

Organization Development Review

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From the Editor

As we are living in trying and challenging times, we wish everyone safety, health and well-being. At the *OD Review*, we have also experienced many difficulties over the past six months. With our beloved John Vogelsang's medical issues, the processes and

submissions during the Fall of 2019 were interfered with, causing some delays and recent scrambling.

Since taking over an interim role in October and the permanent role in January, as Editor, we have completed the 4th issue for 2019; collected, reviewed and revised the set of articles for this Special Issue on Use of Self; and have the second issue for 2020 now in process. Thank you to all who have pitched in to help.

Going forward, we will take further steps to renew our charter, identity, positioning within the OD/Change journal universe, submission guidelines, curation strategies, editorial structure, and operating processes, so that we can streamline how

we work and elevate the journal in our field and beyond.

Thank you for your understanding and patience and feel free to communicate with me at: ODN Editor editor@odnetwork.org.

Following this letter please take note of our honoring Peter Vaill following his recent passing. A critical thinker who shared with, taught many in and left a significant legacy for the whole field.

Then please see the letter from Mee Yan Cheung-Judge and me, Special Issue Guest Editors, for more on this Special Issue and its contents.

David W. Jamieson, PhD
Editor-in-Chief

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



Organization Development Review

JOURNAL OF THE ORGANIZATION DEVELOPMENT NETWORK

Invitation to Submit Articles

Please consider what you may be able to offer to our field(s) from your experiences. As a scholar-practitioner journal we welcome what you do in applying theory-in-practice, developing new insights from practice, models and frameworks you create or modify in your work and thought pieces that can help us all in tackling the new normal of continuous change, large scale transformations that are needed, global issues and implications of our inter-dependent industries and societies, and development of our practitioners and leaders for execution in an increasingly VUCA world.

Additionally, please share and distribute around our field(s) for others who can write for the *OD Review*.

We have a history of priding ourselves on having a developmental orientation in our open peer review process. In our open peer review process, the authors information is known from the beginning throughout the process. The reviewers work directly with the author(s) to revise and improve their submission.

In our double-blind review process the identification information stays hidden only with the Editor during the review and revision process. This information can be found on the OD Network website (odnetwork.org) under "OD Review Submission."

We also have a shorter article section called *Practicing OD*. The guidelines for this can also be found on the ODN website.

We encourage you to write for others to learn from experience across our profession. Thank you.

David W. Jamieson
Editor-in-Chief



In Honor of Peter Vaill (1936-2020)

With the recent passing of one of our greatest contributors, Peter Vaill, who was a scholar, teacher, author and wonderful human being, many of us want to honor him here. A few years ago, Jackie Milbrandt and I spent a lot of time with Peter, and learning about Peter, in order to write his chapter in the *Palgrave Handbook of Change Thinkers* (Szabla, D., Pasmore, W., Barnes, M. and Gipson, A., 2017). The chapter can be accessed on ResearchGate (<https://www.researchgate.net/>). He and his friend, Dave Fearon, had recently been capturing much of his recent thinking in podcasts on practice (<https://podcasts.apple.com/us/podcast/episode-17-lessons-learned/id1499423359?i=1000467837333>).

Peter stands out as a role-model of living the values, mastering the concepts and skills and sharing widely his insights and brilliance, through teaching and writing. He was one of the original scholar-practitioners, who mixed theory-in-practice with clients, students and in publications. His core streams of thought, that he advanced so well, involved the relationships among organizational practice, theory and learning. Thank you, Peter, for your inspiration, legacy and humanness.

David W. Jamieson

With much gratitude, we also want to thank Matt Minahan for creating the following, touching, remembrance.

Remembering Peter Vaill

By Matt Minahan

It was with deep sadness that I learned recently of the passing of another giant in our field, Dr. Peter Vaill.

Peter was a teacher, author, scholar, and wiseman leading the field with concepts, ideas, and metaphors that changed thousands of our lives in the field, and by extension through us and our work, those of millions of people.

Peter was best known as an author and for his metaphor of navigating organizational change as riding in white water, which he published as a recording called: *Permanent White Water: The Realities, Myths, Paradoxes, and Dilemmas of Managing Organizations* (1992). His books included *Learning as a Way of Being* (1996), *Spirited Leading and Learning: Process Wisdom for a New Age* (1998), and *Managing as a Performing Art* (1989) and were required

reading in management classes around the world.

Peter was also one of the famous “Four Horsepeople” who resurrected NTL from near bankruptcy in 1975. The membership at the time was mostly scholars and professors, and overwhelmingly white men. Peter, along with Edie Seashore, Elsie Cross, and Barbara Bunker disbanded the membership and invited back about 75 members in equal numbers of men and women, people of color and white, redirected NTL more squarely toward its social justice mission by creating an intentional laboratory of equality and power sharing across race and gender.

Peter was a strong and vital man. However, the last 19 years have been a challenge for his health. In August 2001, Peter contracted spinal meningitis in surgery

to correct an unsuccessful laminectomy which was to repair a blown disk as a consequence of a too-early/too-long club training run for what would have been his 11th marathon. The result was a spinal cord injury, paraplegia, and wheelchair dependence. Since then, he has lived independently, and with wonderful help from the staff at Walker Place. Neuropathic pain, as a result of the damaged lumbar nerves, is a dominant aspect of his life now, and symptom control a major occupation. (From Peter's CaringBridge site.)

Peter taught in the doctoral programs at UCLA, GW, St. Thomas, and Antioch University: https://web.archive.org/web/20060902174605/http://www.phd.antioch.edu/Pages/APhDWeb_Learning/APhDWeb_CoreFaculty/pvaill

My first personal encounter with Peter was while he was director of the PhD program here in DC at George Washington University. I had applied for the PhD program there but was rejected. Peter sat me down in his office, and in the most direct and gentle way told me that I was too much of a practitioner and not enough of a scholar for their program. Angry and thankful, both, in the moment, I realize now that Peter was exactly right. At GWU Peter worked closely with Jerry Harvey (The Abilene Paradox and Other Fables) and became a close collaborator with one of his doctoral students, Eric Dent. Eric went on to create an endowed chair to honor Peter's work as a teacher and scholar: https://web.archive.org/web/20050313042903/http://www.uncp.edu/news/2005/peter_vaill.htm.

Peter had a great gift of music, able to play almost any song ever recorded without sheet music. He provided hours of sing along fun and entertainment at OD events during the 80s and 90s. We were both attendees at the OD Network's Future Search in 1993. That conference brought together about 50 people to chart a new future for the Network, including its move from Portland where Sharon Thorne, one of the best OD consultants around, had been part time director, to New Jersey run by a full-time association professional. Peter played for hours on end each of the three nights. He wasn't a big and

boisterous personality like some there, just a quiet, steady, thoughtful participant. When Peter spoke, everyone listened.

Peter attended several OD Network conferences. Here is an excerpt from my Daily Report from the Montreal Conference in 2002:"

Peter Vaill arrived this evening, rolling up in his wheelchair, and was greeted by Kathie Dannemiller, who rolled up in her wheelchair. It was a great sight to see these scions of our field, both looking well and fit, sitting knee to knee in their respective wheelchairs! This is Peter's first conference since his serious viral illness last fall, and it was GREAT to see him . . . When Peter and I first embraced this evening, his first question to me was, "What time do the Men in OD meet tomorrow? Our Men session in New Orleans was the best session I've ever been to! We stayed for hours after it was finished; we just couldn't leave!" https://cdn.ymaws.com/www.odnetwork.org/resource/resmgr/Matts_Dailies/2002.pdf

He also wrote several journal articles, many for the *OD Practitioner*. You can gather a lot from the titles of his works in the *ODP*, which can be searched and retrieved at www.odnetwork.org.

- » The Games Innovators Play
- » "Observing Events": Towards a Behavioral Description of High-Performing Systems
- » An Allegory on the Relationship of H.R.P. to Systems Objectives
- » Voices: Managerial Mayhem
- » Closure and Disclosure: A Meditation
- » The Inner Tailor
- » A Personal Statement
- » The Moratorium
- » Essay: Reflections on Time and Leadership
- » The Author Writes . . .

The testimonials to Peter Vaill and his impact on us continue to pour in:

Sharon Thorne said, "Peter was a giant among us. I loved him & hated knowing about his health struggles these last

19 years. So hard for me to come to ease with suffering. I hope he rests easily now and his family too."

Frances Baldwin said: "Peter Vaill was a special kind of thinker, teacher and writer. I have missed his presence over those 19 years; he will be missed and remembered for his brilliance and that wide smile."

John Adams writes: "Oh wow, how sad! Peter was a huge influence on my first 15 years in the DC area early in my career. He was an intellectual beacon for almost everything that happened in OD and OT up until the meningitis.

"Upon receiving this news, my very first recollection had nothing to do with the field, however. When Peter came from UCLA to interview for the job at GW, 1972, I believe, he came and stayed with us in Fairfax, VA. Peter was an avid runner at that time – at least from my sedentary perspective, and so I pulled on some boating deck shoe (closest I had to anything resembling athletic sneakers), and tagged along as far as I could. That got me started, and within two years I had gotten fit enough to start playing rugby at AU, where we at NTL were just beginning to test the possibility of a degree partnership.

"Then about 8 years later, Peter was right in the middle of something Harrison Owen created, called the TWG Partnership – out of which grew the Open Space and Transformation movements. Our regular TWG dialogues around DC always could count on breakthrough insights from Peter.

"In a TWG meeting in about 1982, Harrison suggested creating an annual conference on Organizational Transformation, which soon became the Open Space movement, which Peter was deeply involved in from the beginning! I suggested putting together a book written by all the people that were beginning to talk about transformational processes in organizations, and again Peter was just about first up, offering to do a chapter. That became *Transforming Work*. He also was a powerful supporter of, and contributor to, the second anthology, *Transforming Leadership*.

"We could all always count on Peter to grasp and contextualize new ideas and

build on them for the good of the field and all of its practitioners. He was a giant in my eyes always!

“God bless you Peter! We’ll have to check in again later and reminisce further.”

