

What Is Organization Development?

Think for a moment about the organizations to which you belong. You probably have many to name, such as the company where you work, a school, perhaps a volunteer organization, or a reading group. You are undoubtedly influenced by many other organizations in your life, such as a health care organization like a doctor's office or hospital, a church group, a child's school, a bank, or the local city council or state government. Using an expansive definition of organization, you could name your own family or a group of friends as an organization that you belong to as well. With just a few moments' reflection, you are likely to be able to name dozens of organizations that you belong to or that influence you.

Now consider an organization that you currently do not belong to, but one that you were dissatisfied with at some point in the past. What was it about that organization that made the experience dissatisfying? Perhaps you left a job because you did not have the opportunity to contribute that you would have liked. Maybe it was a dissatisfying team atmosphere, or you were not appreciated or recognized for the time and energy that you dedicated to the job. It could have been a change to your responsibilities, the team, or the organization's processes. Some people report that they did not feel a larger sense of purpose at work, they did not have control or autonomy over their work, or they did not find an acceptable path to growth and career development. Perhaps you've witnessed or been part of an organization that has failed for some reason. Perhaps it went out of business or it disbanded because it could no longer reach its goals.

You've likely had some excellent experiences in organizations, too. You may have had a job that was especially fulfilling or where you learned a great deal and coworkers became good friends. Maybe your local volunteer organization helped a number of people through organized fundraisers or other social services activities.

Perhaps you joined or started a local community group to successfully campaign against the decision of your local city council or school board.

All of this is to demonstrate what you already know intuitively, that we spend a great deal of our lives working in, connected to, and affected by organizations. Some of these organizations function quite well, whereas others struggle. Some are quite rewarding environments in which to work or participate, but in others, organizational members are frustrated, neglected, and disengaged.

The purpose of this book is to introduce you to the field of organization development, an area of academic study and professional practice focused on making organizations better—that is, more effective and productive and at the same time more rewarding, satisfying, and engaging places in which to work and participate. By learning about the field of organization development and the process by which it is conducted, you will be a more effective change agent inside the organizations to which you belong.

Organization Development Defined

Organization development (OD) is an interdisciplinary field with contributions from business, industrial/organizational psychology, human resources management, communication, sociology, and many other disciplines. Not surprisingly, for a field with such diverse intellectual roots, there are many definitions of organization development. Definitions can be illuminating as they point us in a direction and provide a shared context for mutual discussion, but they can also be constraining as certain concepts are inevitably left out with boundaries drawn to exclude some activities. What counts as OD thus depends on the practitioner and the definition, and these definitions have changed over time. In a study of 27 definitions of organization development published since 1969, Egan (2002) found that there were as many as 60 different variables listed in those definitions. Nonetheless, there are some points on which definitions converge.

One of the most frequently cited definitions of OD comes from Richard Beckhard (1969), an early leader in the field of OD:

Organization development is an effort (1) *planned*, (2) *organizationwide*, 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. (p. 9)

Beckhard's definition has many points that have survived the test of time, including his emphasis on organizational effectiveness, the use of behavioral science knowledge, and the inclusion of planned interventions in the organization's functions. Some critique this definition, however, for its emphasis on planned change (many organizational changes, and thus OD efforts, are in response to environmental threats that are not so neatly planned) and its emphasis on the need to drive organizational change through top management. Many contemporary OD

activities do not necessarily happen at the top management level, as increasingly organizations are developing less hierarchical structures.

A more recent definition comes from Burke and Bradford (2005):

Based on (1) a set of values, largely humanistic; (2) application of the behavioral sciences; and (3) open systems theory, organization development is a systemwide process of planned change aimed toward improving overall organization effectiveness by way of enhanced congruence of such key organizational dimensions as external environment, mission, strategy, leadership, culture, structure, information and reward systems, and work policies and procedures. (p. 12)

Finally, I offer a third:

Organization development is the process of increasing organizational effectiveness and facilitating personal and organizational change through the use of interventions driven by social and behavioral science knowledge.

