

Organization Development Review

JOURNAL OF THE ORGANIZATION DEVELOPMENT NETWORK

ISSN 2640-0650

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Organization Development Review

Published quarterly
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Organization Development Network, Inc.
ISSN 2640-0650

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PhD and MSMOB-OD Programs
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Whitehouse & Company, New York, NY

Production

Frank Brayton, San Francisco, CA

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Non-profit	\$150	\$160	\$180
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Organization Development Network

Organization Development Network

1000 Westgate Drive
Suite 252
Saint Paul, MN 55114

T: 651.379.7292
F: 651.290.2266

E: odnetwork@odnetwork.org
www.odnetwork.org

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Strategic Change

Welcome to the summer issue of the *Organization Development Review*.

The first part of this *ODR* issue is devoted to **Matt Minahan's** Change Our Name, Change Our Game: It's Time for "Strategic Change." Minahan affirms that as a result of OD we have been vibrant and thriving advocates for people over profits, we have fostered relationships and employee engagement, we have helped people find a voice in their own workplaces, among many other accomplishments. However, Minahan calls us to wake ourselves to a field that may be irrelevant in 10 years. Unless we do so, in 20 years the OD field may be extinct.

Nine colleagues share their perspective on the situation: **Robert J. Marshak, David Coghlan, Rebecca Slocum, Gervase Bushe, David Jamieson, John Conbere and Alla Heorhiadi, Yabome Gilpin-Jackson, Peter Norlin, and Mee-Yan Cheung Judge.**

The second part of this *ODR* is devoted to the future of OD, how to foster sustainability, preparing effective coaches while building coaching competence into the organization's culture, and a crucial stage in the practice of Appreciative Inquiry.

Lisa M. Meyer argues that an important and often overlooked reason for the decline of OD is that despite having a rich history of innovation theory and practice, OD has over time little to say about how organizations create value and, as a result, there is no explicit "theory of the firm" for OD.

Sustainable organization change, according to **Justine Chinoperekweyi**, requires innovation and the integration of the theory and practice of organization development. Therefore, there is a need for corporate governance literature and discussion to precisely capture the practice of organization development not as a mere consultant role or peripheral corporate governance

function but as a strategic and operational imperative.

Debra Hamilton focuses on preparing leaders to become effective coaches while building coaching competence into the organization's culture. Hamilton also shares what she has learned about how managers make the transition to coaching.

R. Sankarasubramanian and Dr. Wasundhara Joshi propose that the Appreciative Inquiry process include a pause between the infused phase of discovery and dream, and the action oriented phase of design and destiny/delivery. There is need to completely Drench in the dream to let the new imagined world soak into the system.

Finally, **Therese F. Yaeger and Peter F. Sorensen** offer a case study, Bad News at Bold Bank.

John Vogelsang

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

Deepening Our Understanding of Use of Self

Call for Articles

While the Use of Self has been around the OD field since the early founders began, there has been little direct literature written in OD about it. Thankfully, various elements have been discussed along the way from gestalt, interpersonal relations, social psychology, psychotherapy, and basic individual psychology, some aspects of leadership and some focused in social work and nursing. It is time we work on expanding and deepening our understanding of use of self and how it plays important roles on the impact and results of what we do and what all professionals involved in serving and helping do. We want to know what people are doing, how people think about and use the concept, how they learn about it and continue to develop themselves, and what people think should be done to improve the understanding and use this critical aspect of our self-management. We need to become clearer about what it is, how it influences our impact, How we need to teach it, and the pathways to continuous development of our Use of Self as we progress in our practice.

We invite articles that explore topics such as (but not limited to):

- » How has the concept of Use of Self contributed to the field, especially in improving the effectiveness of the field of OD?
- » What will the field look like if we do not focus on Use of Self?
- » Are there generational or cross-cultural differences in working with Use of Self?
- » What have we done well in promoting Use of Self? What more do we need to do?
- » What are cross disciplines' views on Use of Self, and the implications on practice?
- » What type of educational and development programs should we innovate to help OD practitioners to engage in this life long development in their Use of Self?
- » How can we assess use of self? The improvement and development over time?
- » How do we measure the impact of Use of Self on others and the system?
- » Does Use of Self have different applications at different levels of system?
- » What is the importance of Use of Self in sustaining the future of the field?

- » How can we bring Use of Self to other critical roles serving and helping others such as leaders, doctors, professors, etc?
- » How do other fields of knowledge treat the subject of Use of Self?
- » What are other needed research questions to improve our understanding and how widely it gets considered?

We encourage submissions from around the world.

The articles submitted can be:

- » Regular articles (up to 4,500 words)
- » Shorter articles (up to 1,600 words)
- » Brief notes (approx. 600 words)

In addition, we invite quotes about why Use of Self is important in our work and in sustaining the future of the field.

**Submissions due by:
September 1, 2019**

Send to: John Vogelsang jvogelsang@earthlink.net; **Mee-Yan Cheung-Judge** lmycj@quality-equality.com; and **David W. Jamieson** jami1396@stthomas.edu.

Thank you.

Special Issue Guest Editors:

Mee-Yan Cheung-Judge, BSc, MA, PhD, is a “scholar-educator-practitioner” working globally with organizations to deliver powerful transformational change. She is a senior visiting Fellow of Roffey Park Management Institute in the UK and the Singapore Civil Service College. She founded the OD Network in Europe and has been the Dean of the NTL European OD certificate. She is the author of numerous OD articles, books, and reports. Cheung-Judge was a recipient of the ODN’s *Lifetime Achievement Award* in 2013, the *Richard Beckhard Award for Contribution to the Field of OD* by IODA in 2016. *HR Magazine* in the UK voted her one of the top influential thinkers in the field of HR in 2008, 2013, 2014, 2015, 2016, and 2017, culminating this year in naming her to the top of its rankings as the most influential thinker of 2018. She can be reached at lmycj@quality-equality.com.

David W. Jamieson, PhD, is Professor and Chair, Organization Development Programs, at the University of St. Thomas. He is also President of the Jamieson Consulting Group, Inc. and a Distinguished Visiting Scholar in other OD programs. He has nearly 50 years of experience consulting to organizations on leadership, change, strategy, design, and human resource issues. He is a Past National President of the American Society for Training and Development and Past Chair of the Management Consultation Division and Practice Theme Committee of the Academy of Management. He was recipient of *The Lifetime Achievement Award* from the Organization Development Network (2012) and *Distinguished Scholar-Practitioner Career Achievement Award* from the Academy of Management (2015). He can be reached at jami1396@stthomas.edu.

“Unless we wake ourselves from this reverie, the field as we know it now will be irrelevant in 10 years and extinct in 20. We can’t afford to be people of the stars without the serious grounding in business and operations that the real world demands today.”

Change Our Name, Change Our Game.

It’s Time for “Strategic Change.”

By Matt Minahan

In signing off *American Top 40*, Casey Kasem used to say, “Keep your feet on the ground, and keep reaching for the stars.” It was a colloquial way of saying dream big but be realistic.

I’m afraid that for the past 4 decades if not more, OD in the US has taken the “dream big” part to heart but ignored the “be realistic” part. And has brought us to the brink of our own demise.

We have been a vibrant and thriving advocate for people over profits. We have brought an emphasis on relationships and employee engagement to the relentless focus on the bottom line. We have built teams in places where no one thought possible. We have given people a voice in their own workplaces. We have empowered workers and increased self-determination. We have built capacity and made organizations stronger for our efforts.

In short, without the work that we in OD do, the world would be worse, organizations would be worse, jobs and work would be worse. And we would be sitting at a desk somewhere. Or painting. Or teaching yoga. Or riding our Harleys on road trips. Maybe we’re doing all those things already today along with our OD work.

But in the future that might be all we’re doing unless OD wakes itself—ourselves—up and starts to take itself seriously. Take our selves seriously. Take our businesses seriously. Take our clients seriously. And play a bigger game than the one we’ve been playing for too many decades.

We are discovery-ing, dream-ing and destiny-ing ourselves into a wonderful life in the stars . . . and irrelevance.

A serious look in the mirror shows that, especially in the US:

- » Our members are aging.
- » Our numbers are declining.
- » Though several are thriving, most of our graduate programs are struggling.
- » Our graduates are doing talent management more than organization design.
- » Most are blithely toiling away in the social and symbolic systems, while too many are afraid to touch the technical or political systems.
- » We have allowed the HR function to coopt our work and our jobs.
- » Adjoining fields such as HR, coaching, and change management are larger, stronger, offer certifications and have empowered their membership associations to take leadership of the field.
- » We talk about a “seat at the table,” but too few of us can speak credibly about business problems with a CEO or COO. We don’t speak or understand the language of business.

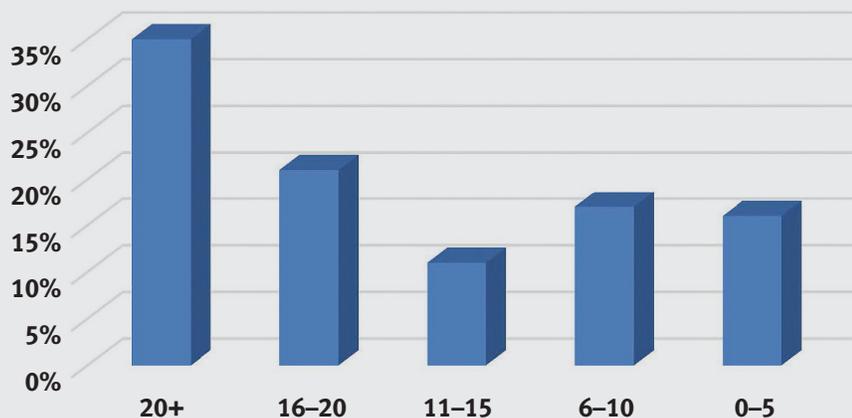
Unless we wake ourselves from this reverie, the field as we know it now will be irrelevant in 10 years and extinct in 20. We can’t afford to be people of the stars without the serious grounding in business and operations that the real world demands today.

This is Not News

I’d love to say that these are brand new insights. But these truths have been self-evident to our elders and betters for years.

Table 1. *We are Aging*

Percentage, Years in OD



Data sourced and used with permission from (Shull et al., 2014)

As early as 1972, Larry Greiner raised red flags around OD's inclination to prioritize the individual over the organization, weighting the informal over the formal organization, pushing managers to be "participative, open, confronting, or authentic" regardless of the culture within the organization, and making process more important than task (Greiner, 1972, p. 19).

In 2004 Warner Burke and David Bradford dedicated an entire issue of the *Journal of Applied Behavior Science* and a book a year later raising the specter of OD's demise. In the first few pages of the book, they make the point that OD practitioners are not at the table of power, don't have expertise in business strategy, don't understand the language of business and how profit is made and costs contained, and in the increasingly rare instances where there is an internal OD function, it is too often buried layers deep in the least respected department on the org chart, HR. Yet most OD folks will tell you that they are doing meaningful OD work (Bradford & Burke, 2005, p. 8-9).

In a cringeworthy description of the people of the stars, Jerry Harvey describes a dying OD by saying, "at various times, she said she did empowering, deconflicting, leadershiping, coaching, gridding, sensitizing, feedbacking, spiritualizing, T-grouping, Rolfing, managing, appraising, diversifying, Myers Briggging, renewing, life balancing, energizing, storytelling, holistic knowing, mind mapping, group learning, team building, Enneagramming,

re-engineering, and a bunch of other things I can't recall" (Bradford & Burke, 2005, p. 17).

This isn't breaking news. "OD has virtually disappeared as the title of departments in many organizations. During the late 1970s and 1980s, OD became a bad word in many companies, and this remains so today" (Greiner & Cummings, 2004).

Chris Argyris describes working with 24 OD consultants self-described as "humanistic, interpretive, and existential." He challenged them to test the validity of their claims, but they said that a humanistic perspective did not require independent testing, which Argyris cited as the defensive reasoning mindset that is devoid of double loop learning (Argyris, 1990).

Who We Are, and What We Do

In a recent demographic survey of OD practitioners (Shull, Church, & Burke, 2014), the 388 respondents were 50% externals, 39% internals, and 10% academics (5% full time faculty, 4% tenured faculty, and 1% researchers.) (More on the 1% problem ahead.)

In general, we are a well-educated bunch. Among the respondents, 60% hold a master's degree and 31% hold Doctorates.

We are also an aging bunch. A third of us have 20+ years in the field and more than half of us have 16+ years in the field. (See *Table 1.*) If demography is destiny, this inverted bell curve is not good for the field.

Our answers to the "why did you join the field" question are revealing. In diminishing order, the top 4 reasons we joined the field were to help people, enhance self-awareness, make the world a better place, have social contact and human interaction. Notably, collecting data and generating theory didn't make the top 10, and promoting evidence-based practices and using research and statistical skills didn't make the top 20.

As people of the stars, in practice

- » We define ourselves and our work with a label "Organization Development" that means something to us people of the stars, rather than using language understandable to people with their feet on the ground.
- » We satisfy ourselves by working at the individual, small group and team levels of the organization rather than the larger business unit or whole system levels where there is the most leverage for lasting change.
- » We refuse to acknowledge that the majority of OD jobs today are actually HR jobs in talent management, training, and elsewhere, rather than accepting the on-the-ground reality that true OD jobs around strategy, structure, business process, and culture change are increasingly extinct.
- » We defend qualitative data collection through interviews and focus groups as adequate for collecting data in large organizations, rather than learn and embrace the analytical tools and knowledge to conduct surveys and do true large-scale research.
- » We revel in our successes in intervening in the social systems of our clients, with little or no attempt to intervene and impact the technical or political systems.
- » We perpetuate the myth that our work cannot be measured in financial terms, rather than building the muscle to compute return on investment (ROI) calculations that can actually make a financial case for our work.

Those are just a few of the challenges on the "practice" side of theory and practice.

On the theory side

- » We assert that the field is relevant to work and organizations in the 21st century, but the truth is that there is little to no research being done in OD, and what is being done has very little relevance to the work that we as OD practitioners do.
- » We don't read scholarly writing, and if we do subscribe to journals such as the *Journal of Applied Behavioral Science* or *Academy of Management Review*, we often don't read them, and too often, they are not relevant to our work.
- » We ignore the fact that there are very few full-time faculty positions in OD programs. Most programs hire adjunct faculty who bring their work experience to the teaching of OD. While that is mostly good news for students who strongly prefer more practical and applied OD coursework with tools they can use back on the job on Monday morning, there are too few full-time faculty pursuing legitimate research questions.
- » We resist the reality that, with a few notable exceptions, OD graduate programs are struggling. The overall number of OD graduate programs is shrinking. The overall number of OD students is shrinking. Education benefits which paid for many OD students are almost a thing of the past. Programs are accepting students who are younger, whose actual work experience is quite limited.
- » We ignore the fact that many business schools added change to their OD programs and textbook publishers followed suit (Bushe & Marshak, 2018). OD and change are now intermixed and almost indistinguishable. Try as we might to say that OD is not just about change, in the real world, managers, leaders, and our customers can't really tell the difference.

Meanwhile, directors in OD academic programs complain that their deans and chairs don't value their programs. In a recent phone call among OD academics and authors, program directors generally agreed when one said quite starkly, "They

just tolerate us, and probably will so, as long as we continue to make money. After that, we'll be gone, too." Another agreed, adding "We're irrelevant in my school. The school doesn't consider us an asset and they treat us as such."

The Fault is in Our Stars AND Ourselves?

There are some attributes of OD people writ large that conspire to keep us marginalized and ineffective.

We help our clients see how they fit into the larger system; we help them see the forest instead of just their own tree. Yet, it is only rarely that we get the helicopter view of our own field to see the shape and health of our own forest. At last estimate, admittedly some years ago, less than 10% of OD practitioners were members of the OD Network. Approximately 10 times more belonged to regional OD Networks, but after decades of valiant effort, it has been impossible to persuade the regional networks to affiliate with the national Network. We have our trees and we're not going to let go of them.

Imagine SHRM or ATD or any other modern membership association in which the local chapters were independent of the national association, using its name and reputation but with no obligation toward shared members or revenues. Sadly, that is the fragmentation within OD, and we have no way to fix it.

In that regard, we were blessed by our founders in the 1960s with the revolutionary-at-the-time *network* structure, deliberately loosely coupled, that worked well through the mid-1990s when the OD Network had a monopoly on change agents. But as coaching, HR, training, change management, project management, and other newer disciplines emerged, they formed newer, more modern associations with local chapters tightly coupled to the national organizations, realizing the synergy among them all. They built a forest.

The Danger of Holding On and NOT Letting Go

Our persistence in holding on to our past, stolidly maintaining our independence,

unwilling to align with each other and yield a bit of independence for a greater good, ends up only isolating ourselves to just our tree view of the field. Meanwhile, all the signals from the outside environment are flashing red, shouting at us that the forest is under threat from larger and better organized ecosystems, and that our own forest is on the verge of collapse.

We romanticize our past and we lionize the founders of the field, way beyond what the world of OD today requires. Read any history or overview of OD today, and it will necessarily begin with pages of paean to T groups and NTL going back to the 1940s. (As a long-time NTL member and T-group dean myself, I have huge respect for the T-group form and the transformative growth it can enable in today's world.) But the OD that we practice today is so far removed from the field's origins that I question our perpetual obeisance to our past, and believe that it keeps us trapped in our allegiance to where we've come from, and unable to accept that, for as fond as we are of our origin story, it will not help us create a new future for our forest.

What if we could build a new narrative about organization development that didn't begin in an era that no one alive today can remember but spoke of improving organization performance and individual development in our lifetimes? Isn't that a narrative that would serve us better?

On a Smaller Scale

Try facilitating a meeting of facilitators or a work conference for OD people. Herding cats is one of the nicer metaphors. Stampingeding mules often feels closer to the truth. Participants challenge the design, question the agenda, undermine the meeting leader. At its most benign, this is about improving the experience for everyone. At its more covert, it is about challenging the leadership of the meeting in a battle for primacy and control. Ironically, we ask our clients to "trust the process," and yet we do not grant that same grace when we ourselves are in leadership roles.

We are torn between competing impulses, wanting on one hand to be included in top level decision making,

Table 2. *Dimensions of Change*

Dimensions of Change	Theory E	Theory O	Theories E and O Combined
Goals	Maximize shareholder value	Develop organizational capabilities	Explicitly embrace the paradox between economic value and organizational capability
Leadership	Manage change from the top down	Encourage participation from the bottom up	Set direction from the top and engage the people below
Focus	Emphasize structure and systems	Build up corporate culture: employees' behavior and attitudes	Focus simultaneously on the hard (structures and systems) and the soft (corporate culture)
Process	Plan and establish programs	Experiment and evolve	Plan for spontaneity
Reward System	Motivate through financial incentives	Motivate through commitment—use pay as fair exchange	Use incentives to reinforce change but not to drive it
Use of Consultants	Consultants analyze problems and shape solutions	Consultants support management in shaping their own solutions	Consultants are expert resources who empower employees

Reprinted with permission from Beer and Nohria (2000), page 137

working with the dominant coalition, and wanting our work to have an impact versus on the other hand wanting to maintain our boundaries and stay at the margin. We have mistakenly told ourselves that a system can only be truly seen from the outside, and that once inside, the system has coopted us. Tell that to the many internal OD practitioners who are greatly valued for the depth of their knowledge and insights into the operations and culture of their own organizations.

We are counter dependent and resist authority. Having administered the FIRO-B to OD practitioners and students for the last 30 years, there is a large concentration of extremely low (0–1) scores on the 9-point scale for Wanted Control (wC), which is about our comfort in situations defined by others. While fierce independence has its merits, it makes it difficult to work with or under others, and an unwillingness to be guided or managed by others (Minahan & Norlin, 2013).

That counter-dependence creates resistance to authority and undermines the very efforts the field needs to consolidate and advance itself. We are relational people, but we don't like to join. We preach collaboration in our client systems and yet we are unwilling to collaborate well enough to create large scale change among ourselves or the field. We work in ones and twos because it allows us the greatest flexibility and absolves us of fitting in with others.

We counsel our coaching clients to work constructively with their bosses, to delight their bosses, to see the larger picture, to understand the context of their work, and to shift from analysis to action. Ironically, around our field, the cobbler's children have bare feet, the doctor's kids are sick, and we are unable to follow our advice.

If we could manage to get out of our own way and pull together toward a common vision for the field—which is exactly what we ask of our clients—could we possibly see our work contributing to the overall organization and effectiveness of the field AND the individual development of us as practitioners?

A Failing Duality

In some ways, we've planted the seeds of failure for ourselves by holding on to either/or thinking about OD. Appropriately so, we teach about the differences between *content* and *process*. *Task* and *maintenance*. *Work* and *play*. We want OD people to be clear about the differences and make choices appropriate to the situation.

But that same dualistic thinking has brought us to other forced choices that are not as clear and not as helpful. We are caught in the tension between *touchy-feely* versus *bottom line oriented*. *Airy-fairy* versus *nitty gritty* (Marshak, 2005). *Humanistic* versus *business oriented*. *The worker* versus

the man. *Labor* versus *management*. *People* versus *profits*. *Individual* versus *team*. *The needs of the one* versus *the needs of the many*. As a field, we talk a lot about polarities and how to avoid either/or thinking, but in truth, the world, and our work is riddled with them.

But What If We Could Make This a Both/And?

What if we could make the field about *improving organizational performance AND enhancing individual development*?

One of the best statements of both/and thinking in OD is a combination of Theory E change and Theory O change (Beer & Nohria, 2000). The authors argue that real, true change only occurs when both Theory E change *and* Theory O change are present. (See Table 2.)

Many OD practitioners will find the elements of Theory E change offensive: maximize shareholder value, manage change from the top, motivate via financial incentives, and expert consultants who bring solutions to the organization.

Most OD folks would find more comfort in Theory O, which is about developing organizational capabilities, encouraging bottoms up change, building a corporate culture around employees, motivating via commitment, and consultants who support management in making their own decisions.

Table 3. *Waves in Economic and Social Development*

	Daniel Bell Alvin Toffler	Pre-industrial First Wave	Industrial Second Wave	Post-Industrial Third Wave	Fred Nichols Matt Minahan
		Era 1	Era 2	Era 3	Era 4
<i>The Economy</i> ➤		Regional	National	Global	Networks
<i>Core Process</i> ➤		Barter	Commerce	Communications	Partnering
<i>Work</i> ➤		Extracting	Manufacturing	Thinking	Integrating
<i>Outputs</i> ➤		Raw Materials	Finished Goods	Innovations	Partnerships
<i>Key Ingredient</i> ➤		Labor	Capital	Knowledge	Trust
<i>Key Person</i> ➤		Farmer	Financier	Worker	Integrator
<i>Controlling Factor</i> ➤		Climate	Clock	Computer	Climate
<i>Locus of Conflict</i> ➤		Nature	Machinery	People	Nature

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The both/and between Theory E and Theory O, which is where solid OD folks actually do their work, explicitly embraces the tension between economic value and organizational capability, sets direction from the top *and* engages the people below, focuses simultaneously on the hard structures and systems *and* the softer corporate culture, uses incentives to reinforce change but not drive it, *and* works with consultants who are expert resources who empower people. That would make our work about both organizational effectiveness *AND* individual development.

**Dear Past: Thank You for All the Lessons.
Dear Future: We are Ready**

So, what is happening in the world that is worthy of our attention as a field? That is worthy of our talent? What opportunities will be missed if we just disappeared? What is the stake in the ground that we will stand and defend?