Kurt Motamedi writes: “Peter Vaill is remembered as an outstanding scholar, practitioner, teacher, insightful observer, kind soul and true intellect. I met Peter in my first year of doctoral program at UCLA. I was intrigued by his depth of knowledge and philosophical perspective. I missed the opportunity to learn from him – he was denied tenure at UCLA. And then, his tenure denial was reversed (an unusual event). He left UCLA regardless with positive determination. He said that it was meant for him to move on. I was puzzled by his decision to turn down the offer of tenure. A few years later, Craig Lundberg, another

silent giant in our field, shared with me Peter’s six-page letter to him. A sentence in that letter startled me, “So much of the research in our field is about describing a car as a moving vehicle.” He could see through puffed up academic research empty of a meaningful sense of reality and real world.

“Yes, Peter shaped the organization development movement among many others to be mindful of everyday experiences, reflection, learning and being in the world. He was a quiet giant who traversed among us always with a warm reflective smile – caring that all this will pass. Blessings bestowed, Peter.”

Judith Katz writes: “It is indeed sad to hear about Peter’s passing. He was such a generous spirit. Fred and I worked with him several times (along with Edie) and each

time was inspirational. He brought so much as a human being as well as an OD Practitioner. He will be missed . . . but his ideas about permanent white water are even more true today.”

Fred Miller writes: “I join Judith’s comments. Peter was a friend. As Judith indicated starting in the 90’s Judith and I did several workshops with Peter including an NTL Management Work Conference (using T-Group technology). As many times as I heard Peter present and share his thinking I could never get enough. I always wanted a front row seat (sometimes moving the participants out of the way). What a GIFT!! What a human being! What a thinker!!! So glad he shared his thinking and his being with so many people, and that his and my paths joined together so many times.”

SPECIAL ISSUE: **Use of Self in OD**

We are very pleased to offer this special issue on **Use of Self**. It ended up overlapping with our final analysis and writing of our Global Research Report, which like everything has also been impacted by the worldwide coronavirus pandemic. This issue has attracted a set of articles from a wider than usual global OD population. We have stayed as close to our ODR Guidelines as possible, while also acknowledging that some cultures use some different spellings in English and may use slightly different ways of referencing sources. This may give us some insight into becoming a more global OD journal in the future.

This special issue adds more thinking and experiences to many previously published works in our journal (previously the *OD Practitioner*), the *OD Journal* (from ISODC) and others. We are pleased to bring together some people who have discussed this concept before with some that are sharing new thinking to help us progress in grounding and expanding our understanding of Use of Self. There are some pieces here from educational, clinical, process and personal experience perspectives, as well as mindfulness, love and self-inquiry.

In the opening article, **Matt Minahan** and **Russ Forrester** have developed a process model for use of self based on Arthur Young's Theory of Process (Young, 1976). They walk us through various stages of freedom and restraint as we deal with ourselves while dealing with our world. This model helps us to understand the many phases we go through throughout our lifetime and some stages we repeat in every situation we encounter. In the end we learn about ourselves and develop who we are in action.

The next article takes us into *self-inquiry*. **Sharon Nash** takes us on a

journey across different cycles of inquiry covering identity, presence and meaning. She uses her own analysis in depicting how this informs our understanding of use of self and culminates in her version of use of self, based in these premises.

In the next article, **Tong Yee**, an entrepreneur and social activist from Singapore shares his journey through serious internal work in figuring out how his effectiveness was directly linked to cultural mindsets within the systems he was in and within himself. He makes a strong case for the connection between systems and use of self.

Bena Long shares a short piece on how mindfulness belongs on our use of self radar. She suggests ways that mindfulness helps in focusing attention and expanding awareness, both inside and in the context around us. This work brings forward a way to make the 'self' more available.

Tom Kenward discusses his learnings in designing and working within a participatory learning process in which learners can learn more about their use of self. He discusses how the process contains three elements that deepen self-learning: learner-defined learning outcomes; collaborative learning design; and facilitating self and peer assessment.

OD and love is the topic for the next article by **Helena Clayton**. She raises a strong challenge for the importance of including love in our work and our use of self. Following a research study on the topic, she shares her findings and implications for the field and our practitioners. She discusses ways that love is radical, a core human need and almost depleted within organizations.

Kathy Holmes-Bonney highlights the importance of the deep unconscious web of communication that operates in groups. Staying present to what is 'here and now' in the group and managing one's self to not be distracted or pulled in a way that reduces one's ability to provide

help to the group, is most critical. She further discusses the role of the OD person holding their use of self in the right manner to enable the group to process and resolve its own issues.

Anton Shufutinsky provides a nice view into the importance of use of self in conducting qualitative research. He reviews the essence of qualitative research and how to make it most valid and useful. This can involve effective use of self to ensure credible interpretations of data, using rigorous methods, while simultaneously convincing readers that the conclusions are plausible, unbiased, defensible, and trustworthy.

Finally, two of our educators in use of self, share their key learnings in running the Use of Self course in the American University's MSOD program. **John Bennett** and **Heather Berthoud** discuss some of the frameworks they use and experiences and learnings they have accumulated in helping others to learn about and begin their own use of self journey. The learnings are valuable for anyone developing themselves or others.

Mee Yan Cheung-Judge and **David Jamieson**, the Guest Editors, provide an overview of the work they generated with the Global Use of Self Research Study, which was recently launched as a report available to all at the end of the article.

Practicing OD

In this issue's *Practicing OD* section, our editors have garnered an article on employee involvement. **Diana Vienne** writes about how employee involvement is key in commitment and successful change. She introduces their Notion Engagement Continuum highlighting different stages employees go through.

Please enjoy these latest contributions on Use of Self.

David W. Jamieson, PhD
Mee Yan Cheung-Judge, PhD

Exactly How Do You . . . Use Yourself?

By Matt Minahan and
Russ Forrester

By now, OD circles have accepted “Use of Self” as having been delivered on the tablets handed down by our forebears over the years in OD. It is taught about in OD graduate programs. It is written about in practitioners’ journals, student theses and reflection papers.

We have a fairly long but thin body of knowledge about use of self. Most of the writing on the topic has been focused on the counseling and therapeutic worlds, starting in 1932 (Alexander, 1932). Since then, there has been approximately one journal article every decade (Goffman, 1959), (Jung, 1964), (Weiner, 1978), (Nevis, 1987), (D. Jamieson, 1991). By 2000, OD began to figure out how to apply these principles, developed in psychotherapy, to our work as consultants (Cooperrider, 2000), (Cheung-Judge, 2001), (Seashore, Nash, Thompson, & Mattare, 2004), (Senge, Scharmer, Jaworski, & Flowers, 2005), (Patwell & Seashore, 2006), (D. Jamieson, Auron, & Schectman, 2010), (Nash, 2014), (Rainey & Jones, 2014), (Forrester & Minahan, 2019), (Bennett & Berthoud, 2019), (D. W. Jamieson & Davidson, 2019).

The body of knowledge around use of self is still developing and has not yet become coherent. It mostly resembles the “prescience” stage, lacking a generally recognized central paradigm (Kuhn, 1962). After some time in prescience – a term that is notable for its similarity to prescient – an idea enters “normal science” which is defined by an agreed upon central paradigm during which extremely productive “puzzle solving” research occurs. Kuhn

goes on to describe the next period, when anomalous research findings build up to the point when a new paradigm emerges.

It is likely that our body of knowledge about use of self is the result of a couple of post-paradigmatic shifts, one from the world of industrial engineering about effective change processes, and the other from the world of psychotherapy where the grounding paradigms of the 1950s–1980s were about which techniques of therapy (Adlerian, Rogerian, Gestalt, etc.) and which regimes of medication (daily, weekly, monthly, by mouth or injection, in combination with which drugs, etc.) were most effective. It is likely that the research in those two domains and possibly others from social psychology and other related fields exhausted itself, causing established paradigms to gradually reach the end of their natural lives in the 1980s and 90s, bringing forth the early stirrings of 21st century thought.

Simultaneous paradigm shifts in leadership, organization theory, business process simplification, communications, and the social sciences may well have contributed to this state of prescience for use of self.

The evidence points to a body of knowledge and thought around use of self still in its infancy. There are few shared concepts. Each author brings a unique definition, perspective, and voice to what use of self means. Some have advice; some have models. There are no unifying theories or models or methods or even academic citations that create congruence across these few sources.

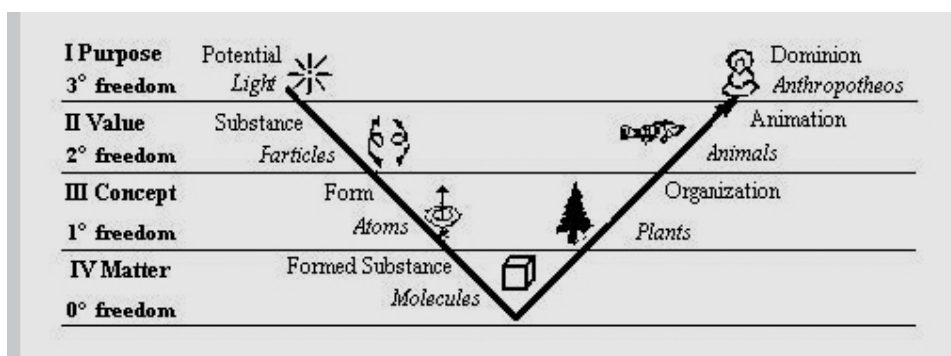


Figure 1.

(Barr, 2006)

Despite the fragmentation of knowledge in our field, there is substantial grounding in philosophy and psychology to guide our thinking.

The very term “use of self” connotes reflection and interiority and self-examination, making the self and its actions the object of our attention; we say as much in our model below.

However, we also believe that whatever actions the self takes in pursuit of its own development and insights are in fact *actions* and *re-actions* in *inter-actions* with others. “The I of . . . I-You appears as a person and becomes conscious of itself as subjectivity . . . Persons appear by entering into relation with other persons.” . . . “The I is actual through its participation in actuality. The more perfect the participation is, the more actual the I becomes” (Buber, 2012). It might seem a bit paradoxical, but the route to knowing our self and refining the way the self operates in the world is actually through relationships and communications with others.

There are also insights from theories of adult development psychology that underpin the Use of Self Process Model. Jane Loevinger’s Ego Development (1976) follows the arc of maturation from conforming to self-awareness to conscientious

to autonomous to integrated, as does our model.

Another developmental model that tracks through the Use of Self Process model (Sullivan, Grant, & Grant, 1957) is described in terms of successive levels of integrations, each of which has its own unique characteristics, as do the stages in our own model.