These definitions include a number of consistent themes about what constitutes organization development. They propose that an outcome of OD activities is organizational effectiveness. They also each stress the applicability of knowledge gained through the social and behavioral sciences (such as sociology, business and management, psychology, and more) to organizational settings.

Change Is a Constant Pressure

Perhaps the point on which most definitions agree is that the backdrop and purpose of organization development is change. As you have no doubt personally experienced, large-scale organizational change is rarely simple and met without skepticism. As Peter Senge writes, “Most of us know firsthand that change programs fail. We’ve seen enough ‘flavor of the month’ programs ‘rolled out’ from top management to last a lifetime” (Senge et al., 1999, p. 6). Because of its impact on the organizational culture and potential importance to the organization’s success, organizational change has been a frequent topic of interest to both academic and popular management thinkers. With change as the overriding context for OD work, OD practitioners develop interventions so that change can be developed and integrated into the organization’s functioning.

To become effective, productive, and satisfying to members, organizations need to change. It will come as no surprise to any observer of today’s organizations that change is a significant part of organizational life. Change is required at the organizational level as customers demand more, technologies are developed with a rapidly changing life cycle (especially high-tech products; Wilhelm, Damodaran, & Li, 2003), and investors demand results. This requires that organizations develop new strategies, economic structures, technologies, organizational structures, and processes. As a result, change is also required of individuals. Employees learn new skills

as jobs change or are eliminated. Organizational members are expected to quickly and flexibly adapt to the newest direction. Best-selling business books such as *Who Moved My Cheese?* teach lessons in ensuring that one's skills are current and that being comfortable and reluctant to adapt is a fatal flaw. For organizational members, change can be enlightening and exciting, and it can be hurtful, stressful, and frustrating.

Whether or not we agree with the values behind “change as a constant,” it is likely to continue for the foreseeable future. Whereas some decry an overabundance of change in organizations (Zorn, Christensen, & Cheney, 1999), others note that it is the defining characteristic of the current era in organizations and that becoming competent at organizational change is a necessary and distinguishing characteristic of successful organizations (Lawler & Worley, 2006). There are, however, more- and less-effective ways to manage change. Creating and managing change in order to create higher performing organizations in which individuals can grow and develop is a central theme of the field of OD. When we speak of organization development, we are referring to the management of certain kinds of these changes, especially how people implement and are affected by them.

What Organization Development Looks Like

It may be easiest to understand what organization development is by understanding what forms it takes and how it is practiced. The following are five examples of published case studies of OD in action.

Example 1: Increasing Employee Participation in a Public Sector Organization (O'Brien, 2002)

Public sector organizations, it has been noted (Coram & Burns, 2001), often face additional special challenges in the management of change. Bureaucratic structures, interfaces with regional governments and legislatures, political pressures, and legislative policies all complicate the implementation of new processes and changes to organizational practices. In the Republic of Ireland, a special initiative launched in the mid-1990s aimed to reduce bureaucracy in the public sector to gain efficiency, improve customer service, and improve interdepartmental coordination. Many programs of this type have been launched in other organizations as top-down mandates from senior management, causing frustration and decreased commitment among staff members who resisted the mandated changes.

One department wanted to do things differently. The offices were in the division of Social Welfare Services (SWS), a community welfare organization of 4,000 employees. Two Dublin offices (50 employees each) became the focus of this case. These offices chose to involve employees in the development of an initiative that would improve working conditions in the department as well as increase the employees' capacity for managing changes. A project steering team was formed, and they began by administering an employee survey to inquire about working relationships, career development, training, technology, and management. Follow-up

data gathering occurred in focus groups and individual interviews. The tremendous response rate of more than 90% gave the steering team a positive feeling about the engagement of the population, but the results of the survey indicated that a great deal of improvement was necessary. Many employees felt underappreciated, distrusted, and not included in key decisions or changes. Relationships with management were also a concern as employees indicated few opportunities for communication with management and that jobs had become routine and dull.