There are dozens of reasons in the real world to be pessimistic about our future. Climate change, income inequality, additional wealth depletion among people of

color since 2008, disappearing manufacturing jobs, gridlock in elected legislatures, the declining birth rate, international tensions and trade wars, rising nationalism, tariffs, threats of war, totalitarian tactics among leaders are among them.

Yet, aren't these the very problems that need our skills the most? Aren't these the greatest challenges of our time? Isn't this exactly what calls forth our very hearts?

"The modern OD movement, like its founders, must begin to engage with and be galvanized by the big questions of the day . . . convincing evidence for its impact, and indeed the impact of any approach to change, is patchy and inconsistent. Yet there has never been a time when the big questions were more important. The world is running out of natural resources and food, climate change is threatening to destroy the planet, and organizations in large and important sections of our economies seem to have decided that ethics, morality and laws do not apply to them" (Burnes, 2004; Burnes & Cooke, 2012).

If the research by Shull et al (2014) mentioned above is correct, then "helping

others" and "making the world a better place" is exactly what fires us up.

We have much to learn from those who think about the future. The jobs study by the World Economic Forum identifies "organization development specialist" among the top 10 new roles needed in the future (The Future of Jobs Report 2018, 2018). Many of those jobs will be needed in emerging economies and in places like Asia and Eastern Europe, which raises huge challenges for OD graduate schools and certificate programs which are largely located in the US and UK. But despite the challenge, the opportunity is there.

Many futurists are talking now about the Information Age as the fourth big wave in economic and social development. Schroyer (1974) and Toffler (1980) did some early thinking about the evolution of economies and societies. Longtime colleague and thinking partner Fred Nickols has extended their thinking in "Beyond Post-Industrial Society: A Fourth Era?" (See Table 3.) The very language in his future is all about the things that good, solid OD brings to the world: blending networks, partnering, integrating, trust, climate as a

controlling factor, and nature as the locus of future conflict.

In their review of 30 years of research in OD and change, Bill Passmore and Dick Woodman (2017) identify 5 major shifts in the world that should affect our practice of OD:

- » Motivation: from transitory needs being affected by immediate conditions and rewards, to not just one need but wanting it all (e.g., personal freedom) with little acceptance of positional authority.
- » Leadership: from the great-man leader, to nonhierarchical, informal, and shared leadership.
- » Teamwork: from small, face-to-face groups with a shared goal, to virtual, larger, and less stable memberships.
- » Organization design: from authority relationships with boxes and connecting arrows, to holocracy, team organizations, and network-centric.
- » Organization development: from planned change with steps and phases, to facing multiple, complex changes simultaneously with networks and nominal organizations, and optimizing action learning (Burke, 2018).

Are We Up to It? Are We Up to Us?

It certainly won't be easy to keep reaching for the stars *and* to get our feet on the ground. But just because we haven't doesn't mean we can't. Or won't. Or shouldn't. We have to look at what we believe about ourselves, what we believe about each other, what we believe about OD, and what we believe about the world to fully answer these questions.

So far, we have demonstrated little of what Gervase Bushe identifies as the criteria for creating a "great organization:"

1. The more developed a system, the more aware of itself it is; it can talk to itself about itself.
2. The more developed the system, the less is it driven by reactive, unconscious emotions, motivations, and cognitive frameworks and the more decisions and actions are based on reason, rationality, and cognitive complexity.

3. The more developed the system, the more it is able to actualize its potential (G. R. Bushe, 2017).

But just because we haven't yet, doesn't mean we can't. Or won't. Or shouldn't.

If We Were Consulting to Us:

What would we say to ourselves about this dilemma, and what would we advise ourselves about this?

First, get the whole system into the conversation. There are a variety of ways to do that today, including surveys, focus groups, online fora, conferences, meetings, teleconferences, etc. This process of creating the forest view is already in motion, also in a variety of ways.

One such process has been underway for 2 years. A few friends and colleagues have created a series of three annual face to face meetings called The Gathering, bringing together a diverse group of practitioners, students, scholars, activists and authors, to talk about the current state of the field and to help chart its future. We have been intentional about including leaders and members from the OD Network, Academy of Management, International Society of Organization and Change, and authors, thought leaders, and practitioners around the world. There is more at www.odgathering.com.

In preparation for the 2019 Gathering, there are four Circles at work now, on Values for the Future; Vision, Essence, and Critical Needs for the Future; Consolidating Definitions of OD; and OD Competencies. We hope that each Circle will have refined its work so that we can find enough consensus and common ground to bring them forward to the field in a broad consultative process that includes the many diverse voices in the field.

This may not be the best, and it certainly shouldn't be the only, efforts to build bridges across boundaries within the field, but it is underway, two-thirds completed, generating high quality conversations, building relationships, and getting work done.

We would be even better served if there were also a solid consensus about the research needed in the field. Six topics identified almost 20 years ago seem even more important now than they did 10 years ago: virtual teams, conflict resolution, work group effectiveness, social network analysis, trust, and intractable global, religious, and environmental conflict (Bunker, Alban, & Lewicki, 2004). But the OD doctoral programs are marginal in most universities. We do not have a cadre of full-time faculty who are conducting ongoing research on OD and its effectiveness. In most programs, a full-time director or two are consumed with recruitment of students and adjunct faculty and program administration; they are too busy and too few to conduct research or write. As a result, the research done by doctoral students in the field is very "pracademic" and, while useful, does not easily contribute to a larger, systemic body of knowledge.

But there are stirrings among the trees. In 2007 OD program directors started meeting as a small caucus at the Academy of Management and OD Network. By 2009, they created the **OD Education Association (ODEA)** (<https://www.odnetwork.org/general/custom.asp?page=ODEA>) and included all of their students and faculty as members. By 2010 they jointly created the **Essential Elements** (<https://www.odnetwork.org/page/EssentialElements>) for OD graduate school curricula, the 12 topics that are considered indispensable to the education of future OD practitioners (Minahan, 2014).

The OD Network has taken a huge step toward the forest view. It worked with dozens of volunteers, input from every major OD organization, and almost 900 respondents from around the world to create the **Global OD Practice Framework** (<https://www.odnetwork.org/page/globalframework>), a 5-part competency wheel. Some have criticized its business-oriented language as not being OD enough, but it is generating the hoped-for response of upping the ante on who we are and what we have to offer to our clients and the world (Minahan, 2018).

I had the good fortune in April of this year to tell the origin stories of the ODEA, the Essential Elements, and the Global OD

Practice Framework at a first-ever meeting of UK organizations teaching, training, and certifying OD practitioners. Convened by long-time colleague and friend Mee-Yan Cheung-Judge, these were graduate programs, certificate programs, private sector organizations with their own OD models, three large public sector agencies with thousands of OD folks, NTL Europe, the OD Network Europe, The Tavistock Institute, and a few scholars and researchers. Some knew each other, most didn't. Some were collaborators, most were competitors. And yet, within an hour of meeting each other for the first time, all shared their models and theories and frameworks, printed on posters of all to see and earnestly agreed that there was more to gain by working together than working alone. It was also gratifying to see that several are using the Global OD Practice Framework for the training and self-assessment of OD practitioners in the UK.

There are important glimpses of the forest. It's a good start. And there's more to do.

Second, get serious about the business of business. We need to get serious about it. Not enough OD consultants can tell you about the budget, revenue sources, or operating income in their client systems. Knowing how many people work in the unit is the primary metric that many of us use, but until we grasp the basic dynamics of the organization as a whole—growing, contracting, centralizing, decentralizing, employees, contractors, payroll, contingent, full time, part time, benefits, no benefits, individual incentives, group incentives, earnings before taxes, return to shareholders, engagement of stakeholders, relationship to the outside environment, boundary porous, boundary impermeable, etc. we limit our capacity to influence organizational leadership and to support them in the larger changes that really matter to them.

David Bradford addresses this in his 2006 video message (https://www.youtube.com/watch?feature=player_embedded&v=5AbB3VEy1BM). We need to know and understand the core business functions and income dynamics of the organization so

that we can strengthen the links and alignment among strategy, structure, and business operations.

There are tons of consulting firms that provide “solutions” to these business issues and improve organizational performance. Their strength is intervening in the *technical* system. BUT, if we knew more about the business and its key operational challenges, we could speak credibly to improving organizational performance AND individual development, intervening in the whole *socio-technical system*, by building capacity using high engagement methods. That is the both/and that we bring to the world and is what differentiates us from traditional consulting firms. But we need to get smarter about the business dynamics and speak the language of our clients, rather than trying to convert them to ours.

Third, get over ourselves. While there is a general pessimism about the future of the field among some in the US, we must admit that while our forest may be in decline in the US, there are branches, trees, and a whole ecosystem of OD that is springing up around the world.

In addition to the meeting of OD organizations in the UK, there are OD programs and institutes across Europe, including an OD Network Europe and a branch of NTL in Europe that continues to flourish and offer programs while its US based headquarters struggles to offer it labs. Longtime friend and OD colleague John Scherer has been working in Poland and writes that in central Europe, his firm is experiencing more demand than ever for OD/OE programs and their mini-certification program called The Leading Change course (J. Scherer, personal communication, April 20, 2019).

There are at least half a dozen schools, consultants, and entrepreneurs starting up OD training programs in China (Minahan, 2019). There are several in Japan. There are OD graduate programs in the Philippines, Thailand, Mexico, and elsewhere. The Asia OD Network has been expanding across the region for a decade now.

We also have to acknowledge that “Organization development practitioners are no longer the sole proprietors of

organization development knowledge. Having more educated clients is a very good thing. Supporting them to increase their levels of OD capability requires us as OD practitioners to think about how we need to expand our value proposition” (Sanchez, 2013). This forces us to consider that building capacity is a key element of the work that are doing in organizations and making it explicit in our contracting and marketing conversations.

Fourth, get serious about impact evaluation. We need to evaluate and speak to the economic and financial impact of our work better than we have in the past. Every self-respecting consulting firm can tell a client what a project will cost, and what it will save. The language of business and organizations is the language of results: metrics and proof.

This is the result of our inability to speak about results: “Many organizations stopped saying they did OD because the label (and maybe the entire field) had become a cliché. Furthermore, a lot of OD groups in organizations hadn't produced a hell of a lot of useful, lasting change that people could point to” (Porras & Bradford, 2004).

Sure, there are many outcomes from our work that can't be monetized. How do you put a dollar value on an improved organizational climate? Or who has influence in the system and how they earned it, and who is being marginalized in the system and what is causing that? But we shouldn't be selling just improved organizational climate or tuned-up teams or more effective executives.

Our work should also include examination of the organization's meeting patterns, how leadership spends its time, who makes decisions and how long it takes to make them, the basics of the unit's business process, how and where things get stuck, how incentives work or don't . . . all of which can be measured, which means they can be monetized, which means we should be working toward them, which means we should be speaking with our clients about them, before, during, and after our projects.

We should be able to make a fact-based argument for the value of our work. Our tool box of ice breakers and two-by-two matrices is not enough. Our work needs to withstand the same cost-benefit analysis that any organizational investment receives.

We need much better tools and methods for evaluating the impact of our work and making the case for ourselves and our field. Research done on the Socio-Economic Approach to Management (SEAM) among 1300 organizations at ISEOR, the Socio-Economic Institute of Firms and

We should be able to make a fact-based argument for the value of our work. Our tool box of ice breakers and two-by-two matrices is not enough. Our work needs to withstand the same cost-benefit analysis that any organizational investment receives. We need much better tools and methods for evaluating the impact of our work and making the case for ourselves and our field.

Organizations affiliated with the school of management of Lyon, France, points to three variables: a cyclical improvement process, permanent management tools, and periodic political and strategic decisions for returning the full investment of an intervention in as few as three months, an average of 12 months, and many multiples when pursued over time. Their underlying belief is that the principles of Frederick Taylor, Henri Fayol, and Max Weber are a destructive virus that infects organizations (Conbere, Heorhiadi, & Cristallini, 2012).

Further, “OD should never be on the receiving end of the ROI question. We should be the ones asking it. We should initiate the conversation on this subject. And we should initiate it at the outset, when the program is being considered. Moving from the ROI approach to the Inquiry Approach requires OD practitioners to think like leaders, ask challenging questions, and make decisions in the face of uncertainty. It requires us to look at how our program (or any program) fits with the strategy of the business” (Kruse, 2010).

We need to be willing to work on change that is pragmatic and sometimes directive and top down, not just principled, collaborative, and bottom up. We need to acknowledge that power is a necessary component of organizational life, and we need to align ourselves with the priorities and values of the CEO and leadership. And, if we cannot, we should walk away from the work.

Fifth, radically change our thinking about OD and HR. While we’ve been focused on our own trees, we haven’t noticed that a

new species is now in our forest, the HR profession. As HR has grown and matured as a discipline, it has realized that OD is what HR wants to become. In just about every HR competency framework, OD skills are at the top of a ladder that generally begin with HR generalist. In between are jobs such as HR officer or business partner. There are some jobs around career development, recruitment, talent management, and leadership development.

Of course, these jobs are all well filled by candidates with a background in OD. But that does not make them OD jobs. The systems view that we bring to the world, coupled with our commitment to *organizational performance* and *individual development*, makes OD people great candidates for these jobs. But in the end, there are not really OD jobs. They are a well-traveled route to OD jobs, but they are not OD jobs.

Even in the cases where the HR function does create a real OD job, it is too often undermined by its very location on the organization chart. Even though there are some strong and effectively-led HR organizations, overall the HR function is

often the least well-regarded function in the organization.

Even deeper, though, is that the fundamental purpose of the OD function is in conflict with that of HR. The core mission of HR is to provide staff, reduce labor costs to the lowest possible level at which people will work, reduce risks, and avoid litigation. In that kind of environment, it is almost impossible to serve the core mission of OD, which is improve the effectiveness of the organization, maximize the potential of human beings and their contributions to the organization, align strategy to structure to business processes to behavior in an effective corporate culture, take responsible risks, and model humanistic values in the workplace (M. Minahan, 2010).

Sixth, radically change our language. To be fluent in the business operations of organizations we need to understand the concepts and vocabulary of business management in organizations. We need to speak its operational language of growth, downsizing, opportunity, risk, cyclical and counter-cyclical dynamics, not just the humanistic language of participation, collaboration, and empowerment.

Even in our earliest years, there were some who got this right. Speaking of Dick Beckhard and the principals of Block, Petrella, and Weisbord, Harvey Hornstein said, “They were *acceptable* (sic) and got in the door with executives because they spoke, and could identify with, business as well as larger human purpose. They were not ‘beads and sandals’ guys” (Goldberg, 2019).

Really good internal OD practitioners know this very well. They have figured out that they have to defend the organization’s investment in them on a regular basis. They can tell you things about the system and how it operates that no one else can. Their background and training in systems dynamics helps them see the forest better than the tree people in their own organizations. In this regard, internal exemplars have already figured out how to reach for the stars AND keep their feet on the ground at the same time.

A shift in our own language would help as well. We externals say we have a

consulting “practice,” which resonates with the non-commercial elements of a doctor’s or lawyer’s office. It also has connotations of the doctor-patient relationships and diagnoses. If we changed our language to consulting “business,” and thought of ourselves and our work with a bottom-line orientation, we might be able to more easily relate to the bottom-line orientation of our clients. A shift in these directions would help us expand our reach and our impact into the fullest range of public and private sector entities, and help get us off the postage stamp we have created for ourselves, bounded by values and principles and shoulds and should nots and wills and would nots and our own chosen blind spots.

International OD consultants already get this shift. In interviews and surveys with global OD consultants, business concerns were the top 5 rankings of the current state, and the top 8 rankings of the future state, including enhanced productivity, bottom line results, and profitability, increasing efficiency or effectiveness, enhancing competitive advantage, and promoting quality of products and services. “For the global OD consultant, the concern for business effectiveness is . . . both/and, not an either/or (Yaeger, 2002, p.17).

Seventh, take ourselves as seriously as we want our clients to take us. In our commitment to be nonjudgmental and to have a big tent and to promote diversity, we have not demanded enough rigor in the field. I have heard dozens of people say, “Yes, I used to work in the line, but this OD job is better.” When I ask how they learned OD, too often there are no answers. I’d love to hear, “I’m working on a Masters degree,” or “I’m working on the NTL OD Certificate,” or “I’m in an action set,” or “I’m understudying our external consultant.” Instead, I get blank stares or “I Googled it.”

Change management, coaching, project management, HR, training all have competency models and organizations that certify. Yet we in OD in the US are late to the table. We have much to learn from our colleagues in the UK, where certifying bodies themselves are certified, and those credentials are taken as seriously in the field

of OD and they are in every other profession. We have much to learn from the modern organizations such as SHRM, ACMP, ICF, and other associations that have formed around our field.

So, while people of the stars were gazing inward, the people of the ground were building organizations, competency models, and certification programs that meet the needs of their members. And we were not.

I remember hearing from HR VPs in a focus group at the OD Network conference in 2005 that what they really wanted

. . . retire “organization development.” Like a well-worn car or pair of shoes, we’ve become very attached to this label. It warms our hearts. . . . But other than to us, those two words mean nothing in the real world. We have no currency with anyone except ourselves. We laugh when asked how we explain our work to our parents and friends. It’s a bit of humor for us. It is our inside joke. But it is also an embarrassment that we have no way to describe succinctly what we bring to the world and what we have to offer to organizations.

from the OD Network was to know which of their HR people were good enough to be trusted alone with a line VP. They wanted the Network to certify their people.

When explored with the OD Network’s boards of 2005–2010, the answers were, “We don’t do that.” “We want to be accepting of all people.” “These criteria would exclude even Edie Seashore, we can’t do that.” “That wouldn’t be inclusive.” “That would create inequities in our own system.” “There would be haves and have nots.” The idea died for a decade.

We are watching the Teslas of our world—ACMP, SHRM, ICF—intrude on our space while we cling to the Prius that we’ve known and loved for all of these years, pretending not to notice that sales are declining (in 2017 less than half of 2012), sales of electric vehicles are rapidly increasing, and prices for used hybrids are falling. There similar signals from the market about our own field we ignore at our own peril.

Finally, retire “organization development.” Like a well-worn car or pair of shoes, we’ve become very attached to this label. It warms our hearts. It calls forth echoes of Kurt Lewin and Marv Weisbord and Ed Schein and Edie Seashore and Leland Bradford and Billie Alban and Bethel Maine and Herb Shepard and all the great women and men upon whose shoulders we stand.

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of humor for us. It is our inside joke. But it is also an embarrassment that we have no way to describe succinctly what we bring to the world and what we have to offer to organizations.

Jerry Porras got here 15 years ago. “The term OD became irrelevant to me . . . OD is everything and as a result OD is nothing . . . it became whatever OD consultants were doing. So, organization effectiveness became the *in* terms. It then evolved to organizational transformation, then organizational learning and so on” (Porras & Bradford, 2004, p. 395). Porras goes on to say that “. . . OD has become an out-of-date fad in the minds of many managers. We might be better off just abandoning the term OD. What we’re all interested in doing is helping organizations to change, to become more effective along a wide variety of dimensions. Let’s focus on that” (Bradford & Burke, 2005, p. 63).

Not only does the term have no currency in the real world, whatever currency

it ever had has eroded in the face of coaching, project management, change management, diversity and inclusion work. In that regard, these patches of forest are growing different trees and creating different forests.

Our clients already know this and are taking action on it. There are very few OD departments anymore. The few that survive are mainly called organizational effectiveness, or organizational performance, or performance improvement, or something related. One client organization recently abolished its OD function, moved it into the Office of the President, recommissioned it to a broader role, increased its budget and staffing commensurately, and renamed it “Change, Delivery, and Innovation.” When you think about it, that means much more to that organization than does “OD.”

What if we declared success? Accepted the fact there are no boundaries to our field. That these other disciplines have hollowed out the core of our work, leaving not much of a forest, and only individual trees? What if we accepted that the wonderful history and legacy left to us by our founders just isn't relevant in today's world?

What would we be without our name? Would we have to shift our identity the way the training organization shifted from ASTD to ATD to reflect their new direction? The way that AT&T became seven regional phone companies under different names, and then re-consolidated as Verizon. And then expanded itself to take on an entirely new wireless business. As the new and revitalized AT&T did and then recreated itself into a cable company, and then a content delivery and distribution system with the purchase of Direct TV. Or Disney's acquisition of the Fox movie studios? Or the pending sale of their regional sports networks to Sinclair?

If Not OD, Then What?

In a wonderful phone call with long time friend and colleague and former executive director of the OD Network, Peter Norlin and I pushed around a variety of terms in different combinations. It was a kind of Mad Libs, for anyone who remembers

Steve Allen. In the end, Peter put together the two words that stopped the phone call in its tracks. **Strategic Change.** Like OD, both words mean something individually. But together they have much more meaning than organization and development together.

Everyone knows what a strategy is. Everyone strives to be more strategic. Everyone realizes that requires work. The words strategy and strategic have more meaning and currency today than at any time in the history of organizations. The word also evokes a bigger scale, a farther horizon, a larger context to the work that we do and the change that we want to support. It connotes a strong connection to the organization's, and our, larger purpose.

Likewise, everyone knows what change means. It is swirling around every facet of our lives. We have to acknowledge that our field has no Immunity to Change (Lahey & Kegan, 2009). We don't have the privilege to exempt ourselves from the very imperatives of evolution and outside environment that govern life in every living and organizational system. In fact, helping them cope with this very imperative is why they hire us.

To Do List:

If we are serious about undertaking these changes, things to do include:

- » Look for more ways to engage ourselves and each other in the ongoing dialogue about the future of the field.
- » Revisit the values upon which the field is based. So much about the world is different than it was 70 years ago that a thorough examination and possible reboot of what we have cherished as our OD values is in order.
- » Educate ourselves in the language and business dynamics of organizations. That means online courses, community college courses, workshops, seminars, concurrent sessions at conferences.
- » Align with people and organizations who know how to count things and measure impact and return on investment. The **International Society for Performance Improvement (ISPI)** (<https://www.ispi.org/>) is a good place to start.

The International Program for Development Evaluation Training (<https://ipdet.org/>) is a good place to learn. Take their training programs, go to their conferences. Invite them to come to your conference. As it happens, they need our systems view of the world just as much as we need their evaluation view of the world.

- » Study business dynamics. This does not require an MBA, but it does require a bit of effort to learn the language of leadership and organizational dynamics and how to read a financial statement.
- » Reach out to the change management, project management, and training organizations to build alliances.
- » Change our questions from “why are there no OD jobs anymore” to “how can we advocate for what the world really needs, a strategic approach to change.”
- » Adopt the language of today's world and accept that Strategic Change is what we're all about.

These will help us get to the both/and where we can still hug our trees AND see the forest view. They will also help us reach for the stars and get our feet solidly on the ground. They will help us deliver *organizational performance* AND *individual development* well into the future in a world desperately in need of both.

Author's note: This article draws heavily on previously published Minahan, M., & Norlin, P. (2013). Edging toward the center: An opportunity to align our values, our practices, and the purpose of our work. *OD Practitioner*, 45(4), 2–8.

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Matt Minahan, Ed.D., is president of MM & Associates, an international consulting firm specializing in strategy, structure, organization design, and culture change. He teaches in the MSOD program at American University and is a guest lecturer at Benedictine University, Cabrini University, and other doctoral programs. He served on the Board of Trustees of the OD Network from 2009 until 2015, and was vice-, co-, and chair of the board from 2012–2015. He is a longtime member, and former board member and T-group dean at NTL Institute. He can be reached at matt@minahangroup.com.

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“First, a bravo to Minahan for being brave enough and audacious enough to put what is nothing less than a comprehensive manifesto in front of us. ... However, the specifics don’t matter to me as much as appreciating someone who encapsulates a very broad range of critiques and concerns about OD as a field and then challenges the OD community to respond.