In addition to the lack of coherence in our field, there is no common guidance about exactly what or how this use of self might occur in a given setting or period of life, or what use of self means in practice, and none have ways to determine how *well* you are using your self as an instrument. We are hoping to address that by the Use of Self Process Assessment, a link to which you will find at the end of this article. We invite you to answer the questions in the online self-assessment, which we will score confidentially and return the results to you via email.

The model itself is rooted in the revolutionary theory about evolutionary process of all living systems by Arthur M. Young (1976), who was a physicist and philosopher in the mid to late 20th century. He wrote about the ways in which light, with the most potential freedom, over time becomes binding particles or

substances with less freedom, taking on more form centering in atoms with another degree less of freedom, and then creating a formed substance in molecules, which have the least freedom.

Over time, freedom increases as the inert molecules become organized, first into plants, and then animated as animals, and finally evolve into full being (Figure 1).

In the field of OD, the most recognizable application of Young’s process theory to teams is the Drexler-Sibbet Team Performance Model. (See Figure 2, page 10.)

Our Use of Self model applies the same Arthur M. Young framework – increasing complexity and decreasing degrees of freedom over time, a pivot or commitment point, leading to decreasing constraint and increasing freedom. (See Figure 3, page 11.)

The Use of Self Process Model describes seven stages by which we engage with ourselves as we engage with the world. It is a reciprocal cycle. As we grow, learn more about ourselves, and become more in touch with our own inner thoughts and feelings, we are able better to relate to events and people in the outside world . . . while at the same time, if we are paying attention, our interactions with the outside world can be the ground on which we discover new depth and insights about ourselves.

In general, the stages are slow to evolve, and we work through them over a period of years and sometimes even longer, especially stages 1, 2, 6, and 7.

However, we note the three stages outlined in green function differently. These three stages are the Experience Cycle. We work through these stages with every client engagement we encounter. In stage 3, Self in Situ, we make a choice to attend to a situation. In stage 4, Self in (Inter)Action, we engage with the situation and take action. In stage 5, Reflective Self, we learn from what has happened. When we encounter a different situation, the cycle begins again. It is the continuous repetition of this cycle, and the lessons that we draw from it, that enable our growth into the sixth stage, Intentional Self.

The evidence points to a body of knowledge and thought around use of self still in its infancy. There are few shared concepts. Each author brings a unique definition, perspective, and voice to what use of self means. Some have advice; some have models. There are no unifying theories or models or methods or even academic citations that create congruence across these few sources.

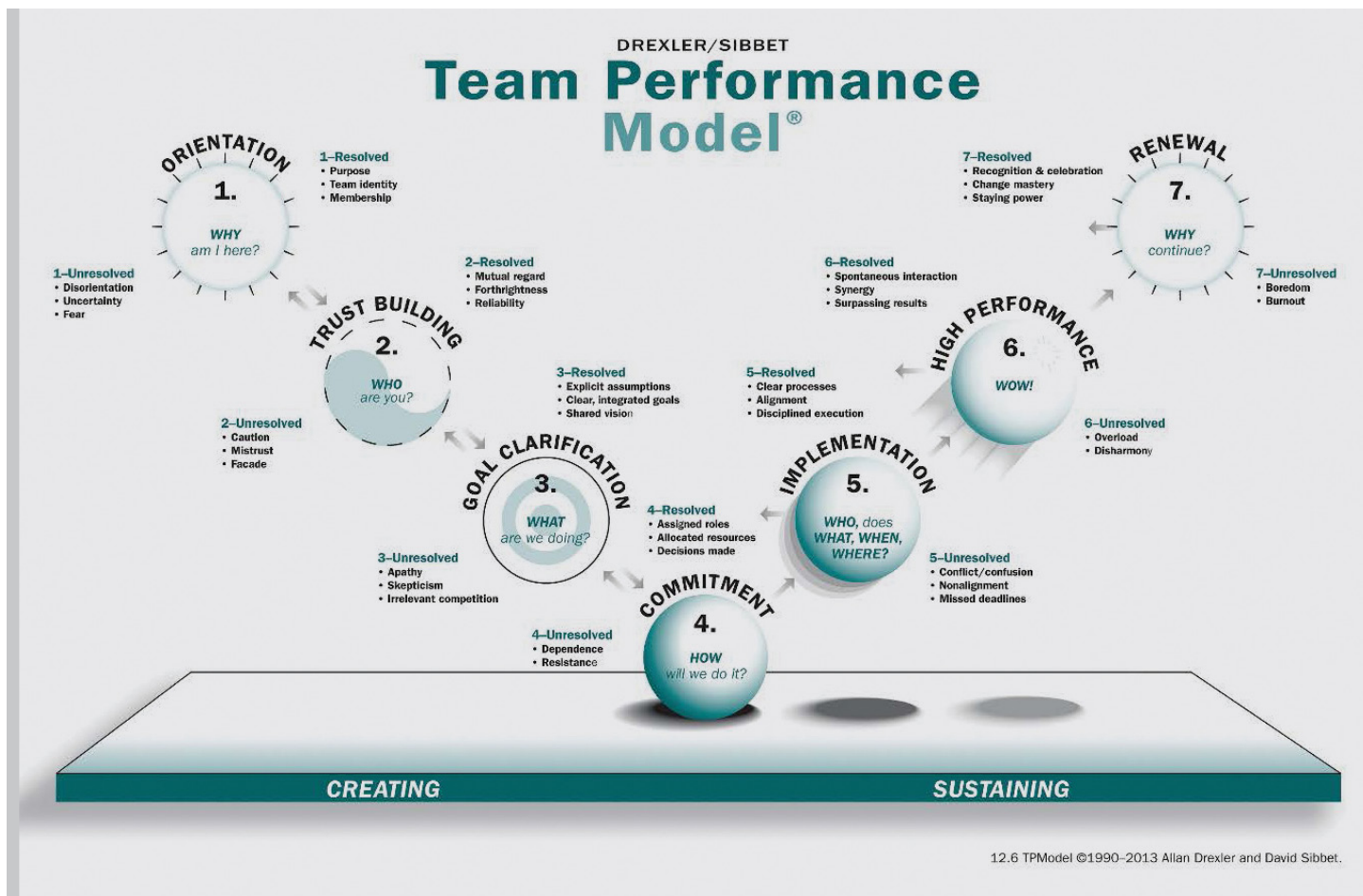


Figure 2.



The Presentable Self: The model begins with the most free, least constrained self we can imagine. This is the nascent, natural, default, not-deeply considered self. The superficial, socially acceptable self that we are readily willing to show to others and to see in ourselves – our “perfect” self, blind to our flaws or mistakes.

And so it is really an imaginary self, a fiction created by the norms or expectations imposed by others and accepted by us without questioning. This is not the true self that we will become, but it is who we are willing to accept and to present to others

right now. We are living in our positive core of goodness in terms of personality, temperament, preferences, aptitudes, talents, and virtues, not yet ready to confront the less positive aspects of ourselves.

One may spend a considerable period of time in the pretense of the Presentable self. This stage encompasses the characteristics of three of the early stages defined by Loevinger: the “Impulsive” stage in which people are typically dependent and needy, pigeonholing others by how the others meet their needs; the “Self-protective” stage, in which individuals recognize social rules and are guided by rewards and punishments; and the “Conformist” stage, wherein one’s actions are driven by social desirability and shaped by the avoidance of disapproval.

Sullivan et al. also describe several stages of development that match up with life in our Presentable stage: Their Level 2 is defined by constant demands, unaware of others’ feelings, and without regard for the consequences of their actions. At their

Level 3, individuals, typically conformists, demand simple rules and absolute role definitions in order to know exactly what is expected of them. Our conception of the Presentable Stage coincides with these earlier developmental models.

The Work of this stage is largely forming. At first, the incipient self shapes itself to fit the expectations of others, to please them and be accepted, to maintain the pretense that we are what we ought to be. By being blind to our own flaws and negative impulses, we don’t often recognize our contributions to breakdowns in relationships. This is a relatively passive stage in which things are happening without much reflection, self-awareness, or deliberate effort.

We are *ready to move on* when we recognize in ourselves a feeling unfulfilled or stymied, or find ourselves seeking, desiring more substance in life.

The Work of this stage is disrupting – breaking the veneer of our superficial selves and coming to grips with our true self. It is about removing the gloss of the supposed perfect self, and exploring more deeply those parts of the self that undermine the image projected by the Presentable Self. This stage is about exploring and coming to grips with the “undesirable” parts of the self, those that are not socially acceptable or consistent with what I want to be known for. This is also about calling into question the default conceptions of the Presentable Self, embarking on a discovery mission to find the true self.

We are *ready to move on* when we can accept our light and dark sides as equally important and valuable sides of our selves.

When entering the Experience Cycle, the self is confronted with specific circumstances beyond itself that must be dealt with and acted upon. This cycle repeats itself multiple times as a person encounters the outside world and must make choices about if or how to engage with it. Each repetition of the Experience Cycle provides an opportunity for the self to try new behaviors, seek feedback, reflect upon the results, and make different or better choices each time.

We may have a sense of disillusionment with the world we have constructed so far in life. We may feel tentative and even embarrassed about some of our past behavior and actions, but that is often followed by a sense of resettling into a new normal that can help to establish a grounding that lasts a lifetime.

A Transition: Before moving on to the elements of the lower tier, we must recognize that the discoveries associated with the first two stages, the Presentable and Emergent Selves, do not necessarily occur discretely or chronologically. The key thing about making progress toward the Experience Cycle and then the Intentional Self is that we recognize and acknowledge all aspects of our personalities and how they contribute to the overall shape of the self.

Entering the Experience Cycle: The next three stages, together referred to as the “Experience Cycle” are substantially different from the first two and the last two, which are mostly about the self and its growing knowledge and awareness. When entering the Experience Cycle, the self is confronted with specific circumstances beyond itself that must be dealt with and acted upon. This cycle repeats itself multiple times as a person encounters the outside world and must make choices about if or how to engage with it. Each repetition of the Experience Cycle provides an opportunity for the self to try new behaviors, seek feedback, reflect upon the results, and make different or better choices next time.

an assessment of the situation and choose a course of action.

