type: none"> ● Individual ● Political ● Cultural ● Systems
Changing	<ul style="list-style-type: none"> ● Individual ● Organizational system

Learning can occur on multiple levels (e.g., individual, group, organizational) and in either cognitions (e.g., the way people think) or behavior (e.g., how they act) (Tenkasi, Mohrman, and Mohrman, 1998). Learning can be limited to some individuals or more collectively and deeply internalized by the organization in the form of new cultures, systems, processes, and structures. Common types of learning include changed mindsets (perspectives, orientations, or ways of thinking); better understanding of their system’s strategies, structures, processes,

cause and effect relationships and real strengths and vulnerabilities; and new skills in leading, managing, and changing their organization.

Various forms of *support/inertia/resistance* can operate in the different stages of an OD process. In tangible or intangible, conscious or unconscious ways, people can create either positive energy toward or negative energy away from the achievement of the intended outcomes. Support or resistance can originate from an individual's self-interest, political bases of power or entitlement, cultural forces rooted in operating values, or derive from "system" reactions to the stresses of misalignments during change or the relief of fit when components fall into alignment.

The initial *changes* can be minor or major; in parts of the organization or organization-wide; and relatively easy or very difficult. Changes need to occur in the individuals who will work in the changed system, the organization's strategy, structure, culture, and systems, and the alignment among them. Changes first occur as trial and error, adjustments, and adaptations before they become institutionalized or operational changes. In line with our definition of OD, the organization must make these changes explicit. It is not enough to say that "things" have changed. Such fuzziness thwarts evaluation of an OD effort.

The actual path of change, with its twists and turns, adaptations, and conscientious management, emerges over time. Learning, encountering inertia, working with support and resistance, responding to environmental shifts and emerging situations, and executing the intended changes create the opportunities for real-time problem solving. As partners, the consultant and client are the architects guiding the organization and its various stakeholders along the path.

Outcomes

As shown in Table 5, at least two classes of outcomes, along with any other project-specific outcomes, distinguish an OD effort. Outcomes occur primarily towards the end of the actual change path. The first important class of outcome is individual development. OD processes help individuals grow and increase their potential. Part of the learning that occurs involves improving people's capacity to lead and manage change in the future and their potential to do what they can do best. These outcomes usually show up in knowledge, skills, behavior, and attitudes.

Table 5
Outcomes of the OD Process

Individual Development	<ul style="list-style-type: none"> • Knowledge • Skills • Behaviors • Attitudes
Organization Improvement	<ul style="list-style-type: none"> • Performance • Capacity • Culture

The second important class of outcome is organization improvement. OD efforts specifically target three types of improvement: performance, capacity, and culture.

First, while “performance” and “improvement” are often in the eye of the beholder and can be viewed through a wide variety of measures, OD efforts always expect to help the organization get better at what they exist to do. Performance involves a variety of mission-related results that could include revenues, profit, customer service, production, clients served, environmental or social impact, market share, firm valuation, costs, cycle time, and quality. Often, other internal factors become metrics used as precursors or intermediate indicators of performance and include employee satisfaction, quality of work life, alignment, and various operational measures. The client-consultant contracting process should clarify the specific performance improvement outcomes sought.

Second, OD efforts differ from other forms of consultation and change in that the clients’ learning, or the capacity to manage change in the future, is an important part of the work. Increasing an organization’s collective capability to lead, design, and manage change has always been central to OD consultation. This outcome differs from the individual development outcome. It focuses on a critical mass of people in the organization knowing how to work together differently in their efforts at managing changes.

Finally, OD operates according to a specific set of values. These values not only guide the design of change processes but also describe intended ways of life in the organization. Therefore, each engagement attempts to create workplaces where choice, participation, human dignity, and learning are characteristic of the culture. When early pioneers talked about OD as “culture change” (e.g., Beckhard, 1969; Bennis, 1969), their vision was one where all organizations would internalize basic OD values into their way of operating. Culture was an appropriate target for OD since it was a reflection of the values operating to guide and shape the behavior of organization members.