The steering team invited volunteers (employees and their management) to work on several of the central problems. One team worked on the problem of communication and proposed many changes that were later implemented, including a redesign of the office layout to improve circulation and contact among employees. As the teams continued discussions, they began to question standard practices and inefficiencies and to suggest improvements, eventually devising a list of almost 30 actions that they could take. Managers listened to employee suggestions, impressed by their insights. As one manager put it, “I have learned that a little encouragement goes a long way and people are capable of much more than given credit for in their normal everyday routine” (O’Brien, 2002, p. 450).

The joint management-employee working teams had begun to increase collaboration and interaction among the two groups, with each reaching new insights about the other. As a result of the increased participation, “There appeared to be an enhanced acceptance of the change process, coupled with demands for better communications, increased involvement in decision making, changed relationships with supervisors and improved access to training and development opportunities” (p. 451).

Example 2: Senior Management Coaching at Vodaphone (Eaton & Brown, 2002)

Vodaphone is a multibillion-dollar global communications technology company headquartered in the United Kingdom and was an early leader in the mobile telephone market. Faced with increasing competition, the company realized that in order to remain innovative and a leader in a challenging market, the culture of the organization would need to adapt accordingly. Specifically, senior management realized that its current “command and control” culture of blame and political games would hinder collaboration and mutual accountability needed to succeed in a competitive environment. Instead, the company wanted to encourage a culture of empowered teams who made their own decisions and shared learning and development, speed, and accountability.

Several culture initiatives were implemented, including the development of shared values, the introduction of IT systems that shared and exchanged information across major divisions that had hindered cross-functional learning, and the establishment of teams and a team-building program.

To support the initiatives and encourage a new, collaborative management style, Vodaphone implemented a leadership coaching program. Through the program, top managers attended a program to learn skills in conducting performance reviews, helping employees set goals, and coaching teams. Following the program, managers had one-on-one coaching sessions with a professional coach who worked

with participants to help them set coaching goals and reflect on how successfully they were able to implement the skills learned in the program.

As a result of the program, managers began to delegate more as teams started to solve problems themselves. Teams began to feel more confident in their decisions as managers trusted them. The authors attribute several subsequent company successes to the program, noting that it was critical that the coaching program was integrated with the other culture change initiatives that it supported. “Cultural change takes time,” Eaton and Brown (2002, p. 287) note, and “traditional attitudes to management do not die away overnight.” However, they point out that a gradual evolution took place and the new cultural values are now the standard.

Example 3: Team Development in a Cancer Center (Black & Westwood, 2004)

Health care workers who have the challenge of caring for critically ill patients experience stress, emotional exhaustion, and burnout at very high rates compared with workers in other fields. Without social support from friends or other coworkers, many workers seek to leave the field or to reduce hours to cope with the emotional exhaustion of a demanding occupation. Consequently, many researchers have found that health care workers in particular need clear roles, professional autonomy, and social support to reduce burnout and turnover.

In one Canadian cancer center, a senior administrator sought to address some of these needs by creating a leadership team that could manage its own work in a multidisciplinary team environment. Team members would have professional autonomy and would provide social support to one another. Leaders volunteered or were chosen from each of the center’s main disciplines, such as oncology, surgery, nursing, and more. Organization development consultants were invited to lead workshops in which the team could develop cohesive trusting relationships and agree on working conditions that would reduce the potential for conflict among disciplines.

In a series of three 2-day workshops over 3 months, the team participated in a number of important activities. They did role-play and dramatic exercises in which they took on one another’s roles in order to be able to see how others see them. They completed surveys of their personal working styles to understand their own communication and behavior patterns. The team learned problem-solving techniques, they clarified roles, and they established group goals.

Three months after the final workshop was conducted, the facilitators conducted interviews to assess the progress of the group. All of the participants reported a better sense of belonging, a feeling of trust and safety with the team, and a better understanding of themselves and others with whom they worked. One participant said about a coworker, “I felt that [the workshops] connected me far differently to [coworker] than I would have ever had an opportunity to do otherwise, you know in a normal work setting” (Black & Westwood, 2004, p. 584). The consultants noted that participants wanted to continue group development on an ongoing basis.