The central questions are about whether the situation warrants our attention, the quality and amount of attention that we pay to it, the care and thoughtfulness with which we assess it, the consideration of our options for action, and our preparation to engage.

Since the Self in Situ stage depicts the sizing up that needs to be done in a particular situation rather than a general state of being, there is not a direct counterpart to the stages set forth by Loevinger or Sullivan, et al. However, there is a match between the behaviors we find in this stage and some of those described by the other authors, which are enabled by the progression through the stages. For example, Loevinger attributes the “appreciation of multiple possibilities in situations” and awareness of one’s own feelings such as embarrassment, confidence or self-consciousness as manifestations of the transition from Conformist to Conscientious stages. Her Conscientious stage notes an expanding sense of responsibility for other people, and a recognition of the complexity of distinctions between ‘right’ and ‘wrong’. In the same vein, Sullivan et al. describe some typical Level 5 characteristics: recognition of behavioral patterns, a capacity for empathy, understanding other people more, and responding to them as complex individuals. All of these features are needed to do the work of Self in Situ well.

The Work of this stage is readying the self for action. This requires an awareness of our own thoughts, feelings, intuitions, dispositions, and reactivity. It requires paying attention to others’ behaviors, appearance, reactions, apparent states, and the impact of our behavior on them. It requires consideration not only of the current event, but preceding events, context, history, local culture, possibilities and limitations. Attending to all of this and making sense of what is happening requires the self to be present, open, concentrated on the situation and the other person(s), willing to take risks, and aware of possible discomfort. It requires a choice to act or not, and if so, how. To do this well, we have to



Self in Situ: In this stage, something is happening that we can either engage in or ignore. This is the moment in which the self is aware of and makes a choice to attend to a person or event, to be present to the situation, and the possibilities of a positive or negative outcome, or not. We make

acknowledge our own subjectivity, be in touch with our beliefs and values, and be curious about the people and situation.

We are *ready to move on* when we have taken in as much data about the situation as we can and are ready to take action. We may have an accurate assessment or not. We may be ready or not. We may be successful or not. But we are in touch with ourselves, prepared to engage and poised to take deliberate action.



Self in (Inter)Action: Having assessed the situation and our ability to act in it, this is the moment in which we speak, or don't. Both are an (Inter)Action. This is the moment in which the self takes action in the situation to achieve the desired result. This could be anything we do, or don't do, to communicate, intervene, make contact, or influence things. This is the moment the self engages directly with the situation or person, with more or less skill, and with more or less success.

The central questions here revolve around how to intervene, with whom, with what data, with which approaches, when, etc. The focus in this stage is the quality and effect of the action taken or foregone. The quality of action is conditioned by the work not only of the preceding stages but the later ones, particularly Stage 6, integrating. The same is true for the other models we have been tracking. For example, Loevinger's Individualistic stage refers to an increased ability to tolerate paradox and contradiction. Her Autonomous stage includes the capacity to acknowledge and cope with contradiction. For Sullivan et al., Level 5 includes the need to play roles that may be felt to be ambiguous or incompatible. Though these other models don't contain a direct counterpart to Self in (Inter)Action, successful action in this

stage is dependent on a comparable flow of development.

The Work of this stage is any action to communicate, be direct, reframe, express support or affection, challenge, confront difficult issues, address power dynamics, engage conflict, listen, inquire, experiment or take risks. In short, this is the full range of things the self can say or do, or not do, to show up in the situation. It requires risk taking, persistence, empathy, emotional availability, respect, positive regard, openness, a willingness to self-disclose if appropriate, a willingness to be a force in the moment, and a wide behavioral repertoire. Once we take action, we are in the moment of least freedom and most constraint because we have acted, or refrained from acting, in a particular way. Once done, the action or inaction can't be erased. It can be nullified by a later action, but in that particular moment what is done is done. There is no taking it back.

We are *ready to move on* when we have completed the (Inter)Action. We will have engaged, made choices, and something has happened as a result. We are inquisitive about it and open to the full range of possibilities that might arise from our choices and the ways in which we have acted in that moment.



Self in Reflection: Having completed an (Inter)Action, we notice the immediate experience and are curious about what happened and why. We reflect on the meaning of the event. We explore the learnings for the self, including what worked and what didn't in the (Inter)Action, we notice and reflect on what happened to and with others, and we begin to incorporate those learnings into the body of our own experience.

The central questions here revolve around learning. We notice what happened in the event. We notice our own personal subjective experience of the event and our own role and behavior in the situation. We are curious about what might have motivated our and others' action. We notice the differences between intent and impact both for ourselves and others. We begin to consider what might happen next.

Neither Loevinger or Sullivan et al. have stages or levels that are explicitly about reflection and learning. However, the movement through their stages or levels implies a widening capacity for learning. Loevinger refers to "differentiated self-criticism" and the inclination at the higher levels to "evaluate and choose the rules for yourself." She also notes the heightened sense of individuality that accompanies the Individualistic stage, a sense that has to be derived from learning and reflection. The seven levels defined by Sullivan et al. are each characterized by a specific problem to be solved, such as the integration of continuity and the integration of self-consistency. Progressing through these problems implies the kind of reflection, learning and change posited in our Stage 5.

The Work here is self-examination and reflection. We revisit the event, choose the object(s) of our reflection, think about it, write about it, talk with someone else about it, and identify learnings about ourselves and others. This requires a large measure of openness, neutrality, humility, honesty, and responsibility. It also requires objectivity, ironically, about our own subjective experience of the (Inter)Action.

We are *ready to move on* when we encounter a new situation and restart the Experience Cycle all over again, armed with the lessons from this experience, starting to see general patterns and tendencies in ourselves and in others, which offer insights into our next trip through the Experience Cycle.

Completing the Experience Cycle: As we grow and pay more attention to the self and the results achieved in the world, we improve our ability to make better assessments when we are In Situ, in (Inter)Action, and in Reflection. This Experience

Cycle represents the fundamental process by which we learn, improve, and grow through our everyday interactions, assuming we are paying attention and make ourselves the object of our own reflection. We complete the Experience Cycle galvanized to act on our new insights and with a healthy balance in our assessment of our strengths, weaknesses, abilities to influence others, and how the use of our self can make those things happen. Multiple repetitions of the full Experience Cycle are indispensable to the insights needed to move on to Stage 6.



The Intentional Self: After multiple repetitions of the Experience Cycle, we begin to see patterns emerge both in ourselves and in others. We begin to make better choices about what to do and when to do it. We become more skilled at intervening. We now see the whole self, both the positive core and the shadow, embraced and reconciled in more stable and refined forms. We develop a world view and deep values that are reality based. We arrive at a more enduring clarity about our self and others. We are intentional about who we are and what we do in the world. This is about our maturing self.

After multiple repetitions of the Experience Cycle, we begin to see patterns emerge both in ourselves and in others. We begin to make better choices about what to do and when to do it. We become more skilled at intervening. We now see the whole self, both the positive core and the shadow, embraced and reconciled in more stable and refined forms. We develop a world view and deep values that are reality based. We arrive at a more enduring clarity about our self and others.

The central questions here are about developing an approximately accurate self concept and an articulated world view that we can explain and justify. We grasp clear beliefs and values for our self and our work. We have clear goals about what we want to contribute to the world and how to serve it.

The substance of this stage is most like Loevinger's Autonomous stage, which is defined by the capacity to acknowledge and cope with inner conflict; seeing reality as complex and multifaceted; recognizing the autonomy of others; and adopting self-fulfillment as a goal. Sullivan et al.'s Level 6 speaks to a surer sense of self-consistency, independence from restricting roles, and formulation of long-term goals and relations with others. In each of these systems, the keynote is a settling and coalescing into a mature self.

The Work of the Intentional Self is integrating, creating a whole from the many parts that have grown and been perfected over time. This represents the ongoing synthesis of both the Presentable Self and the Emergent Self, incorporating successive repetitions of the Experience Cycle, when reflected upon, continue to shape the self and its intentions. There are growing elements of self-knowledge, whole heartedness, patience with self and others, constancy, steadiness, and right choices for the self.

We are *ready to move on* when we develop, and are aware that we have developed, a sense of authenticity about who we are and what our core purpose is. We become more clearly focused on the few most essential elements of our life. We

become more purposeful about who we are and how we want to spend our time. We have less patience and lose interest in superficial ideas, and yes, even people who do not deepen our lives and selves.



The Transcendent Self: Returning us to the top of the model, this is the moment of maximal growth and simultaneously, the moment of least constraint. It is the passage of time, the accumulation of experience, and the continuous effort to reflect and learn over decades that bring this moment of depth. This is the stage of personal mastery. The Transcendent Self grows an ever-deepening connection to its own inner core while at the same time undertakes an expansive effort to reach out and connect with something greater than itself.

Personal growth has now become a way of life for this self, which can show up as physical, mental, emotional, and spiritual self-actualization. This can create an expanded behavioral repertoire, a healthy balance between constancy and change, a sense of being a part of something greater and unity with others that may well permeate the hard boundaries of individual self-identity. Freud's "collective unconscious" becomes figural for the Transcendent Self (Freud, 2012).

Loevinger calls her highest stage "Integrated", which she deems "rare". The Integrated stage involves transcending the conflicts typical of the Autonomous stage, and the "consolidation of a sense of identity. For Sullivan et al., the highest level of development is about the integration of relativity, movement and change. This internal integration allows for a turning outward and attending to the growth of others. One feature of our Transcendent

stage that neither Loevinger or Sullivan et al. address explicitly is what Maslow calls the “mystic experience” or “oceanic feeling” that characterizes self-actualizing people, a relatively small population.

The Work of the Transcendent Self is about mastery and actualization. The practice of reflection, feedback, and self evaluation have become habituated and are seldom compromised. The commitment to growth and learning is continual. There is a sense of tranquility in this self, which, when combined with curiosity and openness, make this person a wonderful role model and sought-after mentor for others.

There are numerous personal styles that play out differently in given situations, and almost unlimited ways of growing and embodying use of self. The principle of equifinality is hugely in play: there are a multitude of ways to be effective in deploying oneself, and at least as many ways to mess up. There are also an infinite number of combinations of qualities, traits, behaviors, strengths and weakness that might compose the state of use of self in any given individual.