Responses to Matt Minahan’s Call for Strategic Change

Respondents:

Robert J. Marshak
David Coghlan
Rebecca Slocum
Gervase R. Bushe
David W. Jamieson
John Conbere & Alla Heorhiadi
Yabome Gilpin-Jackson
Peter F. Norlin
L Mee-Yan Cheung Judge

RESPONSE

The Minahan Manifesto

By Robert J. Marshak

I have several different thoughts and reactions to what Matt Minahan has offered to the OD community. I don’t think they reflect a consistent theme as much as reflections from differing perspectives that I hold. I offer them as a contribution and perhaps further stimulus to the dialogue and action agenda Matt is inviting.

A manifesto nailed on the door of the OD community. First, a bravo to Minahan for being brave enough and audacious enough to put what is nothing less than a comprehensive manifesto in front of us. I agree with much of what he has written and also differ with some of it (see for example, Jamieson & Marshak, 2018). However, the specifics don’t matter to me as much as appreciating someone who encapsulates a very broad range of critiques and concerns about OD as a field and then challenges the OD community to respond.

We have met the enemy and they are us. Borrowing from the great sage Pogo we are invited to look in the mirror and recognize some of our foibles and failings as a professional community. Given the intended audience I also wonder if somewhere, somehow including what the community has done well—our virtues and contributions—could have been introduced to balance the presentation a little bit and also remind us that we have abilities and

resilience to deal with the issues Matt enumerates. At the extreme, after reading all the inadequacies of OD practitioners one is left wondering a bit if a wake-up call has much hope of success. A brief discussion or reminder of what we as individuals and a community are capable of might provide more encouragement.

The news of our death is greatly exaggerated. I am not Mark Twain but the demise of OD unless it addresses many of the identical issues raised by Minahan has been predicted for decades. For example, thirty years ago Michael Beer wrote in this journal, “In my view the field of OD is dying” and “OD is in need of redefinition” (Beer, 1989, pp. 11-12). Yet somehow OD lives on. How can that be? My answer paradoxically accepts both life and death. I am increasingly of the mind that OD as it was originally practiced in the 1950s-1970s has largely atrophied or “died” except in the memories of old timers and gatekeepers like me. At the same time newer ideas and practices have flourished including approaches that many of us might consider OD, but whose adherents know as something else and may never have even heard of OD. So, OD is dead. Long live OD.

A rose by any other name. I’ve been a practitioner of OD for 45 years now. For at least the past 40 years there have been calls to change the name from “OD” to something else. I recall “organization effectiveness” was in vogue right after I started as an internal. Then, and perhaps now, the desire was to get away from the stigma

of the “touchy-feely” human potential, T-Group, and team building origins of the field. The name “organization development” still carries that stigma for some and for others it’s an important name badge for a humanistic values-based profession. Substituting another name without significantly changing the underlying values and practices will eventually lead to the new name being stigmatized in the same ways as the old and for the same reasons. As they say in some circles, it would be like putting lipstick on a pig. Of course, another road to travel down would be to openly own that OD is centrally concerned with optimistic, humanistic, democratic, people-centred approaches even if the underlying assumptions, values, and methods may be marginalized in different settings and at different times. Why own a set of values and approaches sometimes marginalized by some potential clients? Because those values and approaches are always important for the human condition even if not always embraced.

Strategic change. I need to go on record as co-authoring with Gervase Bushe

a recent book chapter arguing that positioning OD as focused on dealing with change leads to difficulties and that a better positioning would be that OD creates great organizations (Bushe & Marshak, 2018). For me, there may be problems with the name organization development, but I am not persuaded “strategic change” works better unless what are now considered to be some of the core elements of the field are dramatically changed. And, while perhaps sounding more appealing to for-profit corporations and business schools, I am not sure the “strategic change” name would have the same appeal to government agencies, not-for-profits, spiritual organizations, volunteer organizations, and so on. I am also reminded of a time when participants in a workshop I was leading initially thought the jargon term “change management” meant “change the management.” Surely someone(s) will think “strategic change” means “change the strategy.”

Let me now end this brief set of reflections with the hope that my comments do not detract from the importance of Minahan’s observations and challenges, but

instead provide some additional considerations and nuances to the reflections and conversations we need to have as an OD community.

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Robert J. Marshak, an OD practitioner and educator for more than 40 years, is a recipient of the OD Network’s Lifetime Achievement Award.

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Another Tree to Hug: Contemporary OD Action Research

By David Coghlan

Matt Minahan comments that “there is little, or no research being done in OD.” In the context of his critique of contemporary OD I want to add my tree to hug, namely OD action research (Shani & Coghlan, 2014). OD has a dual identity; it is a science of change and the practice of changing. At the heart of this dual identity in our OD heritage is action research, which is understood as addressing the twin tasks of bringing about change in organizations and in generating robust, actionable knowledge.

While action research is one of the distinctive features of OD and one of its core origins and is powerful for practice, the original intention for scholarly contribution got lost. Action research typically has found itself excluded from the forum of organizational scholarly research, especially in the Anglo-Saxon academy, led by the United States. This is due to the dominance of the positivist approach to research in the academy and the denigration of forms of research that incorporate action as smacking of subjectivism. The perspective that action research is not ‘scientific’ perpetuates in some circles, although, as

it is well argued, its methods are far more scientific in the sense of generating knowledge that is tested in action and in mobilizing relevant knowledge from people in a position to know their conditions better than conventional research can. The key insight is that action research constitutes a kind of science with a different theory of knowledge that produces knowledge that is contingent on the particular situation and which develops the capacity of members of organizations to solve their own problems. In using the term, ‘scientific,’ it is argued, there is a need to move away from adopting frameworks from natural sciences in order to engage with the world of practice.

Action research used in organization development is mostly based on collaboration between an OD researcher and a client where they collaborate on intervening in the organization to address a relevant issue and in cogenerating actionable on the experience in terms of quality criteria of being rigorous, reflective and relevant (Coghlan & Shani, 2014). Through its Lewinian roots in the scholarship of practice, OD has the capacity to bridge the rigor–relevance, theory–practice debates that beset contemporary organization studies. Accordingly, action research is not only a methodology and a set of tools but is also a theory of social science.

There are rich action research studies being published in outlets such as: *The Journal Applied Behavioral Science* and the research volumes, *Research in Organizational Change and Development* (Emerald).

In recent years action research into core business challenges such as collaboration in the supply chain, the merger of two organizations and innovation, to take three examples, demonstrate the reemergence of OD research as a collaborative activity. In a broader context action research on the challenges of global warming and sustainability are common. Such studies may not explicitly use the term organization development, but they exemplify the core values of action research that is undertaken in a spirit of collaboration and co-inquiry, whereby the research is constructed with people, rather than on or for them. The OD heritage of such action research is foundational.

As my tree to hug, I hope that this short note stimulates OD scholar-practitioners to retrieve action research as OD research and to create knowledge that is useful for practice and robust for scholars.

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David Coghlan, Trinity Business School,
University of Dublin, Trinity College Dublin,
Ireland

The key insight is that action research constitutes a kind of science with a different theory of knowledge that produces knowledge that is contingent on the particular situation and which develops the capacity of members of organizations to solve their own problems.

In Practice: A Reflection on OD Abolished

By Rebecca Slocum

Upon reading Minahan's article, I can't help but think about my recent experience consulting to a small international agency. One of my first tasks within the organization was to conduct a functional analysis of its OD function, a small team in the budget office in charge of strategic workforce planning and position management.

Yes, a team in the budget office in charge of strategic workforce planning and position management.

If not evidenced by that sentence, one of my primary findings was that OD as a function was poorly understood and had been given work mostly associated with budget and HR. Meanwhile, the typical work us OD folk associate with our field (change work, org design, leadership alignment, etc.) was occurring through the executive office or via Senior Management's appointed change team (though none of this was associated with the term "OD").

At the end of my analysis, I recommended to either re-brand the OD function

by re-purposing it to do true OD work, or stop trying to fit a round peg in a square hole and abolish OD altogether. I am simplifying the scope, substance, and context of my analysis greatly, but to make a point.

Although my little analysis was read by a few, it was mostly forgotten as we were all swept up in a massive system-wide, top-down reform sweeping through the organization. Hungry for change and process skills, the reform seconded me away from my OD home and I found myself on the change taskforce.

Six months later, as part of many broader structural changes, the OD function was indeed abolished. The academic in me felt sad, but the practitioner in me knew OD was being abolished in name only. Case in point: the same memo that killed OD and divided its remains between HR and budget also created a new change function reporting directly to Senior Management. The head of the unit was the former taskforce leader, an individual with over twenty years of brass-tax, bottom-line, feet-on-the-ground political savvy and budget experience. One of his first hires as a consultant? Me.

I have changed greatly as a practitioner through my experience working in this organization. I have seen first-hand as its budget office tried to diagnose an ailing

OD. I was pulled into a world of executive-led, aggressive, top-down change. And now I am employed by a change leader, whose strict no "fairy dust" and "watch the numbers" approach sometimes makes me want to throw a flipchart marker. But, I have learned critical skills I did not have as a newly minted practitioner: an understanding of budget, fluency with workforce and data analytics, and the ability to understand and tolerate the most frustrating of internal politics.

These things make me a better practitioner and of more use to my client. And though I know I will always be doing OD and living by the values our field espouses (I clamour for participation and process until I'm blue in the face), I no longer introduce myself as an OD consultant. Depending on my mood and the venue, I am a change consultant, a change strategist, or a process facilitator. I'm still figuring it out. But as long as I do good work, no one outside the field seems to notice I've dropped the OD.

Rebecca Slocum is an independent consultant who works primarily with international organizations and development agencies. She can be reached at rebecca.slocum@gmail.com.

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Will Strategic Change Better Position Organization Development?

By Gervase R. Bushe

There is a lot I agree with in Minahan's article.

In addition to the loss of OD scholarship, the OD brand is poorly defined and has lost much of its potency in the US, even as OD as a brand, is ascendant in other parts of the world. Without some kind of certification standards and processes, that may be difficult to change. But we are faced with the big problem that certification standards, in any profession, mainly rely on developing a set of skills and competencies. OD, on the other hand, also depends on the psychological development of the person. In the language becoming popular in leadership development circles, it's about vertical (psychological) development as well as horizontal (skills and knowledge) development. Around 1990 I administered Loewinger's Ego Development test (the gold standard in measuring vertical development) to thirty-seven OD consultants who were members of Certified Consultant's International (an attempt to certify OD consultants led by Herb Shepard that folded around 1990). While in the normal population somewhere between 5 and 20 percent of US adults scored at post-conventional (higher) stages of ego development, over 70% of that group of OD practitioners did. We don't have models for how to develop people vertically or examples of how to certify it. We can measure it though—there's a thought. Maybe we should start with requiring a certain level of vertical development for certification, or inclusion in graduate programs in OD.

Higher levels of vertical development would certainly fit with my experience of who thinks of themselves as OD. Around the world I have met hundreds of people who are "OD". We almost instantly

recognize each other as being of the same tribe. Being in a job with an OD label does not guarantee they are part of the tribe. Those in the tribe remind me of the people who mentored me into this field, and the people I've met who created the field. They are like the people who are part of my HSDP group—a Northwest remnant of what was once Certified Consultants International. They are like the people I went to school with at Case, like those I meet when I go to an NTL gathering, or a gathering at Ashridge or Roffey Park in the UK, or INOC in Germany, or CSHR in Japan. Sometimes they identify with the OD label and sometimes they don't but they are the people I'd certify if I had the magic wand.

What is similar about these people?

1. They are all deeply engaged in personal development. They believe that being able to help develop others, teams, and organizations requires first working on themselves, deep self-awareness, being self-reflexive in their interactions with others, able to retain a strong sense of self in the midst of other's anxieties and transference. They have a good sense of unconscious processes, in themselves and others. They notice paradox and polarity and don't reduce it to conflict and "either/or". They have healthy psychological boundaries.
2. They appreciate and are quick to engage in deep and authentic personal disclosure. They prefer to work with others they can develop strong relationships with that go beyond the transactional to the personal. They believe in the power of awareness, and that the best way to improve relationships, teams and organizations is to get people to talk to themselves about themselves.
3. They are fascinated by, and usually conversant with, a wide variety of theoretical and practical aspects of human interaction. This includes theory and research on being human, relationships between people, group processes, inter-group processes, organizational processes and design. And they are knowledgeable about and work with a variety of change processes. Working

with multiple lens at multiple levels of analysis may be one of the problems with OD being able to define itself, of "being about everything and therefore nothing". But it is also one of the greatest strengths of this tribe of practitioners and a key value-add they bring to any project.

It's difficult to imagine such a list of attributes being used as certification criteria. What is common about what they do, is that they engage people who have to change, in inquiry of some sort that leads to improvement. Which is how I define OD and differentiate it from other change and organizational effectiveness processes. Our interest in improvement is why OD people constantly incorporate new ideas and processes they can use to engage the people who will have to change in some kind of inquiry that will lead to improvement. This constant ferment and innovation in practice (even if it doesn't show up in OD textbooks) is one of the gifts of not having rigid certification standards, and one of the paradoxes a good certification regimen will have to manage.

Where I part company with Matt is in his suggestion that we toss OD and create a new label for our field of "strategic change". On the one hand, I agree that strategic change is ambiguous enough to encompass a lot of different facets of OD, and it's appealing from a business point of view. But trying to be appealing is part of what I think got us into this problem in the first place. I have written about how I think the field got hi-jacked when it hitched itself to "change" because at the time that seemed appealing. It led others to think we were about change management—which we definitely are not. The tribe I call OD is interested in development, a specific kind of change that has, at least, the three qualities Matt quotes me as describing a good organization. I use the three qualities of increasing levels of self-awareness, more driven by reason than emotion, and increased capacity to actualize potential, as markers of development, outcomes of good OD, and criteria for more developed

organizations. ODers aren't interested in change per se; we want to create great teams and organizations. The label "strategic change" could be applied to the intent to create great teams and organizations, but in the popular mind I doubt it will. More likely it will be seen as aligning with strategy—figuring out what is going on outside (and sometimes inside) the organization and planning how to succeed in the midst of that. If we simply change being confused with change management, for being confused with strategy, I don't think we will have progressed too much.

I agree with Matt about the need to let go of some of the past and move on. I recognize the appeal of re-branding; it can feel

like a fresh start. But I have two reasons to suggest we stick with organization development. One, and the most important, is that we have seventy years of embedded wisdom and practice called OD. Potentially we would be accelerating how quickly that would get lost if we abandoned the OD label. Recent compilations like NTL's *Handbook of OD*, or Wiley's *Practicing OD*, are filled with great stuff. The big problem is that much of that wisdom is unknown outside the field. Take for example Google's recent study on what makes a great team. It's getting a lot of attention in business circles by people who are unaware that OD knew all about this in 1975. And this points to the second reason: because so few

people have any idea what OD is, it doesn't need a re-branding. I don't believe there is so much of an already embedded bias against OD that we need to call it something else. Maybe that was true 20 years ago but when I enter a new client system and say what I do is OD, what I get is curiosity. I can define it any way I want and no one disagrees. If some group wanted to put the effort into making OD a "thing," I don't think it would be much different from making "strategic change" a thing.

Gervase R. Bushe is Professor of Leadership and Organization Development, Beedie School of Business, Simon Fraser University. www.gervasebushe.ca

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By Any Other Name...

By David W. Jamieson

My respected friend Matt Minahan has written a very powerful article on the state of the OD field and made strong cases for the mess we have created and for how it's time to stand up for who we are and what we can do. I am clearly on board for all of that, but not sure changing the name will help. A major aspect of our slow unraveling comes from how poorly we described what we can do and what value it has, how distant we keep ourselves from integrating with leaders in business, and I think internally allowing damn near everything to be labeled OD! We also rarely sold our field well in terms of what value it added to organizations in terms of measures other people cared about, like results.

I think many of us know that when OD is done well, the organization performs better and the people are more satisfied and engaged. Yet, most of our work had no evaluations and most of our messaging lacked value-add information. So we ended up in many places working at the margins on less than strategic endeavors. But I blame most of this on not getting our

internal act together and being clear what we did that was unique and different from what most did when they tried to change organizations. Our essence got lost! What set us apart was overshadowed by the shine of various techniques or the trumpet of popular trends. And, too often, to get work, we would undermine values we knew can make a difference in order to please someone's speed or command dictates. If we had only and could only now spell out how OD works differently, why and how and teach that to managers on their way up and embed it in leadership development and attach it to other fields that also help organizations to improve (PM, CM, Six Sigma, etc.).

We also never really had any form of governance that any of us would listen to. We set few boundaries, standards, criteria or anything that would help create an identity that could be understood. In some ways we were too independent, too inclusive and too unsure if we could have boundaries or standards that excluded some and set a higher bar?

Matt has gathered all the reasons and all the errors along the way. We will need real clarity going forward whatever we call ourselves. Any more vague, ancillary or nice-to-do actions will not rise to the top.

Our work used to be directly related to the organization and its people who make it function and how effective it ran, produced results and made a healthy workplace. How it was designed, how people were prepared for the work, how well decisions were made by the right people, how quickly adaptations could be made and what values guided everyday operations and interactions. That's where we need to be again, starting with key strategic conversations that drive much of what is needed today in our VUCA world. Yes, we should be about Strategic Change and sitting next to smart leaders facing unknown challenges, exactly when we need more engaged resources involved in determining and executing what's next. And short-cycle processes that accelerate learning and action-taking as the nature of the complex systems emerge. The core principles of OD are made for today if we just focus on the essence and design for what is present.

No more 5- step instructions, one size fits all, or hammers looking for nails. There is a better way!

*David W. Jamieson, PhD, President,
Jamieson Consulting Group, Inc.*

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A Socio-Economic Approach to Management

By John Conbere & Alla Heorhiadi

We appreciated Matt Minahan's essay on the current state of OD, and for the most part we agree with him. We would like to add a few ideas to the discussion from the perspective of the Socio-Economic Approach to Management (SEAM).

Very briefly (since one can earn a PhD in SEAM at the University of Lyon in France), in 1973 Henri Savall took the results of his two doctoral dissertations and created SEAM which is both a philosophy of management and an intervention process which drew heavily from the founders of OD. He created theory, and over 2000 case studies have validated the theory, in the manner of Robert Yin's positivistic case study (*Case study research: Designs and methods*, Thousand Oaks, CA, Sage Publications, 2003). The research continues, and it appears likely that SEAM is the most researched OD approach in the world. We disagree with Matt that "there is little to no research being done in OD." It is being done in France.

Savall describes socio-economic as two sides of a coin, each different but inseparable from the other. Socio refers to the need to attend to the people needs of an organization. Economic refers to the financial needs. His point is that OD done without attending to both faces of the coin will fail. Matt describes well the failure of many OD efforts because of the lack of attention to the economic needs of the organization. We also know from experience that when people's needs are ignored, it is difficult to create positive and sustainable change.

In this way SEAM could be a poster child for the future of OD. We are not saying that SEAM is the only way. We are saying that SEAM is a well-researched model for organizational and strategic change that deserves attention.

Minahan described the need for Theory E and Theory O to create sustainable change. Both are present in SEAM. The intervention begins with top leaders, and then cascades through the organization department by department. Leaders shape organizational strategy. Employees at all levels identify what is not working well and create processes that work. Top down and bottom up.

After decades of work, Savall and his colleagues reflected on the cause of most dysfunctions. They created a metaphor for the modern mental model of management, the TFW virus (named for Taylor, Fayol, and Weber). The "virus" is the cause of most dysfunctions. Therefore, to create healthier organizations, managers need to change their mental model of management to something that embraces the combination of Theories E and O. We add this thought to Minahan's essay: to succeed in OD, or strategic change, the mental model of many managers has to transform. Thus, one of the primary tasks of the strategic change practitioner is changing the beliefs of top managers about management. Without changing beliefs an intervention is likely to fail, or to be irrelevant.

One of SEAM's differences from most OD is its philosophical tenet that the only way to create positive sustainable change that will increase an organization's bottom line is by developing the human potential of its employees. This is the socio-economic link. Value is not increased by structural changes, firing people, increasing technology. Value grows when workers' ability grows. At the same time developing employees costs money. In SEAM the

development is financed through reducing the hidden costs which drain the organization's resources. This works because the average cost of dysfunctions is over \$20,000 per employee per year. That figure is the result of decades of research. Our SEAM work in the US confirms the cost per employee per year.

There is in SEAM a working model for assessing the financial value of an intervention. In a SEAM intervention the consultants assess the dysfunctions in an organization, calculate the cost of the dysfunctions, and then measure the change in the cost of dysfunctions on a yearly basis. Leaders can get ROI figures annually.

Finally, we would add to the essay the need for OD/strategic change practitioners to address the issue of greed. We suspect many might agree with us, but we do not see greed spelled out as an issue that OD needs to address. In the last year CEO pay rose "almost twice the rate of ordinary workers." (Eavis, *New York Times*, May 24, 2019). The median CEO pay is \$18.6 million. Some CEOs make 1000 times as much as employees at the bottom of the hierarchy. Some received huge golden parachutes after they failed to lead their companies to financial profitability. When employees are fired and the CEO gets a huge raise, how can we expect employees to be positive? Greed at the top probably is not a task that most practitioners want to take on. At the same time greed has to be addressed if we want healthy organizations. Perhaps this is an area in which research is needed. We suggest that corporate greed should be part of our collective strategic change agenda.

John Conbere, MDiv, EdD & Alla Heorhiadi, PhD, EdD.

SEAM Institute www.seaminstitute.org

We are not saying that SEAM is the only way. We are saying that SEAM is a well-researched model for organizational and strategic change that deserves attention.

Evolving Systems Do Not Wait for Stuck Humans

By Yabome Gilpin-Jackson

I agree with Minahan's assessment of the state of our field and in particular that we seem to be stuck in the same back to the future loop in this conversation. It was my similar attempt to shine a different light on the conversation that had me reflect and write the *ODP* article "It's Time to Make Organization Development Our Client" just last year. In that article, I examined our competing commitments to our own progress. I also call for amplifying our unique value proposition as well as working at the full scope of our practice as Matt surmises. I likewise believe we can be both unapologetically humanistic AND relentless about demonstrating business and organizational impact. I proposed that we

1. Claim our unique value and space of supporting development in organizations and practicing OD
2. Expand OD practice domain to work at full espoused scope.
3. Return to the values-base of our field.
4. Build and share portfolios of cases and research.
5. Forge new partnerships with upcoming and growing fields
6. Engage in disruptive practice

What Minahan's reflections brought up for me is the reality that evolving systems do not wait for stuck humans. As with all complex adaptive systems, the business leaders and systems we are meant to serve are currently self-correcting. Therefore, I believe what we are experiencing as the diminishing of Organization Development (OD) jobs, programs and research are simply signals of a system forming a new pattern to better serve its needs... for now... at this point in history.

Thus, what is (was?) OD capabilities are being drawn as both Matt and I have shown, into adjacent fields of practice that

do what we have not been doing. Change Management, Project Management, Talent Development, IT Planning, Agile, Management Consulting and various Training functions—these fields and others have all claimed pieces of OD while we have been developing our auto-immune disorder and struggling on life support. In my internal role, Strategic Change has already been used as a title/description for adjacent disciplines that support major change initiatives. This has led to many partnership conversations about the similarities, differences and overlaps in our fields of theory and practice. Taking a moment to reflect on what these areas offer that OD currently does not, it is not hard to see the emerging pattern. While complexity and uncertainty increase with the dawn of our 4th industrial evolution, our clients and organizations are looking for more clarity, more clear measures, outcomes, processes and linkage to their strategic goals. We, as a field, are not providing that and other areas are identifying what's needed and responding to the needs accordingly. The system likes that and is embracing it.