Example 4: A Future Search Conference in a Northern California Community (Blue Sky Productions, 1996)

Santa Cruz County is located in Northern California, about an hour south of San Francisco. In the 1960s, the county had approximately 25,000 residents in an agricultural region and in a small retirement community. In the late 1960s, the University of California, Santa Cruz opened its doors, and in the following years the county began to experience a demographic shift as people began to move to the area and real estate prices skyrocketed. By 1990, the population had reached 250,000 residents, and increasingly expensive real estate prices meant that many residents could no longer afford to live there. Affordable housing was especially a problem for the agricultural community. A local leadership group had convened several conferences but could never agree on an approach to the housing problem.

In the mid-1990s, a consortium of leaders representing different community groups decided to explore the problem further by holding a future search conference. They invited 72 diverse citizens to a 3-day conference not only to explore the problem of affordable housing but also to address other issues that they had in common. The citizen groups represented a cross-section of the community, from young to old, executives to farmworkers, and social services agencies. Attendees were chosen to try to mirror the community as a “vertical slice” of the population. They called the conference “Coming Together as a Community Around Housing: A Search for Our Future in Santa Cruz County.”

At the conference, attendees explored their shared past as individuals and residents of the county. They discussed the history of the county and their own place in it. Next, they described the current state of the county and the issues that were currently being addressed by the stakeholder groups in attendance. The process was a collaborative one, as one attendee said, “What one person would raise as an issue, another person would add to, and another person would add to.” There were also some surprises as new information was shared. One county social services employee realized that “there were a couple of things that I contributed that I thought everyone in the county knew about, and [I] listen[ed] to people respond to my input, [and say] ‘oh, really?’” Finally, the attendees explored what they wanted to work on in their stakeholder groups. They described a future county environment 10 years out and presented scenarios that took a creative form as imaginary TV shows and board of supervisors meetings. Group members committed to action plans, including short- and long-term goals.

Eighteen months later, attendees had reached a number of important goals that had been discussed at the conference. Not only had they been able to increase funding for a farmworkers housing loan program and created a rental assistance fund, but they were on their way to building a \$5.5 million low-income housing project. In addition, participants addressed a number of nonhousing issues as well. They embarked on diversity training in their stakeholder groups, created a citizen action corps, invited other community members to participate on additional task force groups, and created a plan to revitalize a local downtown area. “Did the future search conference work?” one participant wondered. “No question about it. It provided a living model of democracy.”

Example 5: A Long-Term Strategic Change Engagement (Sackmann, Eggenhofer-Rehart, & Friesl, 2009)

ABA, a German trading company with 15,000 employees, embarked on a major strategic change initiative driven by stiff competition. A global expansion prompted the company to reorganize into a three-division structure. A decentralized shared services model, comprised of 14 new groups, was created for administrative departments that would now support internal divisions. To support the culture of the new organization, executives developed a mission and vision statement that explained the company's new values and asked managers to cascade these messages to their staffs. This effort was kicked off and managed from the top of the organization.

The director of the newly formed shared services centers contacted external consultants, suspecting that a simple communication cascade to employees would not result in the behavioral changes needed in the new structure. The new administrative groups would have significant changes to work processes, and the lead managers of each of the 14 new groups would need assistance to put the new values and beliefs into practice. The consultants proposed an employee survey to gauge the beliefs and feelings of the staff and to provide an upward communication mechanism. Survey results were available to managers of each center, and the external consultants coached the managers through an interpretation of the results to guide self-exploration and personal development. Internal consultants worked with the managers of each of the new centers to facilitate a readout of the survey results with employees and take actions customized to the needs of each group. Consultants conducted workshops for managers to help them further develop personal leadership and communication skills, topics that the survey suggested were common areas of improvement across the management team. Over a period of 4 years, the cycle was repeated, using variations of the employee survey questions, a feedback step, and management development workshops covering new subjects each time.

Interviews and surveys conducted late in the process showed that employees had a positive feeling about change in general. Leaders reported noticing a more trusting relationship between employees and their managers characterized by more open communication. Center managers took the initiative to make regular and ongoing improvements to their units. The authors noted the need for a major change like this one to include multiple intervention targets. This organization experienced "changes in strategy, structure, management instruments, leadership, employee orientation, and the organization's culture context" (p. 537), which required a broad set of surveys, coaching, and workshops to support. "These change supporting activities helped implement the change with lasting effect" (p. 537), they conclude.