Summary: We began our journey in a stage representing the highest degrees of freedom and a lack of external and internal constraint in the Presentable Self. We developed the capacity to see and accept a more nuanced, complex self concept, accepting the light and dark of our lives in the Emergent Self. We build our skills and refine our insights by the repetition of the Experience Cycle – by approaching a circumstance In Situ, engaging in (Inter) Action, and learning in Reflection over and over again. Now seeing patterns and habits in our selves and others, we sharpen the sense of who we are in the world in the Intentional Self, finally returning to the top of the model again, the moment of least constraint and most freedom in the Transcendent Self.

The stages are not clearly marked. They are not crisply bounded. There is no bright line or assigned date or age for movement from one stage to another. We can be working on the material from more than one stage at the same time.

Finally, there is no right or wrong or timetable to reach a stage in the model.

But we believe there is integrity in the model, built on Arthur M. Young’s Theory of Process, and that there are insights that might add to your knowledge and skill in the Use of Your Self.

Use of Self Process Assessment

Returning to the question in the title of this article, how do we know how or even if we are making good use of our self? Measuring effective use of self in practice is a tricky proposition. There are numer-

ous personal styles that play out differently in given situations, and almost unlimited ways of growing and embodying use of self. The principle of equifinality is hugely in play: there are a multitude of ways to be effective in deploying oneself, and at least as many ways to mess up. There are also an infinite number of combinations of qualities, traits, behaviors, strengths and weakness that might compose the state of use of self in any given individual.

Undaunted by the difficulty of measuring use of self, we have developed a prototype instrument to do just that. It is based on the terms of our model and is titled the “Use of Self Process Assessment”. It is a 35-item inventory that individuals can use to compare themselves to the theoretical ideals of each of the seven stages of the model, and identify strength and gaps in their own use of self.

This is obviously a work in progress, but we invite you to take the assessment online. If you provide an email address as part of your response, we will send you

the results and a brief interpretation. Your participation should shed some light on where you stand with respect to use of self, and will also provide us with an anonymous data base to continue to refine our own thinking about use of self and how to measure it. If you decide to complete the assessment, the online link is: <https://www.surveymonkey.com/r/NYNHLZC> Thank you for considering it.

Use of self is central to our work in OD and it is critical to our lives outside of work. It is gratifying for us to be part of the thinking and development about use of self, and we look forward to the field advancing from prescience to a full-fledged body of knowledge.

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My Journey into Self-Inquiry

By Sharon R. Nash

“Our best self is already here, not waiting to be discovered, but to be unveiled and liberated, through rigorous self-inquiry which helps us to change the consciousness of ourselves and others, one leader at a time.”

How it all began

Never has the debate about the role of the OD profession been more prolific, as we stand in the midst of nearly a decade of global economic disruption, geopolitical fragmentation and digital transformation, and on the edges of an uncertain future where artificial intelligence is no longer just a futuristic idea. Otto Scharmer (2016) designates our current world as *“moments of profound possibility and disruption which holds the seeds for a profound civilisational renewal.”* Scharmer proposes that *“now is the time to bend the beam back on ourselves and change the inner place from which we operate when we act, communicate, perceive or think, to see more clearly how we might be contributing to the systemic failures in organisations.”*

When I first came across this quote from Otto Scharmer, I was disturbed by the possibility that I might be a contributor to the frightful turmoil and dysfunctional leadership which prevails in some organisations today. It made me reflect on my leadership repertoire and respond to the subtle signs that I needed to retract, re-examine and readjust. Have you ever experienced an accumulating feeling of fragmentation of and/or disenchantment

with your practice? Or maybe at times you have struggled to bring the right presence to your client’s situation, despite your intentions, or simply felt that you were not doing your best work? These are some of the manifestations that brought me to the start of my journey into self-inquiry whilst undertaking an MSc at Roffey Park.

Yet it was with some trepidation that I entered the world of self-inquiry. Who wants to expose their deepest flaws and admit they are not bringing their best selves to the real issues that need attending to in organisations? This article charts my personal journey into the world of self-inquiry and explores some of the tensions and paradoxes associated with conducting research into one’s own practice, to surface and confront what obstructs or enables our best work.

What is self-Inquiry?

The concept of self-inquiry has been conflated with first person inquiry, action inquiry, and autoethnography, to name a few. It is nested in the eminent OD ideology of ‘use of self’, which is generally understood as being both a way of bringing one’s *self* to the work of OD and an intent to affect the systems within which we work.

Judi Marshall (2018) describes inquiry as a process which has multiple textures, layers, and dimensions:

“inquiry is a continual weaving between inner and outer arcs of attention, seeking to notice ourselves perceiving, framing,

interpreting and making choices about action, acting and sensing outside ourselves, and testing assumptions and interpretations with others."

As a methodology, self-inquiry is fraught with imperceptible boundaries as it has no discrete paradigm of its own. Based on my experience, I would define it as a process of profound self-curiosity and discovery which results in a deeply evolving consciousness, cultivated over time, with no hard borders or containers. I therefore perceive self-inquiry to be the vehicle or channel

and expansion all weave a pattern of working to enhance the effectiveness of ourselves and organisations, a key principle of OD practice.

Disappointingly, the many concepts associated with 'use of self' have not been integrated into something that can be understood at a more practical level. Additionally, none of the theories that I explored sufficiently addressed the more fundamental question of how to attain intimate knowledge of one's self in action. I believe that as a profession we need to do more work in this area.

Based on my experiences, my premise is that changing the way we think about our roles as OD practitioners starts with confronting the legacies of our own leadership. By holding the mirror up to ourselves, it is conceivable that we will be better placed to see the blinds spots in our profession.

for working towards optimum 'use of self', and in that regard, I see both concepts as being intimately and inextricably entwined.

'Use of Self' in OD Literature

My research into self-inquiry and the wider concept of 'use of self' produced multiple notions of the self, the whole self, presence and a masterful use of self. For example, Jamieson et al (2010), instituted a broad, multi-dimensional perspective and defined the use of self as *"the conscious use of one's whole being in the intentional execution of one's role for effectiveness in whatever the current situation is presenting."* This definition has ideologies of consciousness, wholeness, intent and adaptability and by intimation, a need for all aspects of the self to be aligned for maximum effectiveness. Nevis (2001), promoted the Gestalt notion of 'presence' in the consulting process, and emphasised the need for consultants to amalgamate values, attitudes and skills in a way that evokes positive action from clients. Senge (2006), brought awareness to a *masterful use of self*, denoted as *"learning to expand our personal capacity to create the results we most desire."* The collective threads of effectiveness, positive action

My practice within the wider field of OD has always had change at its core, rooted in diagnostic theories and systemic practice, and infused with more progressive, possibility centred approaches as my practice has evolved. I have at times experienced a tension between working intuitively and adopting a more systematic approach to solving problems for my clients. I have also sensed and suppressed a more intuitive style of leadership and became curious about my desire to move away from the more rational, linear approach which dominated change efforts.

What I wanted to discover about my 'use of self' also had many subtleties. I wanted to make sense of how I positioned, interjected, evoked, and challenged. I wanted to confront my own perceptions about how who I am shapes and contains my practice of OD. Judi Marshall (2016), describes this as *'living life as inquiry'*, being curious about what is happening in the moment, and the role that we might be playing in creating and sustaining helpful and unhelpful patterns of behaviour in organisations. My sense was that self-inquiry was something uniquely personal and had to be experienced in its inimitability to be understood.

How is self-inquiry relevant to current OD challenges?

Based on my experiences, my premise is that changing the way we think about our roles as OD practitioners starts with confronting the legacies of our own leadership. By holding the mirror up to ourselves, it is conceivable that we will be better placed to see the blinds spots in our profession. We only have to ask ourselves *'what effect are we having on leaders in organisations'*, to see how self-inquiry might be helpful. Professor Dennis Tourish (2019) lays bare the stark reality of leadership in organisations today, which he perceives to be *"rid-dled with the ideology of heroic individual's adept at transforming the attitudes, behaviours and emotions of more or less compliant followers."* He suggests that it is this obsession with heroic leadership that has led to the hegemony of *'leadership hubris and unbridled narcissism.'*

What struck me about this narrative is that despite the undeniable evidence for a new leadership rhetoric, the obsession with disastrous leadership archetypes who are rewarded for failure continues to flourish. How we bring ourselves to the leadership challenge demands that we embrace the notion of 'honing our instrumentality' at its deepest level, and engage more purposefully in soul-searching, self-disruptive inquiry ourselves. When was the last time that you considered your leadership repertory and the inner place from which you operate? Are you actively keeping the light of your OD practice alive or are you futilely stoking its dying embers?

Consider for a moment why the perpetual axiom as to whether OD is dead or dying continues to be reignited. I was struck by this recent quote by Matt Minahan; *"unless we wake ourselves from this reverie, the field as we know it now will be irrelevant in 10 years and extinct in 20"* (Minahan, 2019). This bold statement continues to fuel the debate about how we create the agility that we need to continuously disrupt and adapt ourselves, help leaders to navigate uncertainty, and stay true to our foundational humanistic OD values.

This is exactly what we expect of our clients, but are we doing enough

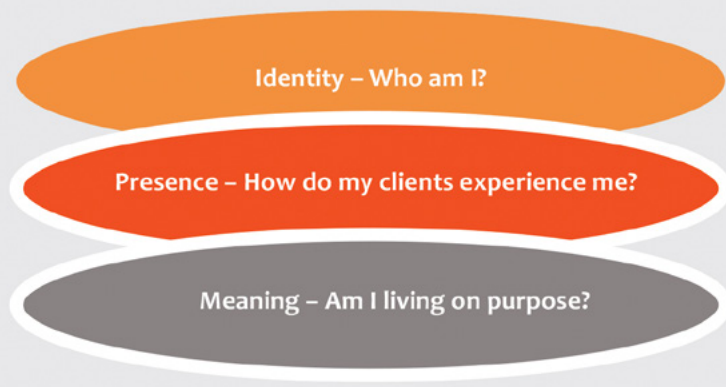


Figure 1. Cycles of Self Inquiry

to bring about that agility and commitment to change in ourselves? There is a lot to be learnt from the start-up mindset which enables businesses to ask the tough questions about their very existence and allows them to pivot in an instant and readjust. That kind of agility requires me to confront any self-serving assumptions about how I need to show up as a leader, realign my practice to the current challenges in organisations, and remain relevant through continuous reinvention. **Here is how I did that.**

A Practical Approach to Doing Self-Inquiry

My model of 'use of self' came to life by turning my burning questions about my practice into inquiries, i.e. who am I, how do I show up, and how do I know when I am working in harmony with my true purpose? My research evolved into three cycles of self-inquiry, based on real life experiences with clients. Each of my inquiries were conducted through both self-reflection and co-inquiring with others. Each subsequent cycle built on the previous one,

and prompted me to look at identity, presence, purpose and meaning, as shown in Figure 1.