However, the need to navigate uncertainty will not go away. And the need to attend to our fundamental human needs that are often starved when certainty is a primary motivation will continue to be a gnawing gap. This is our ace. Developing the people and organizations with the capabilities of the future... including withstanding and navigating through complexity and emergence, is our salvation. The need for our unique DNA is not going away, it is just currently being diffused or pushed underneath the certainty stake—sent underground—and hence our experience of the 'death' and 'dying' of OD.

Meanwhile, as I show and illustrate in "It's Time to Make Organization Development Our Client," scholarship and practices that without a doubt have all the makings of what full spectrum OD is meant to be in these times are thriving. These emerging areas are both responsive to organization/business needs AND help organizations navigate through uncertainty

to achieve their goals. Dialogic, Evidence-informed, Outcome-focused. BOTH humanistic AND objective. These practices sometimes identify themselves as part of OD and sometimes do not. What is true from observation is that most of these emerging fields do not call themselves Organization Development, even when they locate within the field. Hence—Human Systems Dynamics, Large-scale Change, Appreciative Inquiry, Positive Organization Scholarship, Liberating Structures, Deliberately Developmental Organizations etc. The recognition that these are all housed within the 'new' OD needed for our complex emergent times is what makes Dialogic OD compelling.

So my conclusion—we are already in the throes of many name changes that are being 'done to us.' The closed question we face is—and yes, it is a closed one to frame the conversation prior to any open/generative ones to explore possibilities: Are we willing to let go of our sacred cows to be proactive in redefining ourselves? We have a choice to move from victims to creators of our own future—just like we tell our clients.

I agree that we need to stake our claim and fight for the reinstatement of our full scope of practice so that we can be the game changing influencers we are meant to be in organization and world systems.

I believe a name change may or may not be necessary to get us there if it only ends up being a repackaging/rebranding while we keep our sacred cows and competing commitments intact. For example, it is more essential that we let go of our tendency for independence than for us to agree on a name change... and then all go rogue and do as we please... again.

I believe what is critical is that ALL OD scholars and practitioners INSIST on the needed elements of Minahan's to-do list and my prior proposals. We must impress on our school administrators and clients what OD is and isn't and demand the resources and commitment needed to achieve the results we seek... including conducting quality research and tracking

business impact & goal achievement. We must also be willing to be accountability to set and achieve the standard of practice needed to demonstrate our commitment to an integral full-scale OD that will deliver our promise to the world. Oh-oh! Does this bring us back to that age-old back to the future conversation about professionalization, standards and credentialing?!

I think it's our game we need to change... not our name.

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Yabome Gilpin-Jackson, PhD, identifies as a Scholar-Practitioner. She is Executive Director of Leadership & Organization Development (OD) at Fraser Health in Surrey, BC, and consults/coaches externally as well.

I agree that we need to stake our claim and fight for the reinstatement of our full scope of practice so that we can be the game changing influencers we are meant to be in organization and world systems

How Can We Help? Positioning Our Work

By Peter F. Norlin, PhD

What is the true purpose and value of our work? For me, the most concise, compelling frame is embedded in only four words—the question Ed Schein reportedly used when he met a new client: **How can I help?** Obviously, the responses we hear to that deceptively simple question determine every step that follows: the perspectives on the situation that we offer; the *opportunities* for learning and change that we propose; the *choices* for action that we recommend; and the *contract* that emerges. We know, of course, that the work we ultimately do will focus on building the capacity and increasing the effectiveness of people at work. Whatever the place, whatever the task, whatever the goals, however, our overarching purpose is always *to be helpful*, to enable people and organizations of every size and shape to do their best work, to meet their own expectations, and to reach their own specific, chosen goals. What we would be wise to recognize now is that defining our intention as *helping*, and then fulfilling that purpose visibly and credibly, infuses our field with singular power.

The Singular Power of Our Work

What is the source of our potential power and influence? And what differentiates our field from others that are also in the business of learning and change (e.g., clinical psychology)? When I take a step back, I see at least three, key circles that intersect in our own professional Venn diagram, and these represent capacities that (I believe) no other fields can offer. From opening conversations (i.e. *how can I help?*) with clients, to end-of-engagement evaluation measurement and after-action reviews, we are able to offer them:

- » A *marginal perspective*—from the edge, a wide-angle view of the system’s inner hydraulics.

- » The *whole context*—an aerial view of the system’s entire inner and outer environmental landscape.
- » The *relational field*—an X-ray map of the internal web of formal and informal relationships that glue the system together.

We know from working with clients that each of these specific lenses can generate hypotheses, information, and data that guide a client to make decisions and implement strategies that increase an organization’s effectiveness. Our work, however, offers an additional, even more important source of power: the opportunity to integrate these different frames of reference, to see the *pattern that connects*, and to identify the grand, foundational narrative guiding the conversations that now hold the organization in its current reality.

This means that when we sit knowingly and comfortably in the center of our own, professional Venn diagram (where marginal, whole-system, and relational perspectives intersect); and when we can notice what is working, what isn’t, and more importantly, think about *why*; we are then in a position to unleash the unparalleled, singular power that’s available only through our work.

Because whatever we do to “help” our clients (e.g., individual, group, and/or whole organization solutions), as a field we bring them a unique resource: a merging of theory, practices, and expertise that enable us to propose and design effective, collaborative solutions to meet *whatever* needs for learning and change they bring us. And so, our “help” can—or could hypothetically—encompass all of it. Correcting operational dysfunction? Developing and implementing business strategy? Sharpening strategic thinking and assessment of business models? Re-designing and improving business processes? Check. Advising and guiding senior leadership teams? Detecting and correcting flaws in organization structures? Shaping cultures to stimulate creativity and innovation? Assessing leadership talent and designing succession plans? Check. Coaching

leaders and executives? Strengthening governance frameworks and advising boards of directors? Facilitating inclusion and collaboration in work teams? Check. The point is, whatever the business need, whatever the human dilemma, we are the field that should be able to respond to any and all of it. More to the point, we should also be acknowledged and appreciated for our unique professional role and the focus of our work.

The Insurmountable Opportunity?

One way that we might increase the visibility, credibility, and impact of our work is going back to the future. Over 50 years ago we were already defining an organization as a “sociotechnical system,” and analyzing its effectiveness first by identifying patterns in each of those channels separately, and then using a holistic lens to determine how successfully they were being integrated in overall organization performance. As we became aware of specific, independent complexities in both the social and technical streams of organization life, we could then also recognize how they were interpenetrating and interdependent. Such awareness might be a potent frame now, especially if we re-commit ourselves professionally to demonstrating obvious expertise along the entire axis of an organization’s sociotechnical needs, from human development (skills and relationships) to business performance (strategies and decisions). The point is, we are the field to do it, if we can mobilize the expertise and commitment to do it.

Now, is there a worm in this apple? Of course. Just because I think I should be able to help resolve a multiplicity of organization needs doesn’t mean that I can—or want to. It means that becoming a truly helpful, professional resource is a career-long project. It requires that, as I work, I am always curious and determined to *learn* the whole story, and that, simultaneously, I am always becoming more competent, more capable of *influencing* the whole story. And so, to use myself effectively as an instrument of change in our work, I must

be both humble and confident. I must be able to use my emotional intelligence to build relationships, *and* my technical expertise and experience to provide specific task support. In order to step confidently now into the noisy push-and-pull of a fiercely competitive marketplace and reclaim our

position as *the* leaders in the business of learning and change, we need to be ready. And if we know both our professional gifts and the boundaries of our work, when a client takes a risk to tell us how we can help, if possible, we'll be able and ready to say, *we can do that!*

*After working as the Executive Director of the OD Network and Principal of ChangeGuides, **Peter F. Norlin, PhD**, now serves both emerging OD practitioners and seasoned colleagues as a professional coach and shadow consultant. He can be reached at peter@peternorlin.com.*

What we would be wise to recognize now is that defining our intention as *helping*, and then fulfilling that purpose visibly and credibly, infuses our field with singular power.

A Response to *Change Our Name, Change Our Game: It's Time For "Strategic Change"*

By L Mee-Yan Cheung Judge

This is too harsh a critique of the field. It has grains of truth but infused by too much pessimism. I ask myself—is the field really that bad? Or is Minahan describing another cyclical period where any field of knowledge needs to be self-critical to stay alive in the turbulent context in which the field operates? Are the situations Minahan despairs with mainly a USA reality?

OD grew out of a reaction against the earlier Taylorism, the dominant approach of scientific management, not to mention the dark aftermath of the world wars. The context called for a more humane paradigm in looking at society, community, and organization. This was supported by a liberal political climate after the war. During that era, the field of OD achieved major milestones, providing powerful individual and humanistic alternatives to the mechanical view of the world. However, when Conservatism returned during the 1960s, the OD community was given a very clear message from those who used us that it was no longer enough to be process facilitators or organization therapists. They now needed experts in work design, reward systems, organization structure, and strategic formulation. It becomes clear that it is the strategic and macro system level of work that is needed with strong focus on task, work, performance, and productivity. We are asked to know what it takes for businesses to survive in the harsh economic downturn. (Incidentally, does this remind us of where we are now, except with global politics gone ultra-right?)

This situation during the 1960s provided a meaningful backdrop to what we are discussing now, because it was our reaction to the rejection by clients during

this period split the community into two and eventually three camps. The conflicts and splits between these three camps continue to stay with us even now.

The *first camp* was those who worked within the conservative mandate on performance, task, and productivity, which Drucker called the “adaptors.” The *second camp* was those who continued to ground their practice on liberalism, humanistic values, even greater commitment to the growth of individual potential and participatory democracy, which Drucker called the “holders.” The *third camp* were those who thought both sides are necessary to achieve the goal of OD, and they worked hard to bridge the first and second camp. Drucker calls them the “bridgers.”

There are pros and cons of each of the camps. People like Stan Herman, Michael Beer, and Ed Schein have all warned the community that if we tip the balance over to one side (the hard side) we will sacrifice the organization processes, the DNA of OD. But if we tip over to the soft side, we will become irrelevant to the business, which is one of Minahan’s biggest concerns. In fact, Greiner’s (1972) red flags, which Minahan mentioned were directed against the “holders”—because they are putting individuals before the organization, putting behaviour before diagnosis, putting process before task, etc. Later, Greiner directed another set of red flag signals to the “adaptors” whom he pointed out have neglected involvement of people in types of situations such as: top management decision making, strategic formulation, mergers and acquisition, corporate governance, and personal integrity etc.

This significant piece of history affirms that our community does take the context in which we practice seriously. As a result, different practices, depending on how the practitioners judge what is relevant in that changing context, and what value-added service are in the eyes of those they serve, will emerge. While self-focused motives will always be there—due to our own sense of self mastery, and what market is available to us, but our sense of political expediency will always be part of

what the community needs to do to “stay alive.” I believe, in current time, many OD practitioners already got the message, and are adjusting themselves back to the “adaptor” position.

Regardless of what our natural affinity with whichever camp: (a) we need to have a wider tolerance for those who are not in our camp; (b) all three camps are important to the development of the field.

OD has clear DNA—we are a process-driven, humanistic-based, people-focused oriented field with our dual goals to build (a) organization effectiveness in achieving its strategy and vision; (b) organization health for those who work within as well as those constituents the organization aims to serve. This is our past, our NOW, our future value and operating base line, something we do not say goodbye to.

Due to the changing socio-economic-political climate through time, sometimes OD is welcomed with open arms, and at other times people develop antibodies towards anything “liberal” and this includes OD, as we are perceived as not hard enough to help organizations to drive profit and productivity. During the hostile period, we all need to hold our nerves, continue to do good work, apply our life-long learning to expand/deepen our practices. We also need to cultivate new partnerships, undertake cross-disciplinary work, and work hard to take OD education to the next level. This is definitely **NOT** the time to retire nor give up the name of OD.

We definitely do not want to say goodbye to the past. Without the past and all the giants whose shoulders we stand on, we would not have the NOW in OD. No, we **do not** need a new name (this will have unfortunate ramification for the development of the field in other parts of the world). We need more OD practitioners who are institutional builders to advance the field and get better in evaluating the impact of our OD work. Finally, we need to stretch the OD curriculum across the breadth of what the business does, taking the content of all three camps seriously.

The world needs us, whether they know it or not. The NOW time calls us to

be more of an adaptor, to be more savvy with the business reality the clients face, and to help clients to stay afloat. But we can't do this without being "holders" also—to hold up our belief of fairness, justice, and human rights. Many clients instinctively know our rich OD DNA is needed to build a sustainable future. In that sense we are "bridgers" by instinct.

Fuel for the next phase of development of OD, especially in USA, will come from the borrowed energy and resources from around the world. OD is thriving in Europe, and especially in UK. The Chinese businesses are finding value-added help from OD in spite of their suspicious

attitude. South American OD practitioners are doing amazing things. Other African and Asian countries are ploughing away to put OD roots down in very hostile political and economic environments. The field is alive and continues developing in an exciting way, maybe not in the way we expected from our lenses. IODA continues to work diligently to encourage OD practitioners in other parts of the world. Their steady hard work should be applauded.

Finally, there are lots of "bridger" OD people out there, Minahan is one of them. These "bridgers" become role models for others. There are many upcoming OD talents who are natural "bridgers" and they

will definitely be the ones who will keep the flags of OD flying high. We "aging" OD practitioners need to stay chill, stand up proud, tell appreciative stories of what the field has accomplished and invest our time and effort to grow the young "bridgers"—it will be they who will secure, sustain, and expand the future of OD. I am pretty sure of this. Thank you, Matt, for your passionate appeal to all of us to stay alive. We will!

L Mee-Yan Cheung Judge is a scholar-educator-practitioner and founder of Quality & Equality.

We also need to cultivate new partnerships, undertake cross-disciplinary work, and work hard to take OD education to the next level. This is definitely NOT the time to retire nor give up the name of OD.

“An important and often overlooked reason for the argued decline of OD is that, despite having a rich history of innovative theory and practice, OD has, over time, had very little to say about how organizations create value and, as a result, there is no explicit ‘theory of the firm’ for OD.”

The Future of OD from a Stakeholder Perspective

By Lisa M. Meyer

In a revelatory coincidence, two essays, both entitled *The Rise and Fall of OD*, have recently appeared in the OD literature (Burke, 2018; Goldberg, 2019). Although the esteemed authors of the two essays bring differing views to the factors that have contributed to both the rise and fall of OD, the general premise of both essays, as stated by Burke, is that “the field of OD, although not dead, is stagnant and not growing with respect to inventiveness and innovation” (Burke, 2018, p. 188).

The irony of this premise is that organizations are increasingly encountering the complex types of problems for which OD is best suited. These are grand challenges like sustainable growth, innovation, inclusion, design thinking, and safe, equitable workplaces. These challenges present extensive theorizing opportunities and call for novel ideas and unconventional approaches for tackling their evolving mix of technical and social elements. They also require individuals like OD scholar practitioners who are prepared to work with multiple perspectives, across multiple disciplines and in the messiness of real-world problems (Eisenhardt, Graebner, & Sonnenshein, 2016; Ferraro, Etzion, & Gehman, 2015).

Increasingly, OD practitioners are faced with the marginalization of OD logics in management and organization studies (Jacques & Durepos, 2015) and OD practitioners have been stuck in limited roles (Bradford & Burke, 2006). This has resulted in the relegation of OD practices to fixing mid-level problems or implementing “roll outs” as opposed to being involved

in the co-discovery and co-invention that comes from integrating OD perspectives into the strategic fabric of an organization (Goldberg, 2019).

I argue that an important and often overlooked reason for the argued decline of OD is that, despite having a rich history of innovative theory and practice, OD has, over time, had very little to say about how organizations create value and, as a result, there is no explicit “theory of the firm” for OD.

In this article, I will examine how these circumstances have limited OD’s influence at the highest level of organizations. I will also argue that by connecting OD to stakeholder theory as a theory of the firm, OD scholar practitioners are better prepared to participate in the necessary conversations about value creation and to help organizations grow in ways that are more purposeful, ethical, and sustainable.

Why OD Needs a Theory of the Firm

In order to elevate the impact of OD in organizations, a vocabulary that speaks the humanistic language of OD and also speaks the language of business and value creation is needed. This is, however, not new thinking. Kurt Lewin believed that in order to understand and address the issues inherent to the real-world problems of organizations it was essential to integrate the vocabularies of the social sciences, starting with economics (Colucci & Colombo, 2018; Burnes & Cooke, 2012).

An avenue to exploring a vocabulary for OD that speaks to both OD values and

value creation is to think about it in the context of the theory of the firm. To pursue this line of thinking I will, for clarity purposes, provide a simplified explanation of how I am differentiating between organization theory and theory of the firm.

Traditionally, the vocabulary of OD has been based on the values and language of humanism and social psychology (Bradford & Burke, 2004). This has produced organization theories that are behavioral in nature and mainly concerned with *how* organizations work. Whether it is implicit or explicit, there is some organization theory present and embedded in almost every OD intervention.

By contrast, a theory of the firm is managerial in nature and speaks to *why* an organization exists; its purpose, how it creates value and for whom. A theory of the firm provides the assumptions used by managers in setting strategy, allocating resources and measuring productivity.

The Dominance of Principle-Agent Theory.

The theory of the firm that has dominated mainstream economic and managerial thinking for the past several decades is the principal-agent theory (Jensen & Meckling, 1976), which is situated in a perspective that is more generally referred to as shareholder primacy or profit maximization. This perspective holds as its main argument that the singular goal of a firm should be to maximize the economic return to shareholders or owners (Bower & Paine, 2017).

Critics of principal-agent theory include Ghoshal (2005) who blamed the perspective of shareholder primacy for the absence of any moral or ethical considerations in management theories like

principal-agent, and Bower and Paine (2017) who wrote that the dominance of the principal-agent theory of the firm has resulted in more pressure for short-term results, less investment in people, and fewer transformational strategies and innovative business models.

This leads to my premise that an overlooked cause for the diminishment of OD work in organizations has been the rise and eventual dominance of the principal-agent theory of the firm. I support this

Increasingly, OD practitioners are faced with the marginalization of OD logics in management and organization studies and OD practitioners have been stuck in limited roles. This has resulted in the relegation of OD practices to fixing mid-level problems or implementing “roll outs” as opposed to being involved in the co-discovery and co-invention that comes from integrating OD perspectives into the strategic fabric of an organization.

premise by observing how the foundational Lewin-based logics of OD—those involving equilibrium, behavior, and values—diverge in significant ways from the assumptions embedded in principal-agent theory. This results in most OD-based behavioral theories being fundamentally incompatible with principal-agent theory of the firm.

Table 1 outlines the divergence in assumptions between principal agent (shareholder primacy) theory and the theories of Kurt Lewin.

The Alternative of Stakeholder Theory.

A more compatible alternative to the perspective of shareholder primacy is

stakeholder theory, which is an alternative that speaks the language of business and value creation while sharing the assumptions found in OD regarding equilibrium, behavior and values.

Stakeholder theory is an approach to business that is about creating as much value as possible for the firm’s stakeholders without resorting to tradeoffs. It is about how customers, suppliers, employees, financiers (stockholders, bondholders, banks, etc.) communities and management

cooperate to create and trade value (Parmar, et al., 2010). Stakeholder theory is managerial in nature and, since its inception in 1984, it has influenced a variety of fields, including strategic management, finance, accounting, marketing, law, health care, public policy, and environmental studies (Freeman et al., 2010).

Stakeholder theory is described as a framework; a set of ideas from which a number of theories can be derived (Freeman et al., 2010). This is much like the way that Lewin saw field theory, not as a theory in a formal sense, but as an approach to the conceptualization of theories (Patnoe, 1988). From a stakeholder perspective,

Table 1. *The divergent assumptions in Principal-Agent theory and Lewinian OD theory.*

Assumptions	Equilibrium	Behavior	Values
Principal Agent Theory	A dynamic equilibrium is controlled by equal, opposing forces.	A person will always make prudent, rational choices that are in his or her best self-interest.	Values-free (explicitly)
Lewin-based OD Theories	A quasi-stationary equilibrium is achieved through a combination of enabling and restraining forces.	A person’s behavior is a function of the individual and his or her environment.	Values-based (explicitly)

business can be understood as a set of relationships among groups that have a stake in the activities that make up the business.

A theoretical integration of stakeholder theory and OD provides a rich set of ideas: a holistic integration of managerial and organizational concerns; sensitive to the dynamics of organizing at a systems level; and supportive of decisions that involve strategy development, organization design, work system design, goal setting, prioritization, and resource allocation (Beer, 2013; Freeman et al., 2010).

In *Table 2*, the relationship between OD and stakeholder theory is outlined through a set of shared and complementary dimensions.

Connecting Stakeholder Theory to OD. The concept for stakeholder theory was originated in 1984 by Edward Freeman and initially was called a stakeholder approach to strategic management (Freeman, 1984). In its development Freeman drew from various literatures including corporate planning, systems theory, and corporate social responsibility. He also incorporated the views of the original stakeholder theorists like Eric Trist who, along with Frederick Emery originated socio-technical systems thinking and heavily influenced the rise of OD. Freeman and Trist were, at the time, part of the Wharton Applied Research Center at the University of Pennsylvania's Wharton School of Business along with Russell Ackoff, James Emshoff and Ian Mitroff. Freeman described the research center at Wharton to be organized much like Trist's Tavistock Institute, which was modeled on Kurt Lewin's Research Center for Group Dynamics at MIT—a kind of real-world consulting firm combining a multi-disciplinary group of research staff, students, and faculty and focusing on real-world problems (Freeman, 1984; Trist, 1993).

Building from this model, the stakeholder approach to strategic management was, like OD, integrated, practice-based and problem-oriented. Characteristics shared by both OD and stakeholder theory include that they are both based in practice, and both hold the belief that people need

Table 2. Shared and complementary dimensions of organization development and stakeholder theory.

Dimension	Organization Development	Stakeholder Theory
Orientation	Integrated, Based in Practice	
Shared intellectual DNA	Kurt Lewin, Eric Trist, Tavistock Institute	
Disciplinary Influences	Behavioral Sciences Social Psychology Organization Theory	Economics Ethics Organization Theory
Nature of Theory	Behavioral in Nature	Managerial in Nature
Primary Focus of Theory	Relationships within Organizations	Relationships between Organization and Stakeholders
Phenomenon of Interest	Change	Value Creation

jointly to seek and create meaning within organizations (Freeman et al., 2010). However, they work in different ways.

OD theories like Lewin's field theory, Trist's socio-technical systems and Argyris' organizational learning theory are behavioral in nature and considered to be meso-level theories for how they are primarily concerned with relationships between individuals and groups within organizations (Cornelissen & Durand, 2014). Stakeholder theory is managerial in nature as it is concerned with the problem of value creation and trade against a backdrop of constant environmental turbulence that comes from things like corporate takeovers, shareholder activism, global markets, government regulations, consumer activism, increasing environmental concerns, and changes in communication technology. (Freeman et al., 2010; Laplume, Sonpar, & Litz, 2008). Stakeholder theory is considered a macro-level theory for how it speaks to relationships between internal and external stakeholders at the organization level (Cornelissen & Durand, 2014).