As you can see from this and the previous examples, OD is concerned with a diverse variety of issues to address problems involving organizations, teams, and individuals. OD is also conducted in a diverse variety of organizations, including federal, state, and local governments (which are among the largest employers in the United States, according to the U.S. Bureau of Labor Statistics), public sector

organizations around the world, health care organizations, educational settings, and nonprofit and private enterprises. Interventions can involve a single individual, a small team (such as the cancer center team described above), multiple teams, or a whole organization. It can also consist of multiple targets of change, such as in the Vodaphone initiative that involved not only large-scale culture change but also the implementation of teams and individual coaching. OD can also deal with multiorganization efforts, such as that described in Santa Cruz County, or it can involve multiple national governments. The target of change can be something as seemingly simple as increasing employee involvement or developing coworker relationships, or it can be as potentially large as creating the vision or strategy of an entire organization or documenting the 10-year future of a large county.

What Organization Development Is Not

Despite this seemingly expansive definition of what organization development is and what issues and problems it addresses, it is also limited. OD is not any of the following.

Management Consulting

OD can be distinguished from management consulting in specific functional areas such as finance, marketing, corporate strategy, or supply chain management. It is also distinguished from information technology applications. Yet, OD is applicable to any of these areas. When organizations attempt conscious changes, whether it involves implementing a new IT system; changes in strategy, goals, or direction; or adapting to a new team leader, OD offers relevant processes and techniques to make the change function effectively. An OD practitioner would not likely use expertise in one of these content areas (for example, best practices in financial structures of supplier relationships or contemporary marketing analysis) to make recommendations about how an organization does this activity. Most management consulting also is not based on OD's set of foundational values (a topic that we will take up in detail in Chapter 3). In Chapter 5 we will discuss OD consulting in particular and differentiate it from management consulting activities with which you may be familiar.

Training and Development

While individual and organization learning is a part of OD and a key value we will discuss in a later chapter, OD work is not confined to training activities. OD is not generally the context in situations in which learning is the sole objective, such as learning a new skill, system, or procedure. OD deals with organizational change efforts that may or may not involve members of the organization needing to learn specific new skills or systems. Many training and development professionals are gravitating toward OD to enhance their skills in identifying the structural elements of organizations that need to be changed or enhanced for training and new skills to be effective. Other aspects of the training and development profession, however,

such as needs assessment, course development, the use of technology, or on-the-job training, are not central to the job of the OD practitioner.

In addition, most training programs are developed for a large audience, often independent of how the program would be applied in any given organization. While some OD interventions do incorporate training programs and skill building, OD is more centrally concerned with the context that would make a training program successful, such as management support, job role clarification, process design, and more. As Burke (2008) writes, “Individual development cannot be separated from OD, but to be OD, individual development must be in the service of or leverage for system-wide change, an integral aspect of OD’s definition” (p. 23).

Short Term

OD is intended to address long-term change. Even in cases in which the intervention is carried out over a short period (such as the several-day workshops conducted at the cancer center described earlier), the change is intended to be a long-term or permanent one. OD efforts are intended to develop systemic changes that are long lasting. In the contemporary environment in which changes are constantly being made, this can be particularly challenging.

The Application of a Toolkit

Many OD practitioners speak of the OD “toolkit.” It is true that OD does occasionally involve the application of an instrumented training or standard models, but it is also more than that. To confuse OD with a toolkit is to deny that it also has values that complement its science. It is more than a rigid procedure for moving an organization, team, or individual from point A to point B. It involves being attuned to the social and personal dynamics of the client organization that usually require flexibility in problem solving, not a standardized set of procedures or tools. In Chapter 3, we will discuss the values that underlie OD to better understand the fundamental concepts that explain how and why OD practitioners make the choices they do.