The data which emerged from my inquiries was both rich and nuanced, and attempting to synthesise some sense of coherent meaning from it, was undeniably a messy business. Working both intuitively and systematically, I noted that the first discernible theme appeared to have associations with identity and knowing who I am, with dimensions of the *self*, the *whole self*, limiting beliefs, self-doubt, and the *shadow self*. The second detectable theme aligned to a conscious and intentional use of self, and weaved together threads of presence, awareness, consciousness, power and intent. The final theme had components of authenticity, living on purpose, solution focus, expertise, and working within the boundaries of the client/practitioner relationship, all of which had an underlying melody of purpose and meaning. The consolidated data from my inquiries is captured in Figure 2.

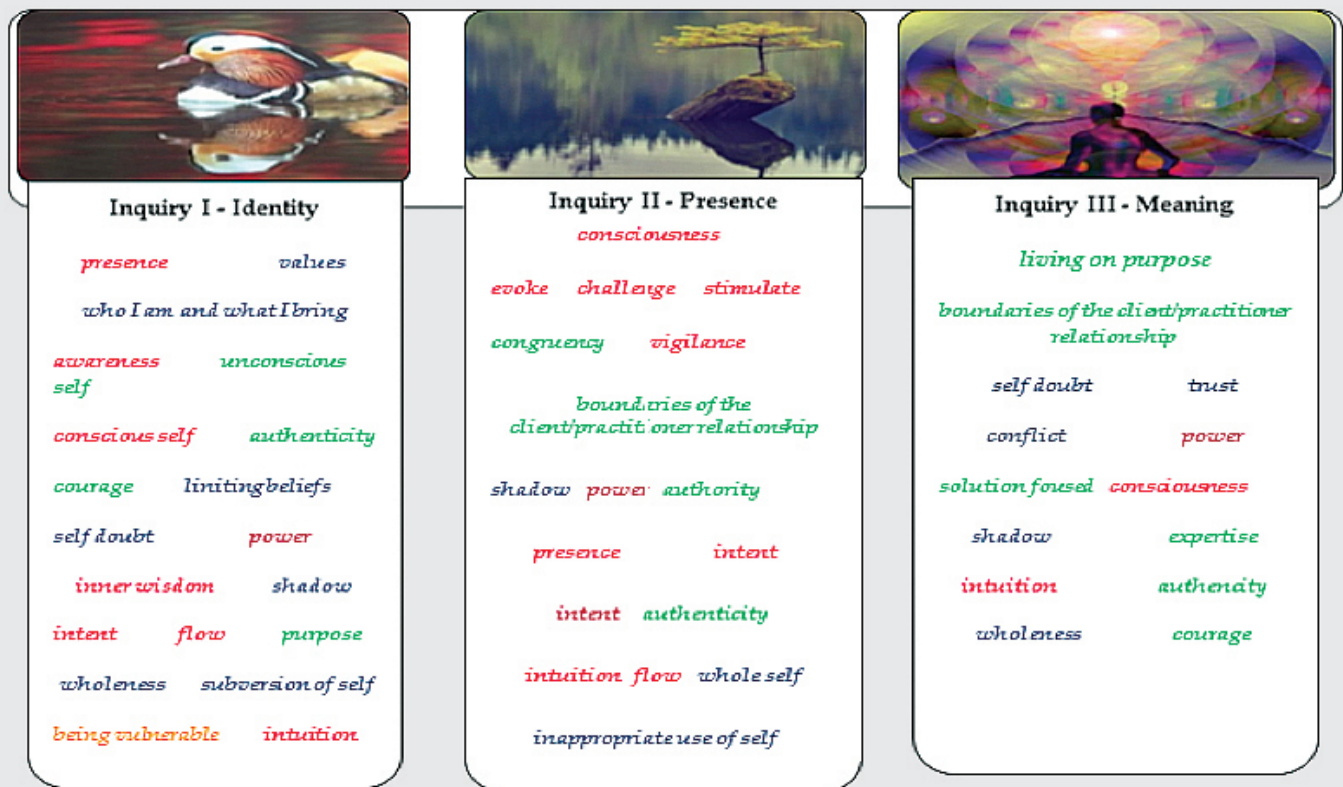


Figure 2. Consolidated Research Data

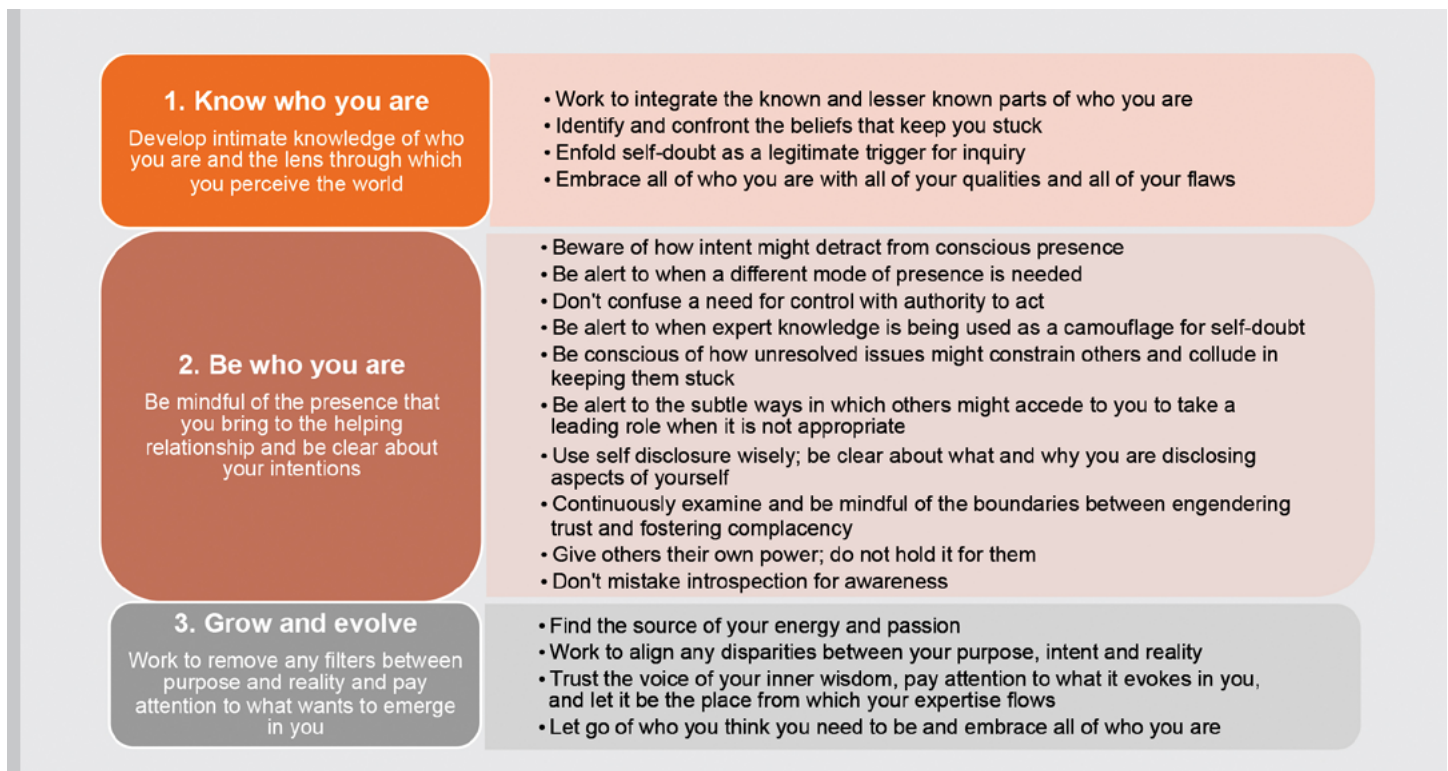


Figure 3. My Model of Use of Self

On completing my analysis, I noted both synergies and separation between my experiences and what the OD literature contributed to the concepts of self-inquiry and 'use of self'. I therefore conducted a deeper analysis from which I distilled my own model of 'use of self' (Figure 3).

In the section that follows I will explore my model in more detail to bring to life the transition I made from conducting my inquiries and discerning an emergent model.

1. Know who you are; develop intimate knowledge of who you are and the lens through which you perceive the world

Whilst conducting my first inquiry, I was struck by a quote from the Greek philosopher George Gurdjieff: "If you want to understand your true nature, first you must attain your original substance." I hadn't fully appreciated the true meaning of Gurdjieff's quote until I was half-way through my first inquiry into identity with my coach. The primary purpose of this inquiry was to come to a clearer understanding of my 'true self', by understanding how my formative upbringing has shaped who I am today.

There were various threads which emerged, some of which were quite nuanced. Where I perceived my ethos to be

about working with authenticity and helping others to come to their awareness, I discovered that my actions were occasionally driven by self-doubt and a need for control. My coach and mentor helped me to realise that this potentially stemmed from my childhood perceptions of being the inferior sibling and an inherent desire to prove my abilities. This I discovered was also the source of my drive for perfection.

There are two streams of theory which resonate with my own experience of attaining my original substance as described by Gurdjieff. The first is from Kate Cowie, author of Finding Merlin (Cowie, 2012). She declared that "as we grow in our human development, we achieve greater and greater awareness which arises from a dynamic

integration of many different developmental experiences." Another helpful perspective drawn from the work of Karen Izod (2018), is that "our identities provide us with 'interpretive structures' through which we can begin to make meaning." Both Cowie's and Izod's philosophies advocate that we need to integrate our experiences and associated personas as we develop to get clarity about who we really are.