For the OD scholar practitioner, adopting stakeholder theory as a theory of the firm connects these integrated, multidisciplinary, macro- and meso-level approaches that draw from both economics and behavioral disciplines. This connection of the *how* and the *why* affirms a non-dualistic stance that says that business can be about both economics and ethics and also aligned with the traditional humanistic values of OD.

Reflecting on Stakeholder Theory, Kurt Lewin, and OD

Why is it that OD and stakeholder theory have previously not been connected? This seems to be due to what Slinger (1999) called "strange blind spots" in the literature and the lack of theoretical cross-pollination among the disciplines (Kozlowski & Klein, 2000). Slinger (1999) observed an almost complete exclusion of important socio-psychological work in the economics literature noting that work that is cited widely in the management and applied psychology literature is almost never cited in economics, including Emery and Trist's sociotechnical systems approach or McGregor's theory X and theory Y. Kozlowski and Klein (2000) observed that organizations may be integrated systems, but organizational science is not. Perspectives are spread across different disciplines and literatures, obscured by the barriers of jargon and confused by competing theoretical frameworks and analytic systems. Yet, it is interesting to note that almost in spite of this disciplinary isolationism, most contemporary arguments that favor a stakeholder perspective, regardless of their disciplinary origin, have some foothold in the integrated, system-based logics of Kurt Lewin.

Lewin introduced a stakeholder perspective to group behavior with the concept of the interdependence of task and fate. This concept is consistent with the views of stakeholder theory; seeing interests as joint and inherently tied together, forming

the group as a “dynamic whole,” a concept that ties to systems theory (Bargal, Gold, & Lewin, 1992; Burnes, 2006; Parmar, et al., 2010).

By aligning organization development with stakeholder theory, the language of OD becomes incorporated into the language of business and value creation, and concurrently, a stakeholder perspective is supported by important OD practices like Lewin’s action research, Argyris’ double loop learning, and Schein’s process consulting. This connection places less emphasis on discrete change projects in exchange for more emphasis on processes and designs that enable sustainable, continu-

Aided by a stakeholder vocabulary, leaders, managers, and OD scholar practitioners, instead of talking across competing theories and perspectives, can now engage in productive conversations about values and value creation. Even if stakeholder theory is not an espoused theory of the firm, it can still, through the language and values of OD, be useful in connecting different perspectives, different needs, and ethical considerations to questions of organization strategy, design, innovation, and value creation.

ous adaptation in ever-evolving environments. The necessity of economic success for all types of organizations, whether they are privately held businesses, publicly traded corporations, mission-driven non-profits or public institutions, is recognized in how stakeholder theory seeks to balance strategies for economic success with a concern for sustainability and healthy organizations. Aided by a stakeholder vocabulary, leaders, managers, and OD scholar practitioners, instead of talking across competing theories and perspectives, can now engage in productive conversations about values and value creation. Even if stakeholder theory is not an espoused theory of the firm, it can still, through the language and values of OD, be useful in connecting different perspectives, different needs, and ethical considerations to questions of organization strategy, design, innovation, and value creation.

Imagining A Different Future for OD

Support for alternatives to the shareholder primacy perspective comes from surprising corners. Jack Welch, the longtime CEO of General Electric, in March 2009, told the *Financial Times*:

On the face of it, shareholder value is the dumbest idea in the world. Shareholder value is a result, not a strategy.... Your main constituencies are your employees, your customers and your products. Managers and investors should not set share price increases as their overarching goal.

In a 2017 *Harvard Business Review* article entitled “The Error at the Heart of Corporate Leadership,” two Harvard Business School professors wrote:

The time has come to challenge the agency-based model of corporate governance. Its mantra of maximizing shareholder value is distracting companies and their leaders from the innovation, strategic renewal, and investment in the future that require their attention. History has shown that with enlightened management and sensible regulation, companies can play a useful role in helping society adapt to constant change (Bower & Paine, 2017).

Had alternatives to principal-agent theory, represented by stakeholder theory and others, led to a pluralism of theories of the

firm instead of being lost in the dominance of shareholder primacy, one can imagine that the field of OD might be in a very different place today, with:

- » **Greater clarity** about a desired future state.
- » **Greater impact** at the highest level of organizations; concerned with alignment of purpose, organization design, culture, strategy, processes, policies, incentives and technology, at the systems level.
- » **Better prepared scholar practitioners** who incorporate integrated, multi-disciplinary thinking into their practice and who are either a part of or a resource to senior management, helping to frame the right questions and facilitating ways to resolve them.
- » **Restored philosophical underpinnings**—a reunification of theory and practice through a restoration of a Lewinian logics in OD.

Conclusion

For OD to increase its value to organizations and the people in them, it is necessary to conceive of new approaches to OD practice. The explicit adoption of stakeholder theory as a theory of the firm for OD sets the stage for innovation, so that organization development in its many guises and manifestations can better support organizations looking to balance the needs of many stakeholders, and grow in ways that are more purposeful, ethical, and sustainable.

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Lisa Meyer is a Minnesota-based author and consultant working with organizations undergoing change. Lisa's career in business encompasses a wide range of experiences with senior positions in marketing and development. She holds a Master of Fine Arts in arts administration from the University of Iowa and an Ed.D. doctorate in organization development and change from the University of St. Thomas. She can be reached at lisameyer@att.net.

Organization Development

A Strategic & Operational Corporate Governance Imperative

By Justine Chinoperekweyi

Organization development (OD) has attracted increased attention in organizational literature as a field essential to driving sustainable organization change but has not yet fully penetrated the mainstream corporate governance discussions (Burke, 1993). Contemporary organizations have assumed various conceptions, such as complex adaptive systems, organisms, and chaotic structures; yet the corporate governance models have predominantly relied on pedantic rules-based approaches, and in few instances, with a limited fusion of the principles-based approach. Sustainable organization change requires innovation and the integration of the theory and practice of organization development (Daft, 2000). Therefore, there is need for corporate governance literature and discussions to precisely capture the practice of organization development not as a mere consultant role or peripheral corporate

governance function but as a strategic and operational imperative. In view of the macro, meso, and micro environmental influences, change has become inevitable and a threat to organizational sustainability; hence the need to incorporate OD in corporate governance discussions (Burnes, 2004). *Figure 1* illustrates the connection between organization development and the technical and adaptive challenges.

Sustainability in complex adaptive systems is a function of effective change management embedded in the theory and practice of organization development (Carnall, 2003). Most organizations are involved in the heartless hustle for razor thin margins thereby prioritizing short-term profits while sacrificing long-term partnerships. The soul of an organization is put in a profit-at-all-cost vice and the positive spirit of workers is squeezed out. Most organizational leaders and managers

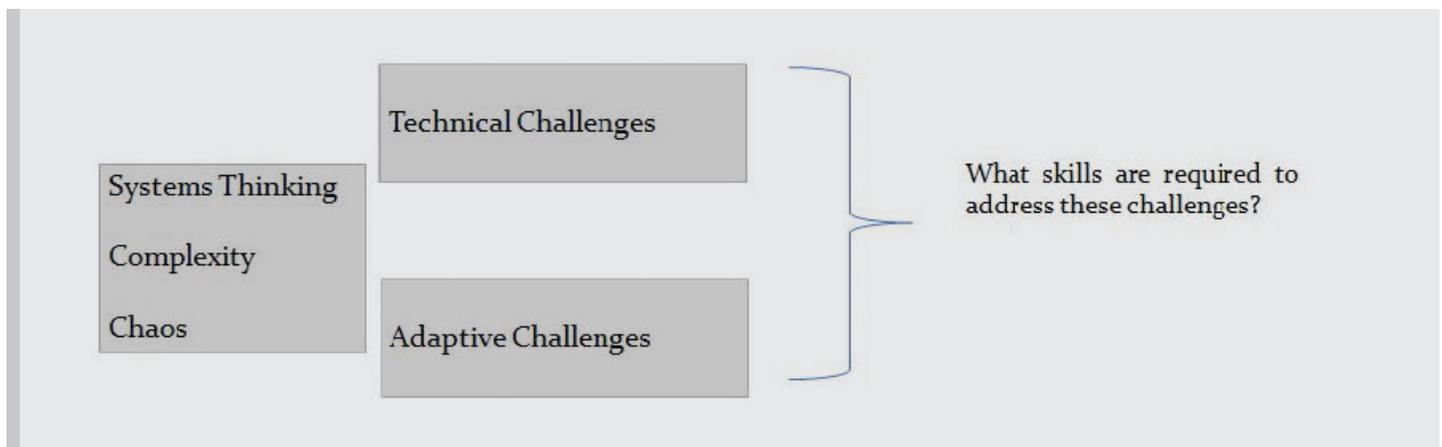


Figure 1. Organization Development Challenges

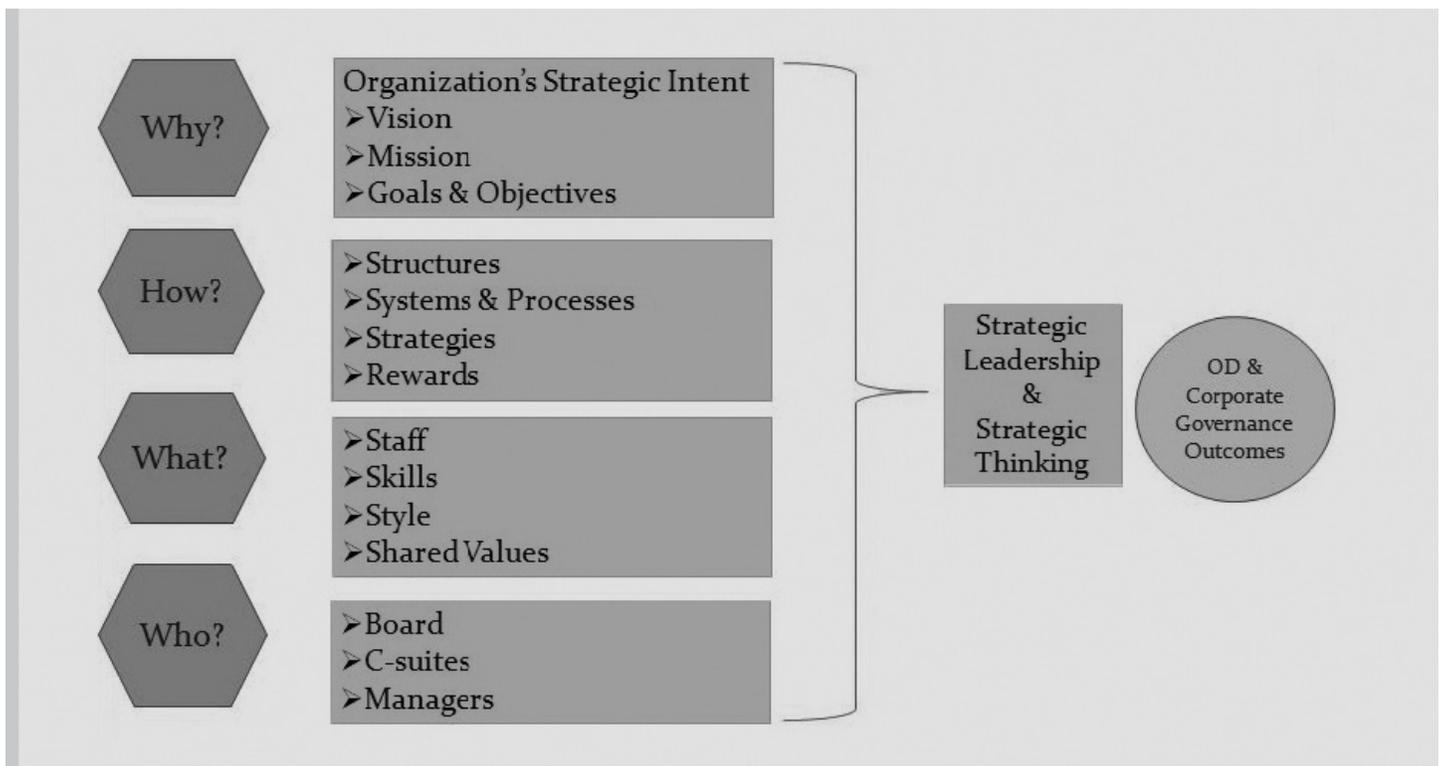


Figure 2. Essential Elements in Appreciative Questions

want to create great teams and great organizations. Organization development has assumed increased attention as a precondition for organization sustainability and the building of high-performance teams. OD has become a practice for resolving most of the corporate challenges (technical and adaptive) prevalent in the modern business environment. The creation of strong and high-performance organizations is directly related to the extent of organization development principles and practices adoption. Understanding the evolving business and corporate governance environment helps organizations to make changes and adaptations that support organizational effectiveness.

Objectives & Significance

There are four questions that should be addressed as one inquires about the assertion that organization development is a strategic and operational corporate governance imperative. These questions are: *Why? How? What? Who?* The ability of organizations to holistically respond to these four appreciative questions through the application of OD principles and practices is essential in crystallizing the corporate governance function.

As Figure 2 demonstrates, organization development is a strategic and operational corporate governance imperative that can be summarized by the core elements of the four essential appreciative questions leading to the objectives. These elements are essential in addressing the challenges of the future governance model such as fragmentation, instability, and diversity.

The future governance model encompasses the corporate community model, embedded sustainability, and the integration of nascent Artificial Intelligence (AI). The incorporation of Artificial Intelligence is supported by the view that 80% of the world economy is being transformed by AI (Lauterbach, 2018). Lauterbach further indicated that AI has the incredible potential to disrupt businesses, societies, and lives. Hence, the future governance model should integrate AI with the other emerging models. The focus should be on a hybrid corporate governance model that embraces ethics and elevates the strengths of individual organizational members. The skills of board members need to be broadened to capture innovation, transition, and continuity (Fry, 2012).

The failure to capture the broad board skills and integrate OD skills and techniques significantly affects coherence,

adaptability, and organizational renewal. Renjen (2012) identified eight board roles: (1) steward of the enterprise; (2) model of values and core beliefs; (3) guardian of strong governance; (4) strategist; (5) risk and scenario planner; (6) public face, and market maker; (7) custodian of capital markets; and (8) global advocate. The two roles of *strategist* and *risk and scenario planner* require OD principles and practices. The incorporation of OD in these roles enable directors to provide important counsel during strategy formulation, roll-out, and ongoing adaptation to change. To effectively perform the strategist role, directors need to enhance three vital skills: *ask, listen, assess*. These skills are supported by Appreciative Inquiry principles. OD supports boards in helping management refine strategy and in exploring for promising adjacencies in their core business.

In terms of the risk and scenario planner role, boards should adopt OD in developing two vital skills: *imagine* and *anticipate*. These skills enable the organization to quickly adapt strategy to change. Boards should leverage on OD tools and techniques to identify potential challenges and effectively evaluate their impact. OD will enable boards to scan beyond the horizon and anticipate emerging threats

Table 1. Egan's 10 Clusters of Organization Development Outcomes

- Advance organizational renewal.
- Engage organization culture change.
- Enhance profitability and competitiveness.
- Ensure health and well-being of organizations and employees.
- Facilitate learning and development.
- Improve problem solving.
- Increase effectiveness.
- Initiate and/or manage. change.
- Strengthen system and process improvement.
- Support adaptation to change.

and opportunities. Renjen (2012) further asserted that culture and strategy are key assets of organizations. The incorporation of OD as a strategic and operational corporate governance imperative would help the organization to align culture and strategy.

Literature Review

Organization Development (OD)

Beckhard (1969) defined organization development as “an effort [that is] (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.” This definition of organization development focused on transition (planned change). Scholars and practitioners assert that the business operating environment is highly volatile, uncertain, complex, and ambiguous (VUCA) to plan change. In contrast to the proactive organization development approach in Beckhard’s definition, Bennis (1969) positions organization development as reactive, hence the introduction of the fundamental organization development concept of organization culture. Bennis (1969) defined organization development as “a response to change, a complex educational strategy intended to change beliefs, attitudes, values, and structures of organizations so that they can better adapt to new technologies, markets, and challenges, and the dizzying rate of change itself.”

Literature also states that *organization development* is any process or activity, based on the behavioral sciences, that, either

initially or over the long term, has the potential to develop in an organizational setting enhanced knowledge, expertise, productivity, satisfaction, income, interpersonal relationships, and other desired outcomes, whether for personal or group gain; or for the benefit of an organization, community, nation, region, or, ultimately, the whole of humanity. The evolving concept of organization development facilitates the close connection with corporate governance.

Organization Development Outcomes

There seems to be a symmetrical relationship between the organization development outcomes and the benefits of corporate governance. According to Egan (2002) there are ten (10) clusters of desired outcomes in organization development. These clusters are shown in *Table 1*.

Organization development, like corporate governance, focuses on building high performance individuals, teams and organizations. It involves the systematic approach to aligning the organization’s structure, leadership, learning, strategy, culture, and relationships. As should be the case in corporate boardrooms, organizations use numerous drivers and techniques to identify needs or developmental opportunities. The organization development drivers, tools and techniques are also used in corporate governance by boards of directors, C-suites, and managers. Examples of organization development drivers include processes, strategic intent, workplace diagnostic, policies & procedures, risk, and performance enhancement.

These drivers provide valuable insights into strategic planning and the determination of OD interventions that drive organizational effectiveness. In view of the complex and chaotic business environment, organizations should be able to identify the OD drivers and capitalize on those drivers to achieve organizational effectiveness. This demands that organization development practitioners be incorporated into board discussions.

The OD skills are essential corporate discussions given the fact that OD practice is informed by action research, systems thinking, organizational learning, and behavioral science. Organization development helps facilitate sound corporate governance by aligning organizational activities, structure, culture, and strategy. It is also a strategic and operational imperative because it stresses a process orientation, collaboration (*constellations of strengths*), and a systems orientation towards achieving business results.

OD Interventions & Models

Organization development interventions refer to the measures to be adopted by an organization with the view to enhance organizational performance (financial and non-financial performance). Organizational performance is rooted in the capacity and motivation of organizations to achieve their goals, to better fulfill their mission. This is one of the key focus areas of directors, C-suites, and managers in organizations. Organizations are embedded in their environment, and as a result of this, organization development interventions also refer to the actions taken to influence the enabling environment in which organizations operate and the relations existing among organizations. Organizations are composed of individuals; therefore, organization development also includes the interventions aimed at individual development to improve their performance in an organizational context (Burke, 1993). Most broad prescriptions on directors’ skills fail to precisely capture these views, hence shirking organization development skills in corporate governance discussions. The OD interventions are the outputs of the integration

and alignment of all organizational members. It is therefore imperative that OD be considered as a strategic and operational corporate governance imperative.

Organization Development Models Useful for Corporate Governance

Action Research Model

This is a participatory approach of simultaneous inquiry and action. The primary reason for engaging in action research is to assist the “actor” in improving and/or refining his or her actions. Corporate governance frameworks and discussions should be informed by the Action Research Model rather than the exclusive reliance on broad prescriptions and the pedantic rules-based governance approach. For example, Action Research is commonly used to aid corporate governance through the development of the Balanced Scorecard (Smith & Kerridge, 2012). It is imperative for corporate boards to adopt *Participative Action Research*, which relies on cyclical process of gathering information, knowledge construction, and decision making (McIntyre, 2008). Action Research is a valuable and practical technique to support board roles, defining the organization’s strategic intent, and translating strategy into action. This model stimulates commitment of the individual board members because of its focus on participatory and experiential approaches.

Appreciative Inquiry

This concept relies on asking questions that focus on the positive strengths of an individual, work group, or organization. The key assumption is that reality is socially constructed. Directors, executives, and managers should foster an environment that is informed by Appreciative Leadership and principles-based methodologies to corporate governance. Corporate boards should adopt the Appreciative Governance model, which emphasizes achieving change through intentionally designing policies, structures, and practices that capitalize on individual and collective strengths in line with the organization’s strategic intent. The future governance model should embrace the multiple

Methods of Knowing, Engagement, Thinking Together, and Acting Together (AI Practitioner, 2011). Cooperrider and Srivastva (1987) defined Appreciative Inquiry as “a collective action and information research theory assisting development of a normative vision, and developing group, organization, and society’s demands as a whole.” Appreciative Inquiry helps in the hybridization and strengthening of corporate governance through encouraging participation and collective decision-making (Munire & Can, 2012). The adoption of Appreciative Inquiry by corporate boards ensures the participation of all members in the decision-making process.

Star Model

The Star Model helps in service design based on adaptation or aligning strategy, structure, processes, rewards, and people. Corporate governance should focus on addressing fragmentation challenges across the entire organization by building congruence across all subsystems. Through the adoption of the Action Research Model and Appreciative Inquiry, corporate boards should focus the boardroom discussions on ensuring alignment across the five elements of the Star Model. The model is also a useful performance measurement tool for enhanced corporate decisions. The design policies of the model are essential to refining the future governance model and positively influencing the behavior of all stakeholders.

The Burke-Litwin Model

This model views an organization as a system and works as a diagnostic tool in determining points of interventions and levers of change. The Burke-Litwin model is based on 12 organization dimensions that drive change in organizations. Change is the new constant in organizations and corporate governance decisions and discussions should be informed by the 12 organization dimensions as identified in the model. Boards can integrate the model as a diagnostic framework to assess organizational effectiveness (Martins & Coetzee, 2009). This model is an open-system-based framework that can provide boards with valid and accurate information

regarding overall effectiveness. The model helps boards to identify and focus on transformational and transactional aspects to change. The Burke-Litwin Model should be incorporated in the future governance model as it helps boards to understand the change situation, to determine the kind of change required, and then to target interventions toward factors of the organization that will produce the desired change (French & Bell, 1999).

The Emergence Approach

The emergence approach is a contradiction of the rational, deterministic OD models. The approach indicates that change is not easily managed and as such outcomes are difficult to control. The skills of directors should be enhanced, and independent thinking should be encouraged to ensure sound corporate governance. Boards should have a clear perception and intelligence through Action Research, Appreciative Inquiry, and Whole System Thinking. Innovation and participatory approaches are essential in the ability to overcome emergent change.

Systems Thinking

Systems Thinking is at the center of organization development and change management. According to empirical literature, there are three common criteria that underlie most developmental models. The first criterion is that the more developed a system, the more aware it is of itself and it can talk to itself about itself. The second belief is that the more developed a system, the less it is driven by reactive, unconscious emotions, motivations, and cognitive frameworks, and the more decisions and actions are based on reason, rationality, and cognitive complexity. The third criterion is that the more developed a system, the more it is able to actualize its potential. Systems Thinking is essential in solving the increasing complexities that boards encounter in the contemporary business environment. Jarad (2015) states that systems thinking is a critical capability for individuals involved in the design, analysis, and transformation of complex systems. Systemic thinking is a high-level thinking skill that enables boards to effectively engage and design

system governance. The future governance model should encompass holistic thinking approaches and an assessment of individual board members' capacity for systems thinking. Boards should always expect uncertainty (*complexity*), preserve global integration (*integration*), incline to global interaction (*interconnectivity*), take multiple perspectives (*embracement of requirements*), react to emergent situations (*emergence*), focus on the whole (*holism*), and accommodate to change (*flexibility*) (Jarad, 2015).