Who This Book Is For

This book is for students, practitioners, and managers who seek to learn more about the process of organizational change following organization development values and practices. We will use the term *organization development*, as most academic audiences prefer, over the term *organizational development*, which seems to dominate spoken and written practitioner communication. We will also refer to the *organization development practitioner*, *consultant*, and *change agent* in this book as a single general audience, because these terms emphasize that OD is practiced by a large community that can include more than just internal and external OD consultants.

OD includes (and the book is written for) anyone who must lead organizational change as a part of his or her role. With the magnitude and frequency of organizational change occurring today, this encompasses a wide variety of roles and is an

increasingly diverse and growing community. The OD practitioner can include the internal or external organization development consultant, but also managers and executives, human resources and training professionals, quality managers, project managers and information technology specialists, educators, health care administrators, directors of nonprofit organizations, and many more. We will also more frequently discuss *organizational members* than employees, which is a more inclusive term that includes volunteers in nonprofit groups and others who are connected to organizations but who may not have an employment relationship with them. The term also is intended to include not just leaders, executives, and managers but also employees at all levels.

Overview of the Book

This book provides an overview of the content of organization development, including theories and models used by change agents and OD practitioners. It also explores the process by which OD is practiced. The objective of the book is to acquaint you with the field of OD and the process of organization development consulting. The goal is to develop your analytic, consulting, and practitioner skills so that you can apply the concepts of OD to real situations. We will simulate these consulting situations through six detailed case studies, which follow many of the skill development chapters, in which you will be able to immediately practice what you have learned in the chapter.

Chapters 2 through 5 will explore the foundations of the field, including its history, values, and an overview of the key concepts and research in organizational change. In these chapters you will learn how OD began as a field, how it has evolved over the past decades, and how most practitioners think of the field today. In Chapter 3, we will discuss the underlying values and ethical beliefs that influence choices that practitioners must make in working with clients. Chapter 4 provides a foundation in research into organizational change from a systems perspective, a common way of thinking about organizations. We will also discuss a social construction perspective on organizational change. In this chapter you will be exposed to models of organizational systems and organizational change that have influenced the development of many OD interventions. In Chapter 5, we will define the role of the OD consultant, differentiating the OD consultant from other kinds of consultants, and describing the specific advantages and disadvantages to the OD consultant when the consultant is internal or external to the organization.

Beginning with Chapter 6, the book follows an action research and consulting model (entry, contracting, data gathering, data analysis/diagnosis, feedback, interventions, and evaluation). We will discuss the major actions that practitioners take in each of these stages and describe the potential pitfalls to the internal and external consultant. Chapter 6 describes the early stages of the consulting engagement, including entry and contracting. You will learn how a consultant contracts with a client and explores what problems the client is experiencing, how those problems are being managed, and how problems can be (re)defined for a client. In Chapter 7

we will cover how practitioners gather data, as well as assess the advantages and disadvantages of various methods for gathering data about the organization. Chapter 8 describes what OD practitioners do with the data they have gathered by exploring the dynamics of the feedback and joint diagnosis processes. This stage of the consulting process is especially important as it constitutes the point at which the client and consultant define what interventions will best address the problems that have been described.

Chapter 9 begins by describing the most visible aspect of an OD engagement—the intervention. We will discuss the components of interventions and describe the decisions that practitioners must make in grappling with how to structure them for maximum effectiveness. Chapters 10 through 12 address the traditional OD practices with which most practitioners ought to be familiar, including interventions such as organization design, strategic planning, quality interventions, team building, survey feedback, individual instruments, and coaching and mentoring. These chapters also incorporate newer practices being used with increasing frequency, such as appreciative inquiry, future search, and Six Sigma. These interventions are organized according to the target of the intervention, whether it be the whole organization, multiple groups, single groups, or individuals. In Chapter 13 we will conclude our discussion of the OD process by exploring how organization development practitioners separate themselves from client engagements and evaluate the results of their efforts. In Chapter 14 we will discuss the applicability and relevance of OD to contemporary organizations, given trends in demographics, working conditions, and organizational environments.