So, what did I conclude from this inquiry? That it is possible to hold multiple personas which can in turn create disparities between our intentions and actions. These disparities may exhibit as a paradox of behaviours, which may include:

1. Holding polarities of outward self-confidence and inner self-doubt

Where I perceived my ethos to be about working with authenticity and helping others to come to their awareness, I discovered that my actions were occasionally driven by self-doubt and a need for control. My coach and mentor helped me to realise that this potentially stemmed from my childhood perceptions of being the inferior sibling and an inherent desire to prove my abilities. This I discovered was also the source of my drive for perfection.

2. Holding on tightly to perfectionism and control to prove that we are good enough
3. Not allowing ourselves to be vulnerable enough to make mistakes and learn from them
4. Suppressing intuition and defaulting to expert knowledge to validate our credibility

Do any of these behaviours resonate with you? *Figure 4* lists a few simple but powerful questions to challenge your own perceptions about your identity:

My key lesson learnt from my inquiry is that past experiences cannot be isolated from current reality. My experiences have shaped my identity, which cannot be singularly defined. It is a blend of my social upbringing and its associated schemas and beliefs, how I see myself in terms of my purpose in the world, the working assumptions that I have made about how I need to show up as a leader, the intent that I bring to my work, the nature of my profession and the work that I do with clients, and the relationships that I have forged with others. Attaining an intimate understanding of these complex and at times competing factors demands conscious intent, vigilance and a consistent mode of inquiry, reflexivity and adjustment.

Some final thoughts on identity.

- » Whenever you experience a negative emotion about the effect you are having

as a leader, enfold it as a legitimate trigger for inquiry

- » Identify and confront the beliefs that keep you stuck
- » Work to integrate formative beliefs with who you are today
- » Embrace all of who you are with all your qualities and all your flaws

2. Be who you are; be mindful of the presence that you bring to the helping relationship and be clear about your intentions

My second inquiry was about the role I intended to play in a client leadership meeting with a business that was struggling to get traction towards its strategy. My aim was to bring a quiet but purposeful presence to the meeting, to listen and notice what needed to be attended to, and to evoke a deeper conversation about what was keeping this business stuck.

Instead I found myself assuming a leading role when the CEO failed to step into that space. Throughout the meeting I sensed my presence shifting between competing modes, wanting to act and holding back, and noticing how that felt, like being stuck in an elevator between floors. Amy Cuddy (2018) describes presence as *“momentary and fleeting, an ability to access your best skills, knowledge and expertise and bring them forth in your best moments. It is not a permanent, transcendent mode of*

being.” It struck me that the presence that I brought to that meeting had been less fleeting and more fixed in my desire and intent for a pre-determined outcome.

Seashore et al (2004), position ‘*intentionality*’ as a key OD principle and contend that *“use of self is putting action into our best intentions towards some desired new state of affairs.”* My challenge to the notion of *intentionality* comes from the founding father of gestalt therapy Fritz Perls, who questioned *“how is it possible to be unattached to outcome, fully in the moment, and yet have an agenda.”* I wanted to deliver a good outcome for this client, however whilst fixated on that intent, there were wider issues of power playing out that went unnoticed, not least the subtle ways in which others might have silently acceded to me to be the one that challenges and coaxes into action. This experience reinforced for me that assuming authority for others can have the effect of keeping them reliant on my intervention and subvert opportunities for learning.

I concur with Perls that it is extremely difficult to adopt multiple stances of intentionality, being both apart of and apart from the client system, whilst working to maintain a presence and awareness which enables me to perceive, understand and attend to what is needed in the moment. The risk of internal filters getting in the way of our intended presence can however be minimised, by bringing awareness to our unconscious thoughts

Self Inquiry Questions - Identity

1. Who am I?
2. What has shaped who I am?
3. What don't I want people to know about me?
4. What aspects of my identity are being suppressed as a result?
5. What are the beliefs and assumptions which determine my behaviour?
6. What are the habits that served me well in the past but are no longer fit for purpose?



Figure 4. Self Inquiry Questions – Identity

Self Inquiry Questions - Presence



1. What assumptions am I holding about how I need to show up in this situation?
2. How does my intent to impact a particular situation get spelt out to my clients?
3. How tightly am I holding onto my intent and how is that affecting my presence?
4. How often do my assumptions get in the way of giving power to others?
5. What do I need to let go of control and allow myself to be vulnerable?
6. What might I be reinforcing in others with my actions?

Figure 5. Self Inquiry Questions – Presence

and assumptions. Figure 5 lists some of the questions that I used to surface my own assumptions.

My experience has emphasised that my ability to bring the presence that is otherwise missing from the client system is directly contingent upon my ability to be present in the moment. So, before you go into your next meeting:

- » Be aware that your intent might detract from your conscious presence
- » Be alert to when a different mode of presence is needed
- » Be conscious of how your interventions might constrain others and collude in keeping them stuck

3. Grow & evolve; work to remove the filters between purpose and reality and pay attention to what wants to emerge in you

In my third inquiry, I had arranged to meet the MD of a mid-enterprise business to explore what was going on for him and his leadership team. As the meeting progressed it transpired into a deeper coaching conversation about the MD's own credibility as a leader. I had subconsciously sensed an opportunity to go deeper and as the conversation became more personal, I noted the MD's attempts to deflect the conversation from himself. I also noticed that the conversation was becoming uncomfortable

for us both. At one point in the meeting the MD literally recoiled from the conversation pushing his chair back from the table and sat for several minutes in silence. It was at this point that my sense of purpose ignited with a compulsion to go deeper, but for reasons that were unclear to me at the time, I was propelled into expert mode as I heard myself offering the MD a way out of his discomfort, or mine.

Hawkins and Smith (2006), denote that a key quality of the OD Practitioner is *"having the ability to intervene to alter the emotional culture of a meeting in a way that changes or reframes the way that issues under discussion are perceived and addressed."* Through self-inquiry, I realised that I had retreated into expert mode before making the MD aware of his desire to deflect attention from himself. I had not yet established a relationship of trust with this client and

I felt safe retreating to expert mode. As a result, I resisted the desire to work with my intuition and take the conversation even deeper. This experience brought to life 3 key learnings;

1. That any conflict in ourselves needs to be resolved if we are to work authentically
2. That we truly cannot go deeper with others until we have done deep inner work on ourselves
3. That a deeper relationship of trust needs to be established before we can do deep work with clients

What also transpired from this inquiry was a clear disconnect between my purpose and my actions. Simon Sinek (2017) encourages us to find our compelling why, that place from which our inherent purpose originates and *"feeds the source of our*

To rediscover my purpose, I needed to re-examine the extent to which clients' expectations for quick results makes it easier to become stuck in a mode of safe and conventional practice. Ultimately, there is only one question; what am I here to do? If I am not disrupting the consciousness of leaders at some level and helping them to make better decisions, then what is my true purpose?

Self Inquiry Questions – Purpose & Meaning



1. Where are the gaps between my intent for my practice and my current reality?
2. Am I working intuitively with what is needed in the moment?
3. Am I living on purpose and in accordance with my values?
4. How might I be allowing others' expectations to derail my purpose and values?
5. How am I invoking the consciousness of my clients?
6. What is it that tips me back into expert mode?
7. What might I be suppressing as a result?

Figure 6. Self Inquiry Questions – Purpose & Meaning

passion and inspiration.” To rediscover my purpose, I needed to re-examine the extent to which clients’ expectations for quick results makes it easier to become stuck in a mode of safe and conventional practice. Ultimately, there is only one question; what am I here to do? If I am not disrupting the consciousness of leaders at some level and helping them to make better decisions, then what is my true purpose?

If any of this resonates, Figure 6 lists a few questions which might help to uncover any tensions in your practice and reconnect you to your true purpose.

So, my top tips from this inquiry are that whenever you are feeling conflicted:

- » Ask yourself, “what am I here to do”, to find the source of your energy and passion
- » Work to identify and align any disparities between your purpose, intent and your reality
- » Trust the voice of your intuition, pay attention to what it evokes in you, and let it be the place from which your expertise flows

Otto Scharmer (2016) suggests that “the universe has its way of suggesting to you what to do. Then you listen to it deeply and pay

attention to what is emerging from your inner sources of knowing.” My experience has been that the universe’s way of suggesting what to do manifests as a persistent sense of being out of alignment with my core purpose. I am responding to that by letting go of the kind of leader that I think I need to be and leading in a way that feels intuitively integral to who I am. My research has also taught me that even when we are at the top of our game, we are not immune to making rookie mistakes. The trick is to constantly bring a conscious awareness to the effect that we are having on others through self-inquiry.

It seems highly appropriate to bring together what I have learnt from self-inquiry with a relevant quote from Jamieson et al. (2010):

“We may become victims of our own behaviour, routines or blind spots, and under optimise what we ultimately do. So, part of the journey is a discovery of our different parts and selves. By identifying, accepting and re-integrating parts of who we are, we bring awareness and voice to those various selves, which allows us to not only understand them, but also to choose more fully when they arise and how we want to use them.”

Conclusions

My journey into self-inquiry has been an overwhelmingly disquieting and visceral experience which has been felt on many levels. Through its generative quality, by which I mean the way that each thread of discovery sprouts voracious new shoots of further inquiry; through its destabilising quality, as the data reveals itself with an unequivocal discomfiture that cannot be negated. I started this article by sharing some of the powerful triggers for my own journey into self-inquiry as a means of turning the beam of curiosity back onto my practice, to see how I might be keeping organisations stuck in a mode of institutional failure and dysfunctional leadership. I have shared my own experiences of doing self-inquiry, and the critical lessons learnt about my own leadership repertory.

What effect has self-inquiry had on my practice?

Doing self-inquiry means that you need to be prepared to change what no longer serves your practice well. Critically, by developing a healthier association with my own latent beliefs and unexplored personas, I have become more effective at bringing awareness to potentially unresolved

issues in others. By working to remove filters which get in the way of my effectiveness as a leader, self-inquiry has also enabled me to be more open, creating a greater a sense of empathy and connectedness with my clients. I discovered that my work had inadvertently become more entrenched in sophisticated process methodologies and perhaps less orientated towards solutions and results. As a result of my research, my map of OD now positions ‘use of self’ at its core, alongside my purpose and values. I have also been able to gain greater clarity about my purpose as a leader and renegotiate my relationships with existing clients. I am therefore an avid

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advocate of self-inquiry and believe that it can help us as OD Practitioners to have a greater impact on leaders, engineer our own reinvention and better equip us to navigate the world of disruption that we live in.