OD models are relevant to the achievement of organization development outcomes and enhancing corporate governance. These models are founded on the understanding that organization development is not a normative field and as such with the rapidly changing business operating environment it is essential for corporate governance to incorporate organization development practice into all its fabrics. An article published by the Institute of Organization Development (IOD) states that organization development principles and practices are considered as a strategic and operational roadmap to sound corporate governance for the following reasons:

- » Decisions are fact-based and cultivate essential leadership traits
- » Minimizes risks by addressing the increasing digital complexities
- » Aligns an organization to the operating environment
- » Enhances the capacity to resolve organizational issues
- » Builds organization-wide congruence
- » Unifies internal stakeholders
- » Enhances strategic awareness among all members

Embedding OD theory and practice in corporate board rooms is the inevitable catalyst to addressing most business challenges through an enhanced strategic awareness and macro-perspective to corporate governance, which leads to the organization's capacity to thrive and win. OD skills training and education should be a top priority on director continuous capacity development programs of the modern corporation. Organizations should seriously consider enhancing the organization development skills of all members in order

to build high performing teams, improve individual capabilities, create an enabling environment, and improve organizational performance.

Change Management

Change management is one of the essential areas that both organization development and corporate governance seek to address. Change in an organization creates ripples in the routine activities and in operations. Change management is associated with job satisfaction, levels of uncertainty and organizational commitment (Burnes, 2004). OD helps in averting negative ripples from change in organizations, hence sustaining continuity (Fry, 2012). Organization development models support directors, C-suites, and managers in examining an organization's change readiness. Organizational change strategies cannot be developed and implemented overnight or by merely following board meeting discussions (Daft, 2000). The process starts at the root level and takes time in being wholly implemented, hence the significance of Action Research Model and Whole System Thinking. Change management strategies should be informed by third-generation organization development methodologies. This therefore contradicts the rubber-stamping role of directors and the views of Managerial-Hegemony Theory in corporate governance. This view reinforces the need to incorporate organization development methodologies in corporate governance. Change management should be supported by inquiry, that is, critical analysis and evaluation of the internal and external operating environment. Organizations should adopt and implement the appropriate methodology to understand and capture the upheavals that often come with changes (Carnall, 2003). The whole process relies on dialogic OD methodologies which should be very subtle yet dynamic to ease the impact related to the changes.

Critical Organization Development and Change Management Skills

Corporate governance prescriptions in most jurisdictions do not precisely capture

organization development skills as essential for directors. There are critical skills that directors should have in order to build high performance dynamic organizations. Most of these skills are being developed through Continuous Professional Development programs; indicating the increased appreciation of such skills in the corporate board rooms. Following are some of the skills that organization development can bring to corporate board rooms. According to the Institute of Organization Development (2018), these skills will help organizations diagnose and identify specific organizational needs and deploy appropriate methodologies and plans. These skills help directors to understand the benefits of nascent OD tools and techniques: *Constructive Depolarization*—corporate boards need to be effective at building high performance teams and organizations by capturing diversity; *Circular Vision*—organization leaders need to develop the circular vision and be in a position to anticipate the unexpected; *Entrepreneurial Spirit*—the Stakeholder Value corporate governance perspective demands that leaders should possess entrepreneurial spirit; *Smart Mob Organizing*—organizations should be able to leverage on technology and enhance the ability to engage social networks; *Agile & Digital Business Skills*—corporate leaders need to have agile and digital business skills; *Bio-Empathy*—corporate leaders need to be able to run organizations with a consideration of the natural environment; *Out-centric*—leaders need to shift from being ego-centric to out-centric; and *Emotional Intelligence*—this encompasses the need for leaders to enhance their levels of self-awareness, self-regulation, and judiciously and empathetically manage interpersonal relationships.

Summary and Implications

Organizations are evolving and as complex adaptive systems there is a need for renewed thinking about corporate governance. The exclusive reliance on broad corporate governance prescriptions have led to retarded organizational growth, leading to the necessity of organization development methodologies and skills in the

corporate board rooms. The crystallization of the future governance model demands the incorporation of OD tools, techniques, and values into corporate governance discussions and debates. Constructive engagement, collaborative learning, digital dexterity, and nurturing circular visioning are some of the ways through which boards can be assisted to understand the benefits of nascent organization development tools and techniques. The nature of organizations is becoming increasingly complex as a result of the exponential increase in information, ambiguity, emergence, and uncertainty.

The adoption of organization development science, theory, practices, and values is therefore essential in crystallizing the future governance model and enhancing the effectiveness of corporate boards. There is therefore need to devise methods to ensure that boards understand what the nascent organization development tools and techniques bring to organizations. Organization development is essential in addressing the challenges of fragmentation, instability, diversity, and so on within organizations. Boards should therefore adopt and implement the nascent organization development techniques in order to enhance organizational effectiveness. In view of the pervasive nature Artificial Intelligence (AI) boards should start using nascent applications that come with AI in order to improve decision making. To provide strategic thinking and strategic leadership in turbulent times, corporate leaders should diagnose and identify their specific needs and deploy appropriate change management plans. The main justification for the necessity of organization development in corporate governance is the constancy of planned or emergent change.

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Justine Chinoperekweyi, PhD, serves as the Director: Academics & Programs at the Centre for Organization Leadership & Development (COLD) Harare, Zimbabwe. He is the Lead Instructor of OD modules such as, Fundamentals of OD, Appreciative Leadership in OD, Methods of Inquiry in OD Practice, OD Tools & Techniques, and Corporate Governance. Chinoperekweyi is also the Managing Editor of the *Organization Leadership & Development Quarterly* (OLDQ); and an Academic Director and Visiting Faculty in United Arab Emirates. He can be contacted at justine@centreold.com.

Leadership Development

A Blueprint for Building a Coaching Culture

By Debra Hamilton

In a highly volatile, uncertain, ambiguous environment, leaders face more information, constant change, and intense time pressures leaving them running at high adrenaline and high momentum with little time to think, strategize, and lead. How does a leader reconcile what is truly important? What is the path for leadership development? And how do internal learning and organizational development practitioners support the growth of leaders? While no one set of answers may exist, one fact is certain: despite this more challenging environment, leaders are being asked to execute at higher levels of complexity and change.

The Center for Learning & Talent Development at Fulton Financial Corporation (FFC) was curious about how to best enable successful leader performance, and we set out to identify the most critical development needs for our leaders. The team conducted interviews with senior leaders and HR Business Partners, reviewed data from employee engagement surveys, and outlined what was working and what was missing. Hidden in the interconnected complexities and pressures facing our leaders, surfaced a primary role that all leaders play—that of being an effective coach. The themes we heard kept pointing to coaching as a primary lever for leadership and organizational success. Coaching was already being done by our Consumer and Commercial business line sales leaders; however, our senior leaders were interested in quality coaching performed consistently across the organization.

We defined coaching as an interactive dialogue between manager and direct report, the goal of which is to explore growth, deepen learning, and unlock an employee’s potential toward the achievement of individual, team, and organizational goals. The types of coaching conversations important to leadership at FFC range from the annual performance review, to coaching-in-the-moment, to stay interviews. There is a well-known adage worth repeating: if meaningful coaching is occurring throughout the year, there should be no surprises at the annual review. A number of day-to-day coaching opportunities exist to support the annual performance review, such as: taking on a stretch assignment, establishing new direction, building new skill sets, and navigating through change. The stay interview further contributes to trust building between the manager and employee. This type of coaching conversation can be a powerful way to address important topics and learn worthwhile information that may not surface in day-to-day coaching.

Championed by our senior leaders and HR Business Partners, our opportunity was to make coaching a foundational skill for all 800+ leaders and managers across the enterprise. We asked, how does a manager make the transition to coaching? What is most challenging about this? Most important, if we assume that coaching is a key aspect of every leader’s role, how do we prepare leaders to build coaching competence and what is the impact? This article presents two case studies on preparing leaders and managers to become effective coaches

Table 1. *Fulton Financial Corporation Values*

Change We innovate by continuously learning.	Collaboration We work together. We win together.
Customer Focus We Care, Listen, Understand, and Deliver.	Ethics & Integrity We do what is right.
Performance I own my results.	Organizational Health We bring positive energy to all we do.

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while building coaching competence into the culture—ideally, we envisioned leadership development as the blueprint for building a coaching culture.

Background

With roughly 3,600 employees, Fulton Financial Corporation is a regional financial services holding company headquartered in Lancaster, PA. In the shadow of the 2008 global financial crisis, the company, like most financial institutions, became mired in regulatory reform. During this time, senior management wanted to focus on boosting the spirit and performance of all employees, so they turned to culture, knowing that successful companies shape their cultures instead of allowing their cultures to shape the company. While the current culture was not broken, senior management wanted to fortify a healthy, high-performing culture. As such, the company worked with a vendor, Senn Delaney, to implement an enterprise-wide culture-shaping program. The program provided an opportunity to reset the company's purpose statement and core values—distilling eleven company values down to six core values and guiding behaviors (see *Table 1*). One of those values is “Performance: I own my results.” At the same time, the company's CHRO had a plan to more formally measure employee engagement. The focus on performance and engagement became the catalyst for building a coaching culture so that coaching would become the preeminent way of leading and managing throughout the organization.

Why Focus on Coaching?

Great leaders inspire, coach, and develop others. Through skillful coaching, leaders create a culture of learning and empowerment. Zenger and Folkman (2014) report empirical evidence that echoes myriad studies in finding that effective coaching raises employee commitment and engagement, productivity, retention rates, customer loyalty, and subordinate's perception of the strength of upper-level leadership. Gallup organizational research indicates that a significant portion of the variance in team engagement is explained by the quality of the manager or team leader and that coaching plays a role in improved scores; team leaders influence whether workers are able to use their strengths to do what they do best, give team members recognition for good work, and hold ongoing conversations to coach their employees (Harter, 2018).

According to Dr. Kelly Monahan, Talent Research Lead Senior Principal with Accenture, organizations still rely on autocratic leadership methods. With technology moving at a pace beyond what humans can adapt to, *social capital* (interpersonal skills, connections) is the new currency in the future of work where higher levels of trust and collaboration are needed. Leaders who use coaching will facilitate deeper connections and the growth of social capital (Monahan 2019).

Research conducted by the Human Capital Institute (HCI) and the International Coach Federation (ICF) points to a business case for a strong coaching culture: employee engagement in organizations with a strong coaching culture is 12%

higher than other organizations (Filipkowski, Heverin, & Ruth 2016).

A global survey conducted by *Harvard Business Review* and SuccessFactors found that 1,400 millennial respondents wanted more feedback from their managers. In fact, millennials said they desired this type of one-on-one contact 50 percent more than their colleagues of different ages. They would also like to meet with their manager(s) once a month for a discussion on their personal progress (Landrum, 2018). Furthermore, when coaching skills are integrated into a leader's daily practice, it sends a loud and clear message that “I care about you. I care about your future. I care about your growth. I'm here to create a climate in which you blossom and flourish (Kouzes & Posner, 2003, as cited in Goldsmith, 2012).”

Hard financial benefits (e.g., increased productivity and quality), intangible benefits (e.g., improved relationships, teamwork and job satisfaction), soft benefits (e.g., decreased stress and increased resilience/well-being and engagement) and behavior change (e.g., better time management, faster onboarding, and better decision making) have all been observed as a result of coaching in organizations (Filipkowski, Heverin, & Ruth 2016, as cited in Trenner, 2013).

The quantifiable impact of coaching is often seen more dramatically in sales results. Teams that receive fewer than two hours of coaching per representative per month achieve 90% of goal. In contrast, managers who deliver three or more hours of coaching per representative per month see performance rise to 107% of goal (Corporate Executive Board, 2007).

As coaching has taken hold in organizations, a big question remains: individual coaching is great, but how can we deliver its benefits to the whole organization (Hawkins, 2012)? Peter Hawkins, who has spent more than 30 years helping organizations transform their cultures, shares his aspirational definition of a coaching culture: “A coaching culture exists in an organization when a coaching approach is a key aspect of how the leaders, managers, and staff engage and develop all their people and engage their stakeholders, in ways that

create increased individual, team, and organizational performance and shared value for all stakeholders (Hawkins, 2012)."

Start with a Coaching Mindset

With our objective of building foundational coaching skills for all leaders and managers, the first order of business was to create the mindset for coaching. While coaching is one way for managers to improve engagement and boost productivity, many managers don't see coaching as an important part of their role, attributing either a

of learning and growth and discern that coaching is not something that is done *to someone* but rather done *with someone* to build trust and achieve results. According to researcher and psychologist, Carol Dweck, a fixed mindset creates an internal monologue that is intent on judging, whereas a growth mindset generates a curiosity that is focused on learning (Dweck, 2006). When applied to coaching, the leader with a fixed mindset might say, "That is not how we do it here," and the leader with a growth mindset might say, "How else can we look at this?" Manag-

Coaching, like many other requisite leadership skills, does not come naturally to most leaders and requires a genuine interest in helping others to learn and develop—the soft skills of the job—which are actually quite hard to master. Consequently, training managers to be effective at coaching is important, even if overlooked by many organizations.

lack of time or lack of skill for their disinterest (Valcour, 2014). For many managers, and for Fulton's leaders, it comes down to the "player-coach" mindset and the struggle to balance leading with doing. How much should leaders roll up their sleeves, act as "players," and produce great work themselves? How much should leaders serve as coaches, engage with employees, and inspire them to produce great work (Murphy 2016)?

According to Weintraub and Hunt, (2015), managers who coach their direct reports believe in the value of coaching, it is core to their coaching mindset, for four reasons:

- » They see coaching as an essential tool for achieving business goals.
- » They enjoy helping people develop.
- » They are curious.
- » They are interested in establishing connections.

Without a focus on mindset, the role of coaching can be somewhat vague and mysterious, so it was important for Fulton's managers to view coaching through a lens

of learning and growth and discern that coaching is not something that is done *to someone* but rather done *with someone* to build trust and achieve results. According to researcher and psychologist, Carol Dweck, a fixed mindset creates an internal monologue that is intent on judging, whereas a growth mindset generates a curiosity that is focused on learning (Dweck, 2006). When applied to coaching, the leader with a fixed mindset might say, "That is not how we do it here," and the leader with a growth mindset might say, "How else can we look at this?" Manag-

ers with a growth mindset are agile and curious and will ask questions to explore a spectrum of possibilities, often empowering employees to come up with their own solutions and then showing gratitude for what is working. Such curiosity leads to valuable insight and wisdom.

Mindset is what helped Fulton's leaders embrace the company's core values and culture concepts and make the transition to coaching. For instance, one of the culture concepts, "be here now" encouraged managers to move beyond surface-level conversations and build deeper connections and trust with direct reports. Mindset helped to move coaching from the fixed position of "telling" to an open partnership of "asking" and empowering—while still holding others accountable for results. As Hunt and Weintraub advocate, coaching is a relationship-based activity (2007, p. 59) and managers have to possess a clear, almost line-of-sight ability to see that taking some time to hold a work-related coaching discussion is not a distraction from the tasks at hand and is not driven by the desire to be nice (Hunt & Weintraub, 2007, p.17).

The Need to Build Coaching Skills

Most managers and leaders are promoted because of their technical competence or functional expertise, and once promoted, find themselves naively wearing many new hats with little or no development on how to succeed in their "new normal." As Roger Delves puts it, "they are accidental leaders" (2018). They are given the responsibility, but often not the support. They receive the title, but often not the training (Delves, 2018). Coaching, like many other requisite leadership skills, does not come naturally to most leaders and requires a genuine interest in helping others to learn and develop—the soft skills of the job—which are actually quite hard to master. Consequently, training managers to be effective at coaching is important, even if overlooked by many organizations. Eighty-seven percent of HCI & ICF survey respondents in organizations with strong coaching cultures report that their current training for managers/leaders has been instrumental in building those cultures, compared to 43% of all other respondents (Filipkowski, Heverin, & Ruth 2016). One respondent from the HCI & ICF (2016) research stated, "Managers do need to know the distinction between coaching (empowering an employee to find their way) versus directing (requiring specific actions) or supporting (letting a person drive and be there as needed) an individual."

Case Studies

The two case studies describe our approach to building coaching competence across the organization to achieve breadth—*all people managers*—and depth within a major business line. Both demonstrate a partnership between FFC's Center for Learning & Talent Development and an external leadership coach practitioner to co-design and facilitate acquisition of coaching skills using a variety of learning modalities. More than just a workshop, these programs were established to reinforce culture concepts, develop and elevate leadership capability, and stretch across the enterprise to improve employee engagement.

FULTON MODEL

CONTEXT

Goal, opportunity, or situation to be explored. What do you want to discuss? Why is it important?

OPEN DIALOGUE

Seek and share information about the situation; compare perceptions, ask questions, listen, check for understanding, agree on the gap or opportunity, and explore solutions.

AGREEMENT

Agree on a solution and specific action steps; consider/remove barriers or obstacles; identify roles, responsibilities, and timeframe.

COMMITMENT

Summarize and confirm, raise the value of being accountable; create line of sight to operations and business strategy (reference development plan as appropriate).

HIGH NOTE

Set positive expectations and appreciate the time investment; strengthen the relationship/trust.

RESPECT & TRUST

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FEEDBACK

RELATIONSHIPS

proprietary COACH model (Figure 1). COACH provides a simple and repeatable structure for having a results-focused conversation: Context; Open dialogue; Agreement; Commitment; High-note. This positioned coaching as a non-negotiable leadership skill that would deepen the relationship and trust between a manager and direct report, increase employee engagement, and improve results.

To teach the COACH model, we designed a Coaching & Feedback for Results program that encompassed several learning modalities, shown below.

- » **Prework:** To prepare for the program, participants scripted a real life coaching scenario using a Coaching Conversation-Planner template. This exercise would become the focal point for the role play during the program.
- » **One-and-a-half-day Workshop:** Co-designed and led by an external leadership coach practitioner, the course objectives included: coaching presence, giving feedback, asking purposeful open-ended questions, CAPS active listening model: Clarify, Acknowledge, Probe, Summarize (Morgan, 2016), and managing resistance—all skills were aligned to the COACH model.
 - **Role Playing:** In teams of five, participants gained practice through 5:1 coaching role play rounds. Roles included one trained internal facilitator at each group acting as the employee, one participant in the manager role (delivering the coaching), and the remaining participants in the observer role.
 - **Feedback:** Each group completed five rounds of coaching practice, with self, observer, and instructor feedback to strengthen learning.
- » **Action Plan:** Each participant completed a “stop/start/continue” action plan to set the stage for learning transfer.
- » **Post-Program Assignment:** Within 30 days following the workshop, each participant was asked to (1) conduct three one-on-one coaching conversations using the new tools and (2) schedule a one-hour Coach-the-Coach session

Figure 1. Fulton COACH Model

Case Study #1 Achieving Breadth—Foundational Coaching Skills for All Managers

Opportunity

Amidst an enterprise-wide culture-shaping initiative, FFC’s Center for Learning & Talent Development was charged with building a culture of coaching. From the 2016 engagement survey, 67.3% of employees agreed “my manager regularly gives me feedback on my job performance,” and 61.7% agreed “my manager effectively coaches me through structured one-on-one time.” These results represented opportunities to more effectively engage, develop, and retain employees through coaching. Yet, how would we train some 800 managers to adopt a growth mindset and become better coaches? More important, how would coaching become the way we

lead and ultimately, the way we do business across the enterprise?

The three key objectives of the initiative were to:

- » Increase the frequency of coaching conversations
- » Improve the quality of the dialogue and outcomes
- » Embed our culture-shaping behaviors into the language and practice of coaching

Furthermore, we wanted an enterprise solution that would be actionable and sustainable up, down, and across the organization for leaders at all levels.

Solution

After assessing needs, studying numerous coaching models, and drawing on our team’s expertise, we developed a

Table 2. *Coaching & Feedback for Results — Program Metrics*

Workshop Attendance	Over a two-year period, a total of 794 participants attended: 687 exempt managers and 107 nonexempt supervisors.		
Participant Feedback using Metrics That Matter (MTM)	<ul style="list-style-type: none"> • 88% of participants who attended agreed that the “program will improve my ability to be an effective leader.” • 90% who attended agreed that the “program will have a significant impact on increasing employee engagement.” 		
Post-Program Assignment	Each participant was asked to conduct three one-on-one coaching conversations using the new tools within 30 days of the program; 97.3% of participants reported completion.		
Coach-the Coach Session	<ul style="list-style-type: none"> • 75% of exempt managers attended the post-program session and reported an increase in coaching confidence from an average of 5.6/10 before the program to 8.0/10 after program. • This represented an increase of 2.4 points which equates to a 43% lift in confidence. 		
Engagement Survey Results	Employee engagement improved. Over the span of the program, we tracked two specific engagement survey items, shown below.		
	ENGAGEMENT SURVEY ITEMS MEASURED	2016	2018
	My manager regularly gives me feedback on my job performance.	67.3%	72.8%
	My manager effectively coaches me through structured one-on-one time.	61.7%	71.4%

with the external leadership coach practitioner to practice a real-world coaching situation.

- » **Reinforcement:** We launched a Leader’s Toolbox on our internal Share-Point site to include the coaching tools, templates, articles, and links to TED talks. We connected these resources to our Sales Management Toolkit which contained coaching job aids on team huddles, joint calling, and pipeline management.

Evaluation Framework and Results

Within a two-year timeframe, the company went from only the sales side of the business conducting coaching to an enterprise COACH model that now fosters both formal and informal coaching across the organization. The idea of coaching, previously regarded by some as punitive performance improvement, came out of the shadows as a valuable practice for employees to learn, grow, and develop. The metrics shown in *Table 2* indicate an increase in coaching conversations, higher manager confidence in coaching, and higher

engagement scores demonstrating improved coaching outcomes.

**Case Study #2
Achieving Depth: The Leadership Journey for Commercial Sales Leadership**

Opportunity

Commercial Market Executives, a senior sales leadership team, wanted to manage their markets with a broader, enterprise mindset. As a team they needed to be regarded as the “influencers” to more strategically deliver on their new segmentation model. The primary learning needs included:

- » Creating a player/coach balance to lead more readily at the enterprise level and drive business growth
- » Establishing leadership team norms to uniformly inspire high-performance across the business line
- » Coaching their teams along the change commitment curve to fully adopt the segmentation model
- » Coaching to the sales model with more skill and authenticity to reduce

- » dependency on the manager to jump in and take over
- » Replacing old mindsets and overlearned behaviors with more thought leadership and versatility
- » Engaging in peer-to-peer coaching networks to broaden thinking

A strong partnership was forged with business line leadership, an external leadership coach practitioner, and FFC’s Center for Learning & Talent Development to create a leadership journey for the cohort of 30 leaders that would deepen the coaching culture and demonstrate increased leadership capability—*helping leaders to lead at the right level.*

Solution

As a starting point, we built a series of four leadership retreats—each formatted as a one-day workshop spread over an 18-month timeline with interim work. The leadership journey encompassed several learning modalities, tools, and theories summarized in *Table 3*. In the first workshop, we facilitated a SPOT analysis (Strengths, Problems, Opportunities, and Threats) which set the stage for robust discussions on change, leadership team norms, high-priority projects, and coaching best practices.

Next we administered the Hogan Leadership Forecast assessment which provided themes on strengths and development areas for each individual. To gain a holistic view of team strengths and derailers, we ran the Hogan Team Report. From this, for example, we learned that leaders were steeped in tradition and highly risk averse. Not surprising for a financial services firm. This finding helped us to design learning exercises to help leaders step out of their comfort zones and think more strategically.

We followed the Hogan with the Leadership Versatility Index® (LVI) 360-Degree Feedback Instrument. This provided a 360 view of each leader’s versatility and where they needed to achieve more balance. For instance, the LVI uses a “too little/too much” rating scale to provide specific feedback about what a leader should do more—or perhaps less—to be more effective. Leaders gained new perspectives on how to focus time and energy on the right things.