Summary

Out of years of experience and the evaluation of effectiveness, a *core practice* has evolved to which most experienced professionals would concur. Most of the schools providing comprehensive OD education teach this core practice. It differs from change management, management consulting, operations research, industrial engineering, and other applied approaches to organization improvement, *primarily* through (Jamieson, 2006):

- its values base,
- its integration of behavioral sciences with leadership, strategy and organization design,
- the nature of the consultation role and the use of the client-consultant relationship as part of the change,
- its series of *client-centric* (capability and readiness) interventions in action cycles,

- its inclusion of individual and organizational learning, development, and capacity building in the desired outcomes.

To the extent that this Theory of OD Practice reflects the appropriate categories and characteristics of knowledge and skill, the question remains, “how do we best develop practitioners of change?” For the past 20 years, the authors have been intimately involved in the development of practitioners through both formal educational programs and internal management and leadership development projects. The final section of this chapter brings our experiences and beliefs to bear on the issue of educating and developing OD practitioners.

Educating for OD Practice

The Theory of OD Practice suggests certain areas of knowledge and skill necessary for good practice. Table 6 presents the categories and characteristics of practice and their associated educational requirements.

In the context of the practice theory above, exactly how does one learn to become an effective OD practitioner? Answering that question requires a) an understanding of the necessary competencies and b) a process for acquiring those competencies.

Competencies for OD Practice

Recent research suggests convergence on the competencies necessary for good OD practice (Worley and Varney, 1998; Worley, Rothwell, and Sullivan, 2005; Eisen, Cherbeneau, and Worley, 2005). They include organization behavior, group dynamics, organization theory, and different functional areas as well as skills in organization design, facilitating change, research methods, personal growth and cross-cultural communication, managing the consulting process, and developing client capability to help systems change over time.

The broad range of skills, knowledge, and competencies envisioned for OD practitioners and the broad overlap among most of them suggests that educational programs should have a relatively easy task of ensuring that their curriculums meet some minimal level of coverage *and* can emphasize certain facets of OD that fit with institutional or school missions and faculty capabilities.

Education Programs to Acquire Competencies

OD education can come from three sources: (1) experience and mentors, (2) workshops and certificate programs, and (3) formal degree programs, especially masters and doctoral level education. Experience and mentorship are important sources of OD competencies. As an applied field, OD is a little like playing golf or riding a bike – you cannot just read a book and be able to conduct effective OD processes. Knowing how organizations work, understanding the pressures organizational members and managers feel, and navigating the range of technical and ethical choices available is best learned by doing.

Table 6
OD Practice Theory and Educational Requirements

	Aspect of Theory of Practice	Education Need
OD Process	Design	<ul style="list-style-type: none"> • Action research, Self-design • Organization environments, open systems theory • Assessing client capacity, readiness, emotional intelligence • OD values base • OD intervention methodologies to work with individuals, small groups, large groups, and organizations • Planning methods (vision, goals, action) • Consulting skills
	Management	<ul style="list-style-type: none"> • Leader coaching, facilitation • Project management • Data collection, research methods • Interpersonal relations, group dynamics • Presentation/ communication skills
	Behaviors	<ul style="list-style-type: none"> • Consultation skills, “self-as-instrument”, influence • Openness, collaboration, authenticity • Designing, inquiry, facilitation • Strategic thinking • Interpersonal relations, communication, decision-making
Action Cycles	Learning	<ul style="list-style-type: none"> • Adult learning • Instructional design
	Support/Inertia/Resistance	<ul style="list-style-type: none"> • Culture • Group dynamics • Motivation • Physics
	Changing	<ul style="list-style-type: none"> • Change theories, systems theory • Causal analysis • Individual psychology • Strategy • Job and work design, organization design, culture
Outcomes	Individual Development	<ul style="list-style-type: none"> • Measurement, assessment
	Organization Improvement	<ul style="list-style-type: none"> • Organization effectiveness • Organization economics • Finance • Operations management

Workshop and certificate programs are also very common sources of knowledge about OD. They can range from one-day seminars on specific subjects, such as group facilitation, culture change, training design, or change theory, to multiple session certificate programs in organization design, OD, or specific interventions. These programs can be aimed at beginners in the field (e.g., OD Network, University Associates, and Linkage conferences) or to advanced practitioners (e.g., USC's Center for Effective Organizations and Columbia University).