Many chapters begin with an opening vignette and thought questions to set the stage for the topics covered in those chapters. Some of these vignettes present published case studies of successful and unsuccessful OD efforts. As you read the vignettes and the chapter, consider what factors made the case more or less successful and what lessons the practitioner may have learned from the experience. You may wish to find the published case and read it for additional details not presented in the vignette. Reading published cases can help you develop a deeper appreciation for the complexities of OD work and learn from the successes and struggles that others have experienced.

Following trends in the corporate world, ethical issues in OD are gaining the attention of academics, clients, and practitioners. While we will discuss values and ethics in Chapter 3, rather than leave ethical dilemmas to that chapter alone, we will also discuss ethical issues in organization development at relevant points throughout the book, when appropriate for the stage in the OD process being described.

Analyzing Case Studies

The case studies included in this book are intended to help you learn the role and thought process of an OD consultant or change agent through realistic examples. By reading and analyzing case studies, you will actively participate in applying the theory and concepts of OD to complex, real-life situations that consultants find

themselves in every day. These cases are all based in practitioners' real experiences—names and some details have been changed to protect the client's and practitioner's anonymity. By stepping into a practitioner's shoes, you will be challenged to make the tradeoffs and choices that managers and consultants are asked to make. The cases will help you develop the problem-solving and critical-thinking skills that are central to the value that a practitioner brings to a client. Ideally you can discuss these cases with others who have analyzed them as well, and together you can identify the central issues in the cases and debate the most appropriate response. In this way you will be assimilating knowledge that you have about organizations, change, human dynamics, and the concepts and theories of OD. You will learn the logic behind the choices that managers and practitioners make and you will gain practice in making your thought processes explicit. The cases in the book will build on one another in complexity, so you will need to integrate what you have learned from previous chapters as you analyze each case.

The case studies in this book are written as mini-plays or scenes to provide a richly detailed scenario in which you can imagine yourself playing a part, in contrast to many commonly published case studies in which a few short paragraphs provide all of the detail available for analysis. Since a good deal of OD and change management involves noticing and responding to the human and relational dynamics of a situation in addition to the task and content issues, the scenes in this book provide both in order to give you practice in becoming an observer of people during the process of organizational change. The cases in this book also are situated in a number of diverse types of organizations in which OD is practiced, including educational environments, health care and nonprofit organizations, and for-profit businesses. Each of these types of organizations brings with it unique challenges and opportunities for the OD practitioner.

Each case provides a slice of organizational life, constructed as a brief scene in which you can imagine yourself playing a part, but which will require your conscious thinking and reflection. Cases present situations with many options. As Ellet (2007) writes, "A case is a text that refuses to explain itself" (p. 19). It requires you to take an active role to interpret it and discover its meaning. Fortunately, unlike the passage of time in real life, in written cases life is momentarily paused to give you the chance to consider a response. While you do not have the opportunity to gather additional data or ask questions of participants, you do have the ability to flip back a few pages, read the situation again, and contemplate. You can carefully consider alternate courses of action, weigh the pros and cons of each, and clarify why you would choose one option over another.

As a result of having to make these choices, you will hone your ability to communicate your rationale for your decisions. Classmates will make different choices, each with their own well-reasoned rationales. Through discussion you will sharpen your ability to solve problems, understanding the principles behind the decisions that you and your classmates have made. You will learn about how your own experiences shape your assumptions and approaches to problems. You will be challenged to develop your skills to provide evidence for your reasoning, defend your analyses, and explain your thinking in clear and concise ways for fellow practitioners

and clients alike. You may find that these discussions prompt you to change your mind about the approach you would take, becoming convinced by a classmate's well-reasoned proposal, or you may find that your reasoning persuades others that your approach has the greater advantages.

Regardless, you will learn that there is no single right answer at the back of the book or to be shared by your instructor after you have struggled. For some of the cases in this book, your instructor may share with you what happened after the case concluded. This information may provide support for the approach you would have taken, or it may make you think that your approach was incorrect. Instead of seeking the right or wrong answer, however, asking yourself whether your proposal was well-reasoned given the circumstances is more important than knowing the exact outcome of the case. While you have the opportunity to do so, use the occasion of the case study and the discussion to play with various alternatives. Here, the process may be more important than the outcome.