Is Self-Inquiry for You?

Self-inquiry can be profoundly difficult and comes with several health warnings. It requires the researcher to be teachable. It also requires boundless resilience to confront our deepest fears and come out the other side relatively unscathed. As a method of doing research which is believed to have no distinct paradigm, it has at times felt like hurtling towards a cliff edge on an out of control roller coaster. Nothing that I read in the literature prepared me for the levels of deeply disruptive and correspondingly unshackling moments that I experienced. I have distilled below some critical insights and key considerations before embarking on self-inquiry.

1. Approach self-inquiry with great self-care, kindness and compassion, particularly if doing this kind of deep work on yourself is completely uncharted territory.
2. Start with a deep and unbounded curiosity into what enables and obstructs your best work and be ready to confront any illusions about your practice.
3. Be prepared to set aside any pre-conceptions of doing research, be open to what the data reveals, and get comfortable with ‘not knowing’.
4. At times, being both the observed and observer in self-inquiry is like rewinding a film reel, replaying it in slow motion, and seeing the bits that were edited out the first time around. You will need to patiently rewind your story until your reality becomes clearer.
5. By its very nature, doing self-inquiry is fundamentally an introspective process which can be both unsettling and disconfirming. Be prepared to work with a sense of sands shifting beneath your feet as you progress through your inquiries. Be ready to draw on your support network.
6. Be aware of the boundaries between self-indulgence and deep self-awareness. Aim to use at least two methods of inquiry to reduce the risk of subjectivity in your data. Self-reflection on its own is insufficient.
7. Be aware of any desire to protect your ego, to censor the parts of your story that you perceive as less favourable. Counter this by bringing any inclination to censor your findings out into the open, to heighten awareness of them as you proceed with your inquiry.
8. Self-inquiry is not something that can be done in isolation or done once never to be revisited; the depth of knowledge sought needs to be acquired dynamically, through continuous critical self-reflection, actively seeking feedback from those with whom you work, and by co-inquiring with others to widen the beam on your performance.

Final Reflections

As the business world grapples for answers to some of the most complex and disruptive problems of our times, they look to the helping professions to step up and make a difference. I am left with an unassailable conviction that if we are to do the kind of deep OD work with clients that is needed in an era where disruption is becoming the norm, it should be a prerequisite for anyone who calls themselves an OD Practitioner to regularly undertake some level of deep self-inquiry to be given a licence to do deep inner work with others.

Martin Goldberg (2019), proposes that OD has two clear paths to follow; one in which OD Practitioners find themselves in a *“blind alley where we are tempted by the formulaic,”* and one in which there are still *“glimmerings of the strategic promise of the field.”* For me, that glimmering of strategic promise requires me to step beyond my superficially and safely constructed notions of ‘developing self-awareness’ to something that enables me to become more intimately connected to who I am, what I bring, and what gets in the way of doing great work in service of others. Something that requires me to foster a deeply profound curiosity about the effect I am having on the world and those within it. That something is self-inquiry.

As eminently quoted by Carl Jung:

“Your visions will become clear only when you can look into your own heart. Who looks outside, dreams; who looks inside, awakes.” So, are you awake, or are you just dreaming? How might you be contributing to the systemic failures of leaders in organisations?”

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A visionary and intuitive leader, Sharon has worked across the polarised spectrums of the start-up industry and the corporate world, as an internal executive leader, external consultant, and advisor to CEO’s and Boards. Sharon is passionate about helping leaders to tune into their own true source of power, extricate themselves from the kind of leader they think they need to be and move forward with a clear sense of purpose. In doing that, Sharon aspires to change the way that we think about leadership in organisations and help to cultivate a greater sense of the potential and possibility for a new era of conscious leadership. She can be reached at: sharon@nashconsultingpractice.com; www.nashconsultingpractice.com.

From Citizen to Change Activist— Through the Concept of Use of Self

By Tong Yee

Abstract:

A significant and personal journey of a leader in changing systems and society. He outlines critical issues with our systems, what they create in the people that work in them and how a scarcity mindset and living in “debt” drive patterns of dysfunctional behavior. This article further tells the use of self story of the leader who made significant self-changes to become most effective in the types of change he was pursuing.

“Demanding provision from a system that is itself made up of depleted individuals is likely a futile and hope-depleting endeavour. Wisdom would have it that we respond with not more demands, but more self-care; to replenish our own personal systems such that we do not incur more debt on behalf of the system.”

My Journey as a Social Entrepreneur

Many of us – whether we call ourselves social activists or social entrepreneurs – often start our journey from a position of anger and discontentment with the society we live in. We are deeply bothered by witnessing the many social issues that dehumanise people – whether it be domestic violence, lack of mental health care and support, lack of inclusion for disability, racial prejudice, gender inequality, etc. These “dysfunctional systems and patterns” often originate from a psyche of scarcity, insecurity and a consequent desperation for survival – “I need to look out for

myself” or “there is not enough to share.” We begin to see that psyches of scarcity breed cultures and mentalities of scarcity. Because of the interconnected nature of systems, the shared social and environmental issues we face as a society reinforce the same core psychological state – “never is there enough” and “I am not enough.”

In a highly compressed society, instead of making time to connect people and build community, people often revert back to the more comfortable legitimacy of lack of time, patience, energy, or money. And when we felt there wasn’t enough, we fought even harder to survive. As a citizen of the Singaporean State I have been critical of this scarcity mentality because growing up in this environment is to witness the premium value the nation put towards achievement and success – which has an unintended consequence of making both systems and individual citizens feel like we never have enough achievement nor success.

I wondered whether this was unique to Singapore. A tiny state in size, a highly tumultuous independence story and the reality of having no natural resources, did indeed imbue in us a psychological desperation to survive; and from it a constant sense that we lacked something or there was not enough for each of us. There is something about what we are witnessing in the world today that communicates the same root mindset and behaviour: there is simply not enough for everyone, and therein a solo stance becomes the default mode of operating.

Shortly after 9/11, I encountered a description from a journalist who poignantly described the United States at that point, that “our pain would naturally breed self-absorption”. When our needs are unmet, our projection on others can become rife.

What drove my social entrepreneur engine was an increasing level of witnessing that the systems we live in are not working in the favour of citizens and people. It unintentionally caused both dysfunctionality and disarray. The community I am in, knows that ignoring dissatisfaction does not seem to be an option that we can accept. In fact the scale of anger within us has brought urgency, tempo and attention to all the issues that seem to be raised. Many of these old issues may have received some attention in the past, but not at the volume, speed and coherence that are needed. As a social entrepreneur, I realized that I have to wade into this complexity and arouse movement that will support the system to shift. And I would admit that my first 10 years of work, although perceived to be successful, were a delusion that complexity quickly exposed and tore apart.

The reason my earlier work led to that is because during those early years, I was expecting someone else to suddenly step up and fix the systems that I was hurt by. I was too angry to facilitate the transformation and I knew I could not focus on the effort to bring about the change that I wanted to see without paying attention to my own resistance to change. I operated from scarcity – I had become the system that I wanted to deconstruct. By destroying the system I was a part of, I would destroy myself.

How could I be fortunate enough to overcome resignation, indifference and cynicism when so many did not? And if all systems are essentially imperfect, then how are systems designed to manage and work with the inevitable anger and frustration that will emerge from them? Growing our own organisations, a social alternative to our current reality, revealed so much of this truth.

What I Have Done . . . Reflection and Lessons Learnt

In 2002, I had founded a small social enterprise in Singapore focused on the emotional and financial support of students who did not perform well in a highly competitive Singaporean education system. The success we attained was a surprise and perhaps had come too easy. Although we were successful, the work was unfortunately personality driven and the success was highly contextual to Singapore.

Underneath our success, were several unspoken phenomena happening for me personally. Over the years, I had grown resentful of my work and had built an almost victim mentality that had me feel obligated to stay in the work even though I was supposed to love it. I had begun developing increased fantasies of myself escaping the work and responsibilities, being reckless with the reputation we had painstakingly built, and relieving myself of whatever shackles I perceived held me. I was also eating and sleeping poorly, gaining weight and getting increasingly introverted with a dislike for community or human contact. And the systems I led were picking up my resistances, and inevitably I was shaping the way the organisation grew and the habits they learned from me.

Our team began working much later than usual hours, we spent unproductive hours resisting one another instead of getting work done, and most of all, many members in my team began feeling that they needed to rescue me. This contributed to all sorts of unhealthy relationships. It was only when I began my journey in OD, and the inevitable learning about Use of Self did I truly start to pay attention to what was happening in my person, and how that profoundly impacted the quality of my organisation.

This reflection showed me that emotional debt can be cleared by no one other than ourselves. And until we did that work, we cannot journey with others to reach that same desired destination. Committing to and learning how to do intrapersonal work is a vital function of any system's health.

Without it, no system can hope to meet the granularity of the issues that appear for the diversity of the world's people.

Shifting Focus – From Effective System to Self Work

The turning point for me was when we began to search for methods to scale in what we were doing, a search that led us to learn about processes and systems, a path that eventually brought us into the field of OD. This move began a journey that has been humbling and transformative. But most of all, it began a reflective practice to begin looking at how my own way of being was affecting my larger system, and how my own poor emotional health was contributing to the lack of sustainability in my organisation. I emerged from this struggle with the realization that **“Self work is the building block of an effective system”** at least for a social entrepreneur.

In 2015, I attended the NTL OD certificate programme in Europe which opened my eyes about how interlinked system work is critically linked to group work, to self work, back to system work. The concept of Use of Self is particularly revealing to me about why past social actions were deeply dissatisfying.

In 2019, I went to UK to attend the Use of Self workshop in Roffey Park Business school when we learnt of the research and work on Use of Self by Mee Yan Cheung-Judge. And it was in those few days working with over 30 experienced OD practitioners that everything began to come together for me. She had identified nine clusters of development that emerged from most of the literature that had been written on Use of Self (see *Figure 1*). It was over the course of the year that I studied and read more about what her research had found, and for myself, how this all made sense in the experience of what we were going through in Singapore. The result was a rearrangement and alternative presentation of her initial core research but in a way that we, as social activists and innovators in Singapore, could make sense of.

USE OF SELF WHY WE NEED IT | THE 9 DEVELOPMENTAL CLUSTERS