Formal educational programs in OD have existed since the mid-70's when the first master's degree programs were created at Pepperdine, Benedictine, and Bowling Green State Universities. Since that time, undergraduate curricula in schools of business, education, psychology, sociology, communication, and public policy have expanded to include OD and other organization change related courses as electives. However, the focus of most OD education has been at the masters and, increasingly, the doctoral levels. The number of masters degree programs grew in the 1980s and has remained relatively stable (Varney and Darrow's (1997) studies identified over 22 programs). Most of the masters level programs are based in the U.S. but a few, including the University of Monterrey (Mexico), are international and have existed for more than 25 years.

Many of the masters and doctoral programs have formally or informally adopted the OD competencies model developed by Varney and his colleagues (e.g., Worley and Varney, 1998) and there is an increasing homogenization of basic curriculums. This is both good and bad for the field. It is good because there is an emerging agreement about the skills and knowledge needed to be a competent practitioner and the educational system is working to build this foundational level of competence.

It is also a potential problem because too much homogenization could stifle creativity and innovation in both education and practice. The field is broad enough to warrant specializations. Fortunately, and despite some homogenization, program designs are retaining a certain level of uniqueness. Curriculums at different schools are focusing on traditional process skills, international and cross-cultural OD, strategy, positive scholarship, research, and environmental sustainability. For example, Case Western Reserve University has recently redesigned its master's degree program around sustainability and positive scholarship, while Pepperdine University has been implementing a design emphasizing the integration of strategy and OD in an international context. American University/NTL focuses more on group dynamics and small systems interventions and Eastern Michigan University has developed an extensive program integrating HR and OD. A similar diversity in thought seems to be pervading the doctoral programs; both alternative and traditional designs offer a variety of academic emphases.

While the current masters level programs seem to be coalescing around the key competencies, their biggest struggle is the focus of this chapter. How exactly is a person interested in OD to get the requisite experience needed to become proficient at the practice of OD? Some schools offer internships that provide opportunities to conduct change projects in real settings. Other schools leverage fieldwork during weeklong classes or require full time employment to allow application of the concepts. This helps in the practical application

of interventions, but still leaves open opportunity to apply what is arguably one of the more important and central aspects of OD practice – the interpersonal. T-groups and other forms of sensitivity training that formed the early base of practice have fallen out of favor. Most master's degree programs (Pepperdine University and American University are the two prominent exceptions) no longer require any form of clinical training. This seems unfortunate given the field's social science traditions and the importance of "self-mastery."

The number of doctoral degree programs has been the fastest growing segment of OD education. While OD classes have always existed in traditional doctoral curriculums in many business, education, and psychology schools, the specialized (or Executive) OD doctoral program has become more popular. Degrees at the Fielding Institute, Benedictine University, Pepperdine University, Alliant University, Cranfield University, and others are building strong reputations in developing "scholar-practitioners."

The term "scholar-practitioner" has emerged and captures well the intent of most graduate level degree programs in OD. That is, there is a balanced focus on developing participants. They should have the competencies to conduct effective OD processes in practical and applied settings. In addition, they should be aware of and capable of contributing to the body of knowledge through various methods of research.

The major differences in education programs and in practice seem to be: 1) the emphasis placed on specific methodologies versus a broad strategy of change technologies; 2) the emphasis on diagnostic depth versus use of techniques; and 3) the use of "self" and consultative skill versus programmatic application of semi-structured methodologies.

To be an effective OD practitioner, internal and external change agents must have the requisite knowledge, skills, and perhaps most importantly, the experiences to design and manage OD processes, implement action cycles, and evaluate outcomes. This requires considerable education in the core knowledge and skill areas, intensive personal growth work in clinical and intrapersonal reflection, and enough practice to build a fund of tacit knowledge and skill to sense what to do and when to do it. This is a tall order, but if the field is to advance, setting high standards will help build a positive reputation and drive positive outcomes.

Summary and Conclusions

Over the past 50 years, OD has grown and evolved. The debates in the field have at times helped, and at other times hindered that evolution, but leave open the question, "Has OD matured?" To hasten its maturity, we believe the time is right to converge on some agreements.