Table 3. Highlights of 18-Month Leadership Development Program

COMMERCIAL SALES TEAM LEADERSHIP DEVELOPMENT PROGRAM DESIGN <i>Program Outcome: Lead with a broader enterprise mindset to more strategically deliver on results</i>	
<i>Phase of the Program</i>	<i>Theories and Tools Covered</i>
Prerequisite	<ul style="list-style-type: none"> • <i>Coaching & Feedback for Results Workshop</i> (1.5-day program)
Leadership Retreat #1 <i>Full day—offsite</i>	<ul style="list-style-type: none"> • <i>SPOT Analysis Exercise</i> to identify leadership and business growth opportunities • <i>Change Commitment Curve Analysis</i> • <i>Leadership Team Norms Exercise</i> • <i>Coaching Opportunities and Practice Rounds</i>
Interim Work—Hogan Leadership Assessment	<ul style="list-style-type: none"> • <i>Hogan Leadership Forecast Survey</i> • <i>Face-to-face Debrief with Facilitator/Coach</i> • <i>Guided Reflection Exercise</i>
Leadership Retreat #2 <i>Full day—offsite</i>	<ul style="list-style-type: none"> • <i>Peer Coaching Groups</i> to share insights from Hogan Assessment data • <i>Hogan Team Report Analysis</i> • <i>Leadership Roundtables</i> to expand thinking on critical leadership practices • <i>Coaching Practice: Powerful Coaching Questions</i> • <i>Daily Reflection: Small wins, insights, and priorities</i>
Interim Work—LVI 360-Degree Feedback Instrument	<ul style="list-style-type: none"> • <i>Leadership Versatility Index® (LVI) 360 Survey</i> • <i>Executive Coaching Program: 5 Coaching Sessions</i> • <i>Leadership Development Plan</i>, presented to manager
Leadership Retreat #3 <i>Full day—offsite</i>	<ul style="list-style-type: none"> • <i>Power of Small Wins</i> to share coaching successes • <i>Visual Exploration Exercise: Reflect on your leadership journey; share insights, shift in mindset, behaviors, and results</i> • <i>Neuroscience of Strategic Leadership/VUCA</i> • <i>Peer Coaching Groups</i> to discuss leading at the enterprise level and apply to high-priority ventures • <i>Daily Reflection: Small wins, insights, and priorities</i>
Leadership Retreat #4 <i>Half day—offsite</i>	<ul style="list-style-type: none"> • <i>Leaders As Teachers: Capstone Exercise</i> <ul style="list-style-type: none"> • <i>Group 1: Player/Coach Mindset</i> • <i>Group 2: Strategic Balance</i> • <i>Group 3: Transformational Coaching</i> • <i>Group 4: Leading through VUCA</i> • <i>Journaling: What have you learned about yourself as a leader? What is your focus area or “next practice” in leading self-team-enterprise? Write your six-word leadership story.</i>

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Throughout the program, we introduced self-reflection and journaling as a form of mindfulness and used insights from Harry Kraemer, clinical professor of strategy at the Kellogg School and former CEO of Baxter International. “Instead of constant acceleration,” Kraemer says, “leadership demands periods of restraint and consideration; productivity demands self-reflection (Kraemer 2016).” The journaling prompts centered on how leaders can prioritize what’s important, coach more effectively, and build stronger teams—basically how to slow down in order to speed up.

The program also aimed to bring the leaders together as peer coaches; this provided another setting for practicing coaching skills. Peer coaching groups were formed to provide a way of slowing down momentum, exploring critical challenges, and holding each other accountable for exploring the right next answer. Peers assumed the role of a coach: Asking questions to explore solutions (“What are your options?”); reflecting back and questioning assumptions; providing observations (“I am sensing you are really stuck on this.”); and listening with positive intent, while suspending judgement and advice.

Intangible Benefits and Impact of the Program

Six months after the leadership journey concluded, we invited participants to share their best practices and the impact of the program. Here is what they said.

- » **Use Two-way Dialogue**—“I continue to hold regular coaching sessions with my teams. The focus is not to have a one-way conversation but to create a two-way dialogue to dig into any issues or roadblocks that the RMs are experiencing.”
- » **Listen**—“It obviously sounds simple, but listening is a learned behavior that you have to really focus on. “Be here now” and “be present” are phrases I am always repeating to myself.”
- » **Ask Questions**—“Get a deeper understanding of what the issue might be with an individual. Well-thought-out questions allow you to gather so much more information than you

would have received by just reacting to the situation.”

- » **Don’t Enable**—“Too many times in the past people would come to me and ask me what to do, and I would solve the problem for them. This does not help their problem-solving abilities and it hurt me from a time management perspective. I changed by asking them questions, and helping them think through their own issues. Fast forward a year or so—most people come in to my office with an ideas of how to attack a problem or opportunity.”
- » **Transparency**—“The process of going through my Hogan and completing the 360 was very beneficial. I shared my feedback with my team and told them I am working with an executive coach. I shared that this commitment to investing in our talent shows that Senior Management is serious about coaching and committed to coaching and career development.”
- » **Peer Coaching**—“This has helped to strengthen ties among our current and future leaders, connecting folks who would normally not be interacting, given our ever-expanding footprint, our vertical lines of business, and our unique geographic markets.”
- » **Consistency**—“Using a consistent coaching process has helped to create better expectations and engagement; valuable information is discussed during coaching sessions that would not happen otherwise.”
- » **Strategic Thinking**—“During coaching sessions, we are thinking more strategically about problem solving, generating more business, and navigating processes or personnel. This has opened up the space to address wins, challenges, and opportunities.”
- » **Career Development**—“I’m having more meaningful career development conversations with the team which is leading to a higher level of employee engagement and offering more leadership opportunities for my team.”
- » **Leadership Development Plan**—“I personally have already benefited greatly from having an executive coach. I’ve built a leadership development plan

and have already executed several initiatives.”

- » **Engagement**—“Fortunately, my Hogan and 360 feedback tied nicely to areas of opportunity noted in my team’s employee engagement survey. I’ve tied the two together and have begun making changes that have been welcomed by the team.”
- » **Team Meetings**—“I have started to intertwine coaching into our team meetings, so that coaching is always a part of how we work together both one-on-one and as a group. I am also trying to ask for more feedback on myself so that everyone knows coaching goes both ways and I’m open to getting better just like everyone else.”

Lessons Learned

Like most complex learning and organizational development programs, we identified ways we could have strengthened the program:

- » Build stronger business line metrics up front, for example, increase in customer satisfaction or average sales per person. While we did measure participants’ feedback on the training and collected qualitative post-program data, we did not have an approach to measure business line results or ROI.
- » Create an actionable and sustainable reinforcement plan to transfer the learning to real-world behavior change. While we had some blended learning components and follow-through, we also would have preferred to engage participants’ managers in the process—before, during, and after. This would keep managers more accountable to the change and transfer process.
- » Survey the participants’ direct reports at the 30- to 60-day mark to learn if coaching conversations were taking place and understand the quality of those conversations and outcomes from the direct report’s experience.

Implications for Organizations and OD Practitioners

Among all of the roles that a leader must play, coaching is pivotal to building

relationships, developing people, building high-performing teams, improving productivity, leading change, and achieving results. Starting with the tone at the top, and through innovative leadership development programs that are actionable and sustainable, coaching has the power to become the way of doing business. It is a mindset and a journey that requires careful planning, perpetual skill building, and strong senior leadership buy-in. Too often managers are not provided with the time and focus to conduct effective coaching. In some cases the manager's span of control is too large. Under the frenetic pressures of day-to-day operations, coaching gets watered down to providing updates and reactively solving problems. On the contrary, coaching is a partnership between the manager and the coachee—this requires deepening trust, slowing down, and opening up the space for transparent conversations. Similarly, the coachee needs to be willing to be coached; in fact, Hunt & Weintraub say, when it comes to learning, the coachee, not the coaching manager, is in the driver's seat (Hunt & Weintraub, 2002). It is in this space of coaching where tough problems can genuinely be understood and addressed through mutual learning, the growth mindset, and with a sense of empowerment. It is where great leaders can create the conditions for others to flourish.

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Debra Hamilton is the Chief Learning & Development Officer at Fulton Financial Corporation in Lancaster, PA, with 25 years of expertise in talent management and leadership development. Prior to joining Fulton, Debra was at the Children's Hospital of Philadelphia, where she founded and managed the CHOP Leadership Institute. She also spent 15 years as a learning and leadership consultant designing programs for a global clientele. She has served as Board President for the Northern New Jersey chapter of The Association for Talent Development (ATD) and was a member of the Penn State Training & Development Advisory Board. She has a Bachelor of Science in Business Education and is earning a Comprehensive Evidenced-Based Coaching Certificate from Fielding Graduate University. She can be reached at: DHAMILTON@fult.com.

“Transformation happens when the being of the system, and the people who form that system change. When people realize that *we are not here to change others or the entity called organization or community. The change is us, we have to change.*”

Drench — Living the Dream Before Action

A Crucial Stage in the Practice of Appreciative Inquiry

By R. Sankarasubramanian
and Dr. Wasundhara Joshi

Appreciative Inquiry was born as a doctoral dissertation by David Cooperrider working under his guide, Suresh Srivastava, at the Case Western Reserve University in the 1980s. The impetus for Appreciative Inquiry to become a popular change management and organization development model and practice came from the development of the 4-D model, followed by the 5-D model.

We propose that between the expansive and possibility infused phase of discovery and dream, and the action oriented phase of design and destiny/delivery, there needs to be a pause, a time of inaction before the action, a sixth D. There is a need to completely *Drench* in the dream to let the new imagined world soak into the system, embody the same, and then move into action to generate ways to live the dream. This phase of *inaction* is an important determinant to the quality of the actions in the design and delivery phases that ensue.

Background of Appreciative Inquiry

“More than a method or technique, the appreciative mode of inquiry is a means of living with, being with, and directly participating in the life of a human system in a way that compels one to inquire into the deeper life-generating essentials and potentials of organizational existence.”

—David Cooperrider

The publication of the article “Appreciative Inquiry in organizational life” by Suresh

Srivastav and David Cooperrider (1987) shifted AI from being a theory to a way of understanding and bringing change in organizations and communities.

Appreciative Inquiry was groundbreaking, going beyond the problem or deficit focus that was the prevalent model for change in those days. Appreciative Inquiry was based on the concept of *multiple realities* and *generativity* as articulated by Kenneth Gergen in his theory of social construction (1982).

David Cooperrider and Suresh Srivastava developed the core principles of Appreciative Inquiry in the early 1990s, which described the basic tenets of the underlying AI philosophy. Along with the core principles, the Model for Appreciative Inquiry as a change management approach also evolved. The impetus for Appreciative Inquiry to become a popular change management and organization development model and practice came from the creation of the 4-D, and later the 5-D model. Many papers have been published over the last few decades on Appreciative Inquiry using the Model.

The Model

There is no clarity about how the Appreciative Inquiry model really came into being. According to the website, <https://appreciativeinquiry.champlain.edu>, Suresh Srivastava, David Cooperrider, and Ron Fry worked with the health systems in Romania as part of the Social Innovations in Global Management Project, 1989

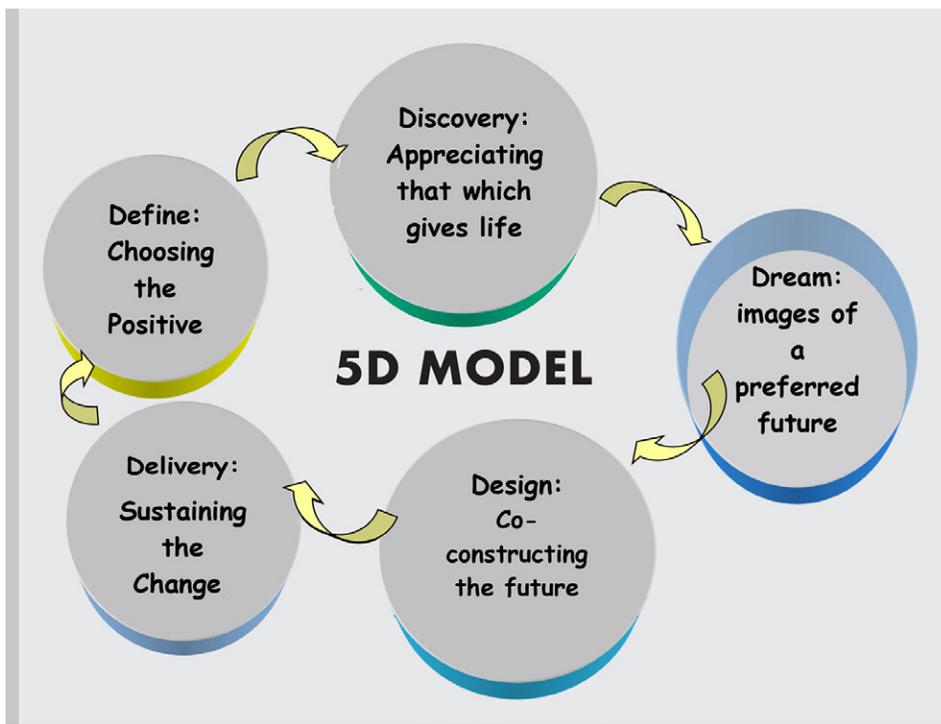


Figure 1. The 5-D Model

(SIGMA) and generated a 3-D model that had “discovery, dream and destiny.” The 3-Ds were transformed to 4-Ds, adding the “design” phase during the Global Excellence in Management Initiative (GEM) project done in the 1990s. According to AI Commons, Rob and Kim Voyle transformed the 4-D into a 5-D model for organization development adding “Define” as the starting point of the model. They also acknowledge the contributions of Bernard Mohr in the development of the model (www.voyle.com).

Appreciative Inquiry practitioners all over the world have embraced this 5-D model (Figure 1) as the most practical and energizing approach to applying Appreciative Inquiry for individual, organizational, and societal change initiatives.

5 D MODEL

D: Clients more often than not, approach us with problems and the task of the Consultant is to help them “reframe” the problem statement into a possibility that the client really desires. The 5-D starts with the premise that *what we want to focus on becomes our reality*. So we do not focus on the problem. The Define phase clarifies the project’s purpose and content and what is

the desired future; “What generative topic do we want to focus on together?”

2nd D: The next step in Appreciative Inquiry is to “inquire” into that topic by recounting stories of when they experienced the topic of inquiry, when it worked. This is called “Discovery.” It operates on the assumption that what we want already exists in the client system and is just waiting to be discovered.

3rd D: The Dream in Appreciative Inquiry is an amplification of the themes from the story; imagining how it will be when we live at our best all the time, how we can be as an organization. The Dream is stated as a “provocative proposition” which is written in present tense.

4th D: The next phase of Design determines “*what and how* it should be.” Design is a process of dialogue and brainstorming to determine how the future can be brought into the present.

5th D: The last stage of the 5-D cycle is Delivery (some of us like to call it the more poetic “Destiny”). The Delivery phase output are a set of action plans that are set into motion that the system believes will take it towards the desired future.

While the above is a general understanding of the 5-D model, different consultants of Appreciative Inquiry implement this differently and also customize it to the requirements of the situation.

DRENCH, The 6th D

“Be the change that you want to see in the world”—M K Gandhi

Appreciative Inquiry is celebrated because it has the power to allow the change to be transformational. There are also many case studies where this falls short, the change is more transitional and not transformational as it was originally intended (Bushe, 2005).

The authors suggest that some of this may be a result of an unwillingness to “Be the Change” that is required for transformation, because transformation is not simply a function of changing structures and processes. It is not something you do to a system. Transformation happens when the being of the system, and the people who form that system change. When people realize that *we are not here to change others or the entity called organization or community. The change is us, we have to change.*

In our experience, a key to this is an additional step, not yet named in the 5D model. A step that allows the non-dual nature of change to sink in and allows the emergence of new realities that may be very different from the initial definition of the project.

We propose that we add “Drench” to the cycle of Appreciative Inquiry after Dream and before Design. Drenching is to soak in the Dream. Drenching is standing in the rain and allowing raindrops to seep into each pore of our skin, it is allowing the magnificent sunrise to embrace our whole being with the golden light as the dream emerges. To Drench is to stay in the energy of the dream, to “*just be*” and suspend all actions. Drench is counter-intuitive. In a world that applauds fast and decisive action, Drench proposes inaction. In a world where clarity is important, Drench asks that we remain in a hazy state.

The Case for Drench

Drench and Subject-Object Dualism

Most change efforts in organizations focus on an “object” that needs change and the there are people (subjects) who make that change happen. In this approach, the assumption is that the people who are initiating change have no need to change, they are here to change others, change systems, processes etc.

From a subject-object dualism (Aguar & Tanelli, 2018) lens, the change agents see “individuals,” “people,” “organization,” and/or “the leadership” as entities that exist separately from them. Appreciative Inquiry through the processes of “Discovery” and “Dream” attempts to break this duality. The power of storytelling in the Discovery phase and the energies unleashed by the Dream phase helps the participants to move from the split of duality to an understanding of the relational nature of the changer and the changed. It is no longer that we as individuals are changing the organization, *but by our changing, the organization changes*. This realization requires some time to sink (or *drench*) in. This is also when a new consciousness dawns which can lead to transformation.

This experience of “non-duality” at the stages of Discovery and Dream needs to be preserved and amplified. Unless we do that, we tend to quickly converge into something actionable within the familiar mechanical mindset. The design in this case becomes the product of known frameworks from the older state of consciousness. The danger of moving into a default future is real, and the process of AI will not be transformative. The temptation to change the organization without seeing it in a *non-dual* frame needs to be avoided.

In their seminal paper, “When is AI Transformational,” Gervase Bushe and Aniq Kassam wrote, ‘Highly consistent differences between the transformational cases and the others led the authors to conclude that two qualities of Appreciative Inquiry that are different from conventional organizational development and change management prescriptions are key to AI’s transformative potential: (A) A focus on changing how people think

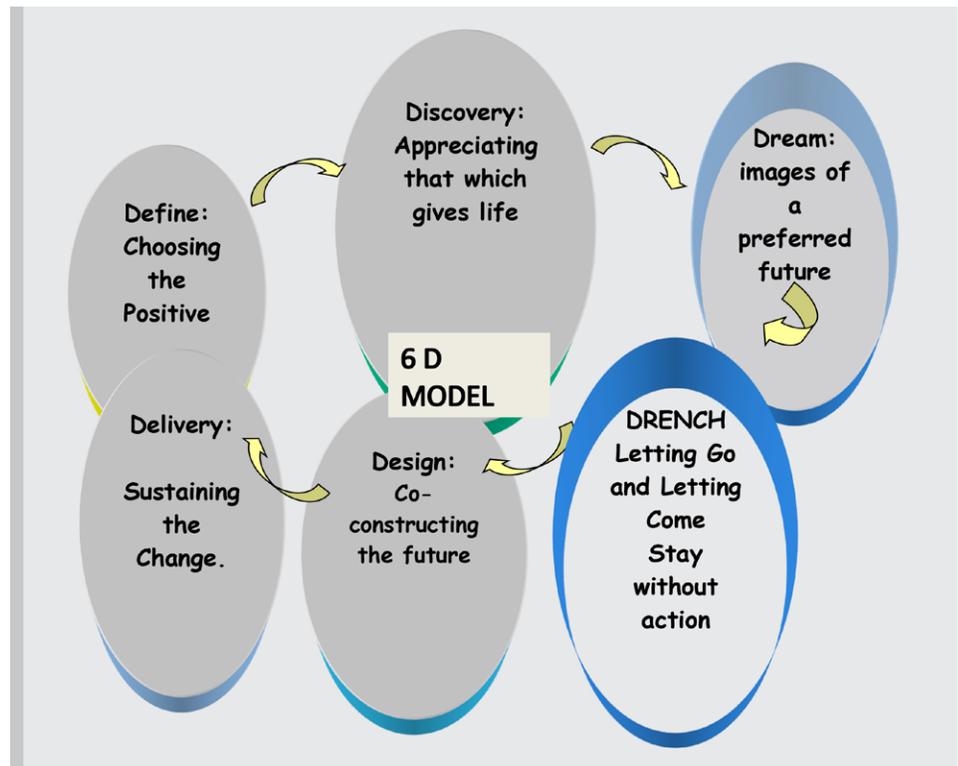


Figure 2. The 6-D Model

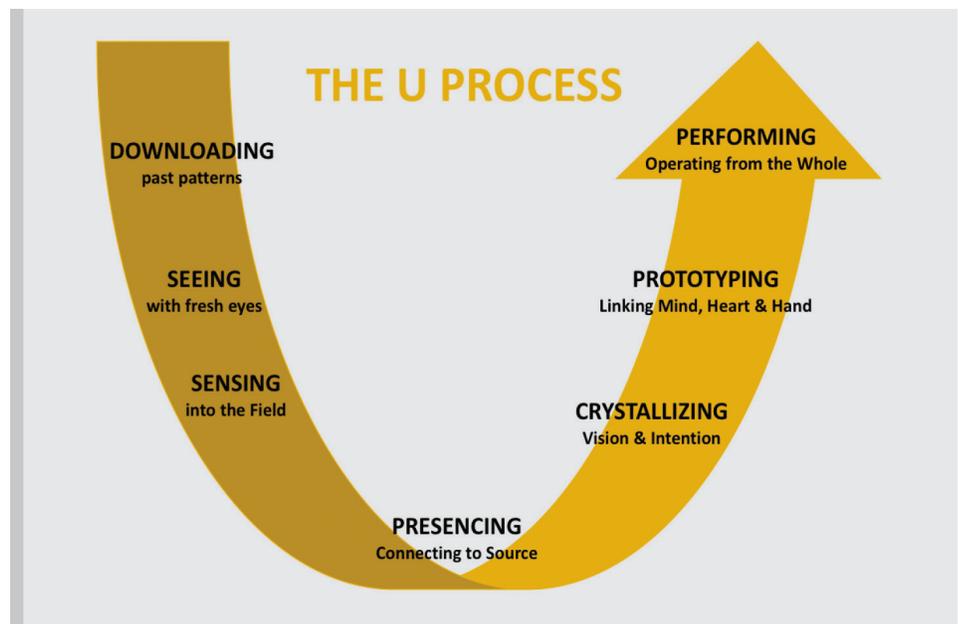


Figure 3. The Theory of U

instead of what people do, and (B) A focus on supporting self-organizing change processes that flow from new ideas’.

In our experience, we have seen that Drenching allows the design and delivery to *emerge* rather than force certain actions from outside like an *action plan*. The decision to act on a dream, to live it in the here and now is not just an act of cognition. It is

also not just an act of passion. *It is a movement of our spirit.*

Drench and Theory U

“Appreciative Inquiry is an articulated theory that rationalizes and reinforces the habit of mind that moves through the world in a generative frame seeking and finding images

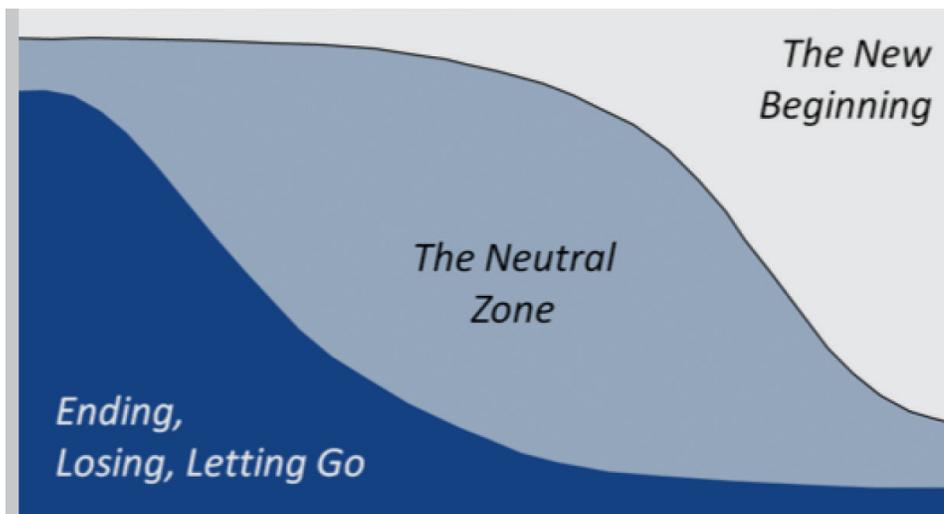


Figure 4. Managing Transitions

of the possible rather than scenes of disaster and despair.”