The following tips will help you get started with case study analysis.

1. Read the entire case first, and resist the temptation to come to any conclusions the first time you read it. Allow yourself to first gather all of the relevant data about the situation before you propose any solutions or make any judgments about what is happening or what the client needs to do.

2. Use the tools and methods outlined in each chapter to help you think through the issues presented by the case. You will find worksheets, models, and outlines that can assist you in identifying and categorizing problems, selecting and prioritizing interventions, and organizing ideas to respond to the client. Use charts and diagrams to map out organizational structures and underline key phrases and issues. Write questions that come to mind in the margins. Read the case multiple times to ensure that you have not missed a key detail that would indicate to a client that you had not been paying close attention.

3. Realize that like real life, case studies contain many extra details and describe multiple issues. Organizational life is messy and complex, and not all of these details are helpful or necessary to the consultant or change agent. A consultant helping a team redefine roles and responsibilities may be doing so in an environment in which the company has acquired a competitor or quarterly results were disappointing. Part of the practitioner's role is to sort the useful primary information from the unnecessary secondary information (or information that is unnecessary for the immediate problem). This is part of the value of these case exercises and a logic and intuition that you will develop as your skills and experience grow. Ask yourself what the client is trying to achieve, what he or she has asked of you, and what the core issues and central facts are.

4. Similarly, in any response to a client or reaction to a case, resist the temptation to comment on everything. An OD practitioner can help to prioritize the most pressing issues and help the client sort through the complexities of organizational life. It could be that part of the reason the client has asked for help is that the number of possibilities for action are too overwhelming to decide what to do next.

5. When you are prepared to write a response or an analysis, ask yourself whether you have addressed the central questions asked by the case and whether you have clearly stated the issues to the client. Once your response is written, could you send that, in its present form, to the client described in the case? In that regard, is the analysis professionally written and well organized to communicate unambiguously to the client? Will the client understand how and why you reached these conclusions?

6. As you write your analysis, ask yourself how you know any particular fact or interpretation to be true and whether you have sufficiently justified your interpretation with actual data. Instead of boldly stating that “managers are not trained for their roles,” you could write, “Only 2 of 10 managers had attended a management training course in the past 5 years, leading me to conclude that management training has not been given a high priority.” The latter uses data and makes the interpretation explicit; the former is likely to invite criticism or defensiveness from a client. This does not mean that directness is not appropriate, only that it must follow from the evidence. We will describe the considerations of the feedback process in depth in this book.

7. When you have finished your own thinking and writing about the case, and after you have had the opportunity to discuss the case and options for action with classmates, take the time to write down your reflections from the experience (Ellet, 2007). What did you learn? What principles might apply for the next time you are confronted with these choices?

Summary

Today’s organizations are experiencing an incredible amount of change. Organization development is a field of academic study and professional practice that uses social and behavioral science knowledge to develop interventions that help organizations and individuals change successfully. It is a field practiced in almost all kinds of organizations that you can imagine, from education to health care, from government to small and large businesses. Changes that OD practitioners address are diverse as well, addressing organizational structures and strategies, team effectiveness, and much more. OD is not management consulting or training and development, and it is neither short term nor the mere application of a standard procedure or toolkit. OD practitioners can include many kinds of people for whom organizational change is a priority, such as managers and executives, project managers, and organizational members in a variety of roles.

For Further Reading

- Beckhard, R. (1969). *Organization development: Strategies and models*. Reading, MA: Addison-Wesley.
- Burke, W. W. (2008). A contemporary view of organization development. In T. G. Cummings (Ed.), *Handbook of organization development* (pp. 13–38). Thousand Oaks, CA: Sage.

- Egan, T. M. (2002). Organization development: An examination of definitions and dependent variables. *Organization Development Journal*, 20(2), 59–71.
- Marshak, R. J. (2006). Organization development as a profession and a field. In B. B. Jones & R. Brazzel (Eds.), *The NTL handbook of organization development and change: Principles, practices, and perspectives* (pp. 13–27). San Francisco: Pfeiffer.