We should not lose sight of the field's roots. The foundations are still important to the core of the practice. Choice, participation, human dignity and learning values are powerful guides for design, interventions, and behavior. Action research and other data-driven methods are effective processes for engaging clients in purposeful change. Using the self as an

instrument of change, keeping an eye on the client system's learning and capacity building, and working to transfer knowledge fulfills the development mission inherent in OD.

But the roots of the field should not act as blinders to its vision. The nature of today's strategic issues, including globalization and diversity, the proliferation of new technologies, the implementation of alliances and networks, and accelerated change, demand new solutions requiring much of what OD has to contribute (Greiner and Cummings, 2005). OD started where its founders perceived the need was the greatest, *at that time*. They would certainly applaud the application of the essence of OD to today's most pressing organizational and human needs. Moreover, the questions about OD's effectiveness should not remain so ambiguous. The field needs better answers to the questions about how to improve organization performance and build change capabilities. They are part of the differentiators of OD and are therefore warrant rigorous research attention.

Better practice and better-educated practitioners will also hasten the field's maturity. Our hope is that the theory proposed here will start a vigorous dialogue on what constitutes good OD practice. But good practice and better-educated practitioners are an integrated dilemma. Although most educational programs have generally adopted foundational skills and knowledge into their curricula, few go far enough in building the experience base. Given our proposal to use education as a proxy for credentialing, the best educational programs will require significant organizational experience as an admission requirement, and will find ways to increase the amount of supervised practice.

In other fields, such supervised practice is a required part of their credentialing process and entry requirements. OD does not have such a formal, structured entry process, but it does share some commonality with these fields in that each requires the practitioner to work with people in conducting their practice. It is where theory becomes action, circumstances need to be factored in to action choices, and "client feedback" differs across situations and changes the diagnosis. In fields where "self as instrument" is a central concept, learning in real contexts is the only way to see what different situations look like and understand the intended and unintended results of interventions. When this can be done under the guidance of someone experienced, learning can be accelerated and one situation can provide learning for numerous similar situations.

In OD education, this can be difficult and expensive to implement. It requires both experienced practitioners with enough time to supervise someone else and organizational sites with real time issues to work on. There are enough experienced people in the field now that there should be a way to use the universities, their alumni, and the professional associations to create a clearinghouse for connecting students and field mentors as part of the education process. Similarly, organization sites need to be identified through students, the professional association members, internal or external consultants, or OD program alumni.

Finding ways to add more experience-based learning will go a long way towards generating better-educated practitioners and enhancing the field's credibility. In addition to gaining

experience under the watchful eye of experienced practitioners, we believe a few areas of learning need greater emphasis in developing competent practitioners because certain skills and knowledge seem to be less effectively used in practice:

- With or without T-group-like experiences, practitioners need to work on the skills and attitudes associated with the *self-as-instrument* concept. In a field that involves working with change in people and human systems, this competence must rank high on the developmental list.
- Building effective *client-consultant relationships*, especially in *contracting*, *boundaries*, and *power dynamics*.
- In the area of *consultation*, more theory is needed to address what is consultation and what makes it effective. Specifically, there needs to be more work on the core, but less tangible, processes of *diagnosis* and *intervention strategy and design*.
- Finally, there is still much to learn about *change* in individuals, groups, and organizational collectives. Both problem-based and appreciative changes have a variety of necessary conditions, motivations, phases, and needed interventions to be effective and sustaining.

As the field has expanded in both the scope of targets and the substantive issues it addresses, today's practitioners cannot excel at all aspects of OD. There is room for some specialization by specific use of one's previous work life or other education degrees. This would be an additional signal of OD's maturity. In any case, what needs to be common among the diverse community of practitioners is their understanding of organizations, systems, change, consultation and "self" and how to use the values of human dignity, learning, participation, and choice in the design of change processes, intervention cycles, and evaluation efforts. The theory of practice proposed here takes an important first step in integrating those issues into a single framework.

There is much to be done in improving both research and practice in OD. The field has grown and developed in many ways, and it must continue to evolve since organizations and their environments will keep changing. Despite recent criticisms, the current state of the field seems healthy in many ways. The number of OD program students and alumni is growing, the volume of OD-related jobs is up, membership in the professional associations is increasing, and many organizations consider OD interventions mainstream practice. We hope that our colleagues heed the recommendations and proposals outlined in this chapter.

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