—Jane M Watkins

Most modern change theories seem to recognize a phase of inaction, a “neutral zone” that is essential to shift the consciousness of the being that will transform and innovate the ways of doing.

Otto Schramer, the creator of Theory U writes about the journey from the left side of the U to the right side:

“On that journey, at the bottom of the U, lies an inner gate that requires us to drop everything that isn’t essential. This process of letting-go (of our old ego and self) and letting-come (our highest future possibility: our Self) establishes a subtle connection to a deeper source of knowing. The essence of Presencing is that these two selves—our current self and our best future Self—meet at the bottom of the U and begin to listen and resonate with each other. Crossing the threshold means to be willing to let go. To let go of old patterns, assumptions, and even our old ego-self.”

The place of “Presencing” in Theory U is similar to the “Drench” phase, the cusp between letting go of the old and letting come the new. The important aspect of this cusp is the “emergence.” This means meditating, waiting, and not forcing the change to happen. Transformative change is possible only when that happens and the mind doesn’t force a certain set of actions

that are anchored in the previous level of consciousness.

Drench and Transitions

“All the greatest and most important problems of life are fundamentally insoluble . . . They can never be solved, but only outgrown. This “outgrowing” proves on further investigation to require a new level of consciousness. Some higher or wider interest appeared on the horizon and through the broadening of outlook the insoluble problem lost its urgency. It was not solved logically in its own terms but faded when confronted with a new and stronger life urge”

—Carl Jung

The concept of “transitions” introduced by William Bridges (1995) is similar to Drench in many ways. Change is what is ‘happening’ and transition is what you are ‘experiencing’. Transition is the “inner change” that one has to undergo to breakthrough the outer change. Transitions begin where the transition itself starts: with letting go of the inner connections one had to be the way things were.

In our experience, we have seen that Drenching allows the design and delivery to *emerge* rather than force certain actions from outside like an *action plan*. The decision to act on a dream, to live it in the here and now is not just an act of cognition. It is also not just an act of passion. *It is a movement of our spirit.*

In his book *Managing Transitions*, William Bridges writes, “In the “Neutral zone” we go through an in-between time when the old is gone but the new isn’t fully operational. It is the very core of the transition process. It is in this flux when we don’t feel comfortable yet. It is the seedbed of the new beginnings that are sought.”

The “Neutral zone” is the space to completely accept the “endings” and retreat from action. This is also the zone to create active imagination and develop “as if” images for future possibilities before embarking into “new beginnings.” Drench is that space of inner transition.

The Drench stories:

We want to share three stories where we experienced the power of Drench in action. These experiences strengthen our belief that Drench is a crucial step in the AI journey.

The first story highlights how the subject-object duality was dissolved when employees began clarifying their own values instead of acting immediately to embed values in organizational processes. The second story highlights the cusp of the theory U where the CEO was letting go of the past and letting come the future. The third story highlights how the “break” from action can bring in a change in mental models of participants, very much like the neutral zone in the transitions model.

Story 1

One of our peak experiences of transformative change was when we worked with a large pharmaceutical services company to create their Mission, Vision, and Values. The whole process of discovery and dream took a few months since we had to

cover about 450 employees. The themes of mission, vision, and values that emerged from these stories were then cascaded to all the employees across the organization's various locations. The design and delivery phases came after that and by then there was tremendous energy to internalize and institutionalize the mission, vision, and values, which have become a driving force for the business.

What we didn't realize at the time, was that there was an extra phase that happened between the Dream and Design. The Mission, Vision, and Values were articu-

The first thing we noticed was how they were sitting together, there was a huddle with some people in chairs, some sitting on the ground and some standing and peering through. It was soothing to hear what people were saying, they were soft, warm, listening, and encouraging each other. When we debriefed the activity later, many people shared that there was a mental shift and a realization that collaboration is not a task to be done but a value to be lived.

lated and presented in an AI summit that included the owners of the company, which was equivalent to the Dream being articulated. For three months following this, it was mandated that small groups of employees discuss the values to understand, clarify and reflect on how they are lived in the organization in the present, or not. Subsequently, teams were formed to embed the values into the various organizational processes. It was a huge success.

This story was published in the *AI Practitioner* (Volume 15, Number 1, February 2013).

Story 2

We consulted with a social entrepreneurship organization in the city of Mumbai, India. Their mission is to provide the best medical care at affordable rates for the poor. We used Appreciative Inquiry to discover their core values. One such value was "happiness." While this value was logically derived from the stories, there was

a feeling that "happiness" is a temporary state of being while the organization was focused on sustained wellbeing.

While working with the CEO of this organization he spoke about his need to go deeper into the meaning of their work. He was willing to meditate on this, and did so for about 30 minutes while we held silence. The word "Joy" emerged. He experienced his whole body soaked with that joy and he could envision how his team and the patients who come to his clinics will be when they experience joy. This led not only to a word change, but a transformation of

the organization. A new spirit emerged with the word "joy" resulting in a change in the way the mission and vision were articulated. The experience of joy became central of what they stood for. Health also meant being joyful, and it applied equally to the organization and to the people they served.

Story 3

This is a story when we were invited to help build collaboration between various departments of another Pharmaceutical company to help with the business goal in reducing the time from "molecule to market." We worked with the top managers of the various verticals to discover times when they collaborated and delivered at their best. This was done in two groups for logistical reasons. So, we had two provocative propositions. Now the task was to arrive at a single provocative proposition that both groups could be energized by. The representatives worked together, the process dragged for hours and we as

consultants realized that the groups were living the exact opposite of what they created as their dream—they were highly competitive instead of collaborating. When this was pointed out as an observation, there was pin drop silence. We suggested that we would take a break and step out of the process. Participants (almost 40 of them) had coffee silently or were speaking in whispers. There was a complete transformation when the group returned to the task and like a miracle they had their common provocative proposition in 20 minutes.

The first thing we noticed was how they were sitting together, there was a huddle with some people in chairs, some sitting on the ground and some standing and peering through. It was soothing to hear what people were saying, they were soft, warm, listening, and encouraging each other.

When we debriefed the activity later, many people shared that there was a mental shift and a realization that collaboration is not a task to be done but a value to be lived.

Drench Practices

We have developed some Drench practices that we find useful. Some Drench practices have a short time frame and some last longer. We list a few below.

- » Asking the participants to sleep over it and come back the next day or after a week and revisit the dream. We can then experience if the energies have diminished or amplified for that dream.
- » Asking the participants to pretend it has happened and to be that person or that organization that was imagined. We set up a simulated environment where client/s walk and talk as a being part of this brave new world. Using theater and other methods of embodiment is powerful.
- » Asking clients to articulate the same dream through different channels of expression- audio, visual, and kinesthetic. This gives a somatic experience for the dream and somatic memory is sometimes stronger than that of the brain.

- » Sharing that dream with five other people and experiencing oneself during the process of sharing and taking feedback on how the other's experienced you during that process can be another powerful way of drenching.
- » Staying in a state of meditation and allowing oneself to fully live that dream is another method of drenching. Here we allow the dream to be fully experienced from all the senses and also connect in the present moment with the dream.

Discussion

Drench is still a new baby in the Appreciative Inquiry world. When we presented this in the World AI conference, 2019 in Nice, France, 35+ practitioners who were present in our session, received it very enthusiastically. Many shared that they have also experienced or facilitated similar steps in their AI journeys but didn't have the language to articulate that. Drench is providing such a language and it is heartening to note that similar thought processes exist in other schools of thought.

We all need to "Drench" in this, experience it, and become one with it before we start to practice it. We want our readers to remember that "Drench" is not what we do to our clients, but we as facilitators of change also drench ourselves. We need to experience this non-duality in ourselves for it to drench our client systems, because we are both one in a non-dual space!

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R Sankarasubramanian, MA, is a past President of the Indian Society for Applied Behavioral Science (www.isabs.org) and a member of the NTL Institute for Applied Behavioral Science, USA (www.ntl.org). He has designed and facilitated OD interventions for corporate and social sector organizations in India and abroad. Currently he is the Director of Change Works (www.changeworksindia.org), consulting in the field of OD, Leadership, and Personal Growth. He can be reached at rsankara@yahoo.com.

Dr. Wasundhara Joshi is a member of the Indian Society for Applied Behavioral Science (www.isabs.org) and a faculty member with Leadership that Works (www.leadershipthatworks.com) for their coaching, certification program. She is an Appreciative Inquiry practitioner, having facilitated AI interventions in corporate, development, and government sectors in India. Currently she is the Director of Change Works (www.changeworksindia.org), consulting in the field of OD, Leadership and Personal Growth. She can be reached at wasundhara@gmail.com.

CASE STUDY

Bad News at Bold Bank

By Therese F. Yaeger and
Peter F. Sorensen

Bold Bank has been a national leader in the financial industry for more than a century. In the last decade, this bank has also become a leader at a global level due to its technological expertise. Recently, Bold Bank announced that it would be one of the early adopters of a new technological breakthrough in the banking industry.

To continue to remain at the forefront of technological success, the Bold Bank executives have agreed to roll out the technological breakthrough ahead of its competitors, claiming that “the expertise in Bold Bank technologies are second to none with cutting-edge technology in finance.”

Benjamin, the President of Bold Bank recently met with the Chief Human Resources Officer (CHRO) Hannah, to identify the best talent in IT that would spearhead this upcoming IT breakthrough. Hannah is well aware of Bold Bank’s recognition in finance and technology, and like everyone else at the bank; she assumed that Bold Bank has the IT staff to support same.

Sadly, Hannah did some HR digging in Bold Bank’s IT department, and found out that people issues in IT were dismal. She then brought the unexpected news to Benjamin and the executive committee. She explained that there has been a 50% turnover in the IT division of Bold Bank in the last six months, and finding the right talent may take some time. Benjamin quickly snapped and reiterated that the critical roll out of the technological innovation “leaves no room for failure or delay,” and to get the best talent on this effort as quickly as possible.

Hannah explores the talent issue with

some remaining IT staff, and finds out that even more Bold Bank employees will be leaving at the end of the month. Hannah, as CHRO, knows that her HR Department is already over-stretched and unable to address the staffing and onboarding requirements as quickly as Benjamin expects. With wisdom from previous staff change issues, Hannah quickly connects with Debbie and Darrell, two talented OD colleagues at Bold Bank with whom she has worked before on internal team building issues.

Initially, Debbie and Darrell are delighted to work with Hannah, HR and the IT Department, but upon further exploration, they realize that their OD work on this effort may be doomed for failure. With early data they learn that:

- » IT doesn’t appreciate OD work, as they think it is games and not “serious IT work” that they do;
- » Debbie feels unprepared to work with this team, as she believes that this is an HR issue of recruiting and hiring;
- » Darrell’s focus has been on coaching the Finance Department executives, and has never worked with IT folks before.

Debbie and Darrell are in need of some OD collegial insights. Is this a doomed OD project? How can OD, Darrell, and Debbie assist the IT Department, the HR Department, and help to make this IT effort a success? We have asked three OD and/or IT colleagues—Kiersten, Ellen, and Dan, for their expert recommendations for Debbie and Darrell at Bold Bank.

Kiersten Rippeteau Responds

Bold Bank is not doomed until you decide it is! Start by letting go of the assumption that this is a hiring issue or that you need experience working with IT folks to help Bold Bank come out on the other side of this challenge in better condition than they were before. The reality is there are endless scenarios that could play out, so help Benjamin and Hannah get in the driver's seat and decide which way they're going to steer. For Debbie and Darrell, there are some critical questions to explore to help get Benjamin and Hannah in the driver's seat, such as:

Is it technological expertise that led to the tech-driven success in the past, or something else? Discovering the answer to this question may actually reveal that it actually was NOT the IT team who made Bold Bank successful. Possibly leadership, a core group of influencers, or some other factor we're not imagining without the real data. If that's the case, they may have something new to leverage to make this adoption happen. It may reveal that it in fact was the IT team's expertise that led to tech-driven success. If that's the case, they have a decision to make—which leads to the next questions.

Do they want to keep a strong IT team as their strategic advantage? The answer to this question may help Benjamin answer for himself what he is willing to invest and to sacrifice to keep this strategic advantage.

Is it strategically in the best interest of Bold Bank to pursue the adoption with the data they now have? If yes, and Benjamin still feels there is no room for delay, he may decide to sacrifice talent for time. Start exploring with Bold Bank how they can make the new IT adoption happen without a fully staffed in-house IT team. Think of opportunities such as IT service providers as strategic partners in the effort; lateral moves, and temporary assignments for technology champions at Bold Bank. There are likely a lot of creative options here. If yes, and Benjamin accepts, it will take time, and he may be willing to sacrifice time for

talent. Decide what rebuilding and reinvigorating the IT team will look like, then get to it! If no, your partnership takes a different course. Now it's time to figure out how to walk back the announcement internally and externally. A strategy reset is also likely to be necessary in this scenario.

What is at the core of the IT team members leaving? Regardless of the answers to the above questions, this is an important question for Bold Bank to explore because it could be a pervasive issue. Doing a bit of discovery work here could reveal other

Doing a bit of discovery work here could reveal other functions at high risk for another mass exodus. It could also provide valuable lessons for Bold Bank leaders and employees about their values, practices, and culture. And if Benjamin says he does not have time to answer any of the above questions, walk away. If he isn't willing to answer these questions, he is essentially asking you to make this new IT adoption happen without data and without a healthy IT team.

functions at high risk for another mass exodus. It could also provide valuable lessons for Bold Bank leaders and employees about their values, practices, and culture. And if Benjamin says he does not have time to answer any of the above questions, walk away. If he isn't willing to answer these questions, he is essentially asking you to make this new IT adoption happen without data and without a healthy IT team.

Ellen Ekevag Responds

Even as a church consultant, I can easily relate to Debbie and Darrell's feelings of being overwhelmed. As Organization Development practitioners, we often find ourselves in uncharted territory and in complex situations. From this case study there seems to be at least two opportunities for Debbie and Darrell:

1. The immediate question of the IT effort roll out, its timing, and action plan.
2. The larger issues surrounding the IT department with its 50% rate of turnover. If Bold Bank prides itself on

being early adopters of technology, why is their IT workforce leaving at such high rates?

It is easy to surmise that there is a high level of anxiety at Bold Bank. Anxiety is often a sign of misalignment. While Bold Bank may have the vision, incentives, resources, and action plan, they are lacking the IT skills necessary to make this roll out a success. If the lack of skills leads to a failed action plan, this would result with a false start of the IT effort. Bold Bank's 100-year old reputation as leaders

in the banking industry could be at stake. If they were to lose or damage their reputation this most likely would impact their business and profits. While in today's world there is an incredible amount of pressure to move quickly, we must also consider the cost. Debbie and Darrell can help Hannah to communicate more effectively with the President through presenting the data, realistic timeliness, and possible action plans so that he and the executive team can make an informed and realistic decision about how to move forward. One of the gifts OD can bring to organizations is the long view, which is sometimes lacking today as we are pushed and pulled by the immediacy and anxiety of our present time-pressed era. While the president may be unhappy with the data and timelines for hiring and training, in the long run this information presents a more realistic view that will ensure the success of the IT effort and ultimately the bank.

Admittedly, like Debbie and Darrell, I have little to no experience with IT

departments, but a 50% turnover with more people planning on leaving later in the month raises a red flag. This challenge brings with it another opportunity for HR and OD to work together. Debbie and Darrell can plan a process such as listening sessions, interviews, or surveys to collect data to better understand why the IT department is having difficulty hanging on to talent. This intervention not only strengthens the relationships between HR and OD, but at the same time models for the larger organization interdepartmental partnerships and alignment.

It is easy to surmise that there is a high level of anxiety at Bold Bank. Anxiety is often a sign of misalignment. While Bold Bank may have the vision, incentives, resources, and action plan, they are lacking the IT skills necessary to make this roll out a success. If the lack of skills leads to a failed action plan, this would result with a false start of the IT effort. Bold Bank's 100-year old reputation as leaders in the banking industry could be at stake.

My hunch is that there is a need and even urgency for the IT department to better address talent issues if Bold Bank is to maintain its reputation and its mission as early adopters of new technology. Debbie and Darrell might consider prioritizing the IT department issues.

So much of the time we can feel overwhelmed by problems. However, if as practitioners we can reframe problems into opportunities then we can more easily manage and access our tool box to assist our organizations in decision making and change efforts. I would finally encourage Debbie and Darrell to see this situation as an opportunity worth pursuing, encouraging them to continue to reach out to colleagues for assistance and advice.

Dan Lichter Responds

Fear not! This OD project is not doomed—it is merely an OD project. This IT department is not dismal—it is merely an IT department. The situation faced by Bold

Bank is by no means unprecedented. Challenges of this sort are near and dear to me, and are in fact what led me to OD from IT; there is copious opportunity for all stakeholders to develop. OD specialists do not believe IT is a domain for their “natural contribution.” The IT community does not understand OD. The OD community does not understand IT. Let's tackle two considerations: OD's credibility, and the lack of understanding IT culture, then we can propose some intervening steps toward improving alignment between IT and its parent Bold Bank.

Build OD Credibility

As OD scholar Dr. Tom Head suggested: Address some low-hanging fruit first, then utilize the resultant energy and momentum to earn respect and loyalty from groups throughout the organization—in this case leadership, HR, and IT—to tackle the larger, more difficult dimensions of the change project. If OD can identify and assist Bold Bank leadership to execute some “easy wins” based on stakeholder feedback, OD's credibility can be quickly established and then leveraged to increase the likelihood of success with “Project Breakthrough.”

Debbie needs a tip. She can assist HR with organization design aspects, rather than simply relegating the issues to HR. In particular, consider Bold Bank's rewards systems. There may be opportunities to connect rewards to the successful completion of Project Breakthrough. This would contribute towards retention efforts and reinforce the commitment to that project.

IT Culture

Hannah, Debbie, and Darrell need to understand that IT culture typically embraces a technical focus: task and technology are usually the priorities. “Human issues” tend to be considered out of scope. From IT's perspective, executive management is economically focused, thus IT folks presume that leadership regards IT as a cost-pit, not a strategic imperative. For the IT folks, executives “just don't get it.” (Ironically, IT people might have more in common with executive leadership than either party would care to admit, as results take priority over people.) Bold Bank, however, has a singular opportunity in front of them: Benjamin does in fact see this IT project as a strategic imperative. Debbie and Darrell simply need to help convey that positive regard to the IT team and their commitment and motivation will soon follow. IT specialists can thrive in “crisis mode” in stints. The urgency of rolling out Project Breakthrough may be leverageable as a motivating factor. (Shh! Don't tell non-IT people about this.) All parties may want to read *Working in IT* by Rob England for insight into, well, working in IT.

Actions for OD

IT staff want to feel heard. Interview the remaining IT staff, including those slated to depart. Inquire about drivers to recent turnover and what might help slow it down. Keep in mind that in any organization, more harm than good will result if we ask for feedback yet take no action in response. This may be more intense with IT personnel, as that constituency believes strongly that if a viable solution has been identified, it should simply be implemented.

If, in the recent past, Bold Bank truly had expertise with cutting edge banking technology that was “second to none” then we should investigate that as a “positive core” and revitalize it per the Ai philosophical approach. Do I mean AI? No. Tread carefully. To IT, AI is “artificial intelligence.” Yet an appreciative inquiry (Ai) approach may very well be the best method

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in this scenario. More specifically, a SOAR analysis (focused on Strengths, Opportunities, Aspirations, and Results as a positivistic approach to the traditional SWOT analysis) may provide insight to stop the hemorrhage of turnover and allow Bold Bank to change the momentum for its IT organization. Consider a townhall-style meeting midway through to report out on changes implemented in response to feedback and to communicate upcoming changes. It is of critical importance for IT to understand how their work contributes to Bold Bank’s overall strategies. Allow IT to develop the plan for Project Break-through and allow them to own it, and to execute it.

IT is tricky! Executive leadership is tricky. Through OD, Debbie, Darrell, and Hannah can engage aspects of Bold Bank culture, help them align, and facilitate collective forward movement for everyone’s benefit.

Therese Yaeger, PhD, and Peter Sorensen, PhD, are Professor and Director of the PhD program in Organization Development and the MSMOB Programs at Benedictine University in Lisle and Springfield, Illinois. Yaeger can be reached at tyaeger@ben.edu.

Kiersten Rippeteau, CDDP, is an OD consultant whose career in OD unknowingly started as a wilderness guide focused on experiential learning, group dynamics, and team development. Since then, she’s been using many of those same skills to help leaders improve business operations and outcomes in the healthcare and construction industries. She can be contacted at kiersten.ripp@gmail.com.

The Rev. Ellen Ekevag is an Episcopal Priest and currently the Rector of Emmanuel Episcopal Church in La Grange, IL. As a clergy coach and consultant for the Diocese of Chicago, she works with clergy, boards, and congregations in conflict management, change processes, spiritual development, and strategic planning. The Rev. Ellen Ekevag is also a student at Benedictine University studying Organization Development. Ellen Ekevag can be reached at eekevag@gmail.com.

Dan Lichter is an experienced IT leader with a rich history in higher education where he led “green IT” projects that were recognized with coverage in national industry press. A PhD student in OD at Benedictine University, his research concerns the effects of culture on success rates of IT-related organization change. Dan holds an MS in Finance and an MBA in MIS from Saint Xavier University, and a BS degree in Computer Science from the Illinois Institute of Technology. Dan Lichter can be reached at danlichter1@gmail.com.

Yaeger and Sorensen Respond

The respondents to this case each address a different opportunity for OD at Bold Bank, whether it is the critical questions to ask, the different opportunities for OD, or helping IT better appreciate Organization Development work.

Kiersten raises pertinent questions for the OD team regarding past success and future strategies. Ellen raises the issue of various opportunities for OD, namely, the IT roll out and/or the larger issue of IT turnover. Dan’s explanation provides his personal wisdom with IT folks—that IT doesn’t often understand OD. His suggestion of building OD’s credibility seems necessary for us as well.

Most importantly, these respondents want to get to the core of **why** there is such turnover in IT—let’s save that issue for another *OD Review* case.

A very big thanks to our respondents, Kiersten, Ellen, and Dan!

Guidelines for Authors

The *Organization Development Review* brings together academic perspectives and practitioner experiences to foster dialogues that inform both theory and practice. We publish applied research, innovative approaches, evidence based practices, and new developments in the OD field.

We welcome articles by authors who are OD practitioners, clients of OD processes, Human Resource staff who have collaborated with OD practitioners or are practicing OD, and academics who teach OD theory and practice. As part of our commitment to ensure all OD Network programs and activities expand the culture of inclusion, we encourage submissions from authors who represent diversity of race, gender, sexual orientation, religious/spiritual practice, economic class, education, nationality, experience, opinion, and viewpoint.

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- » Presents applied research, innovative practice, or new developments in the OD field
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- » Presents ideas logically and with clear transitions
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Guidelines for Authors (contd.)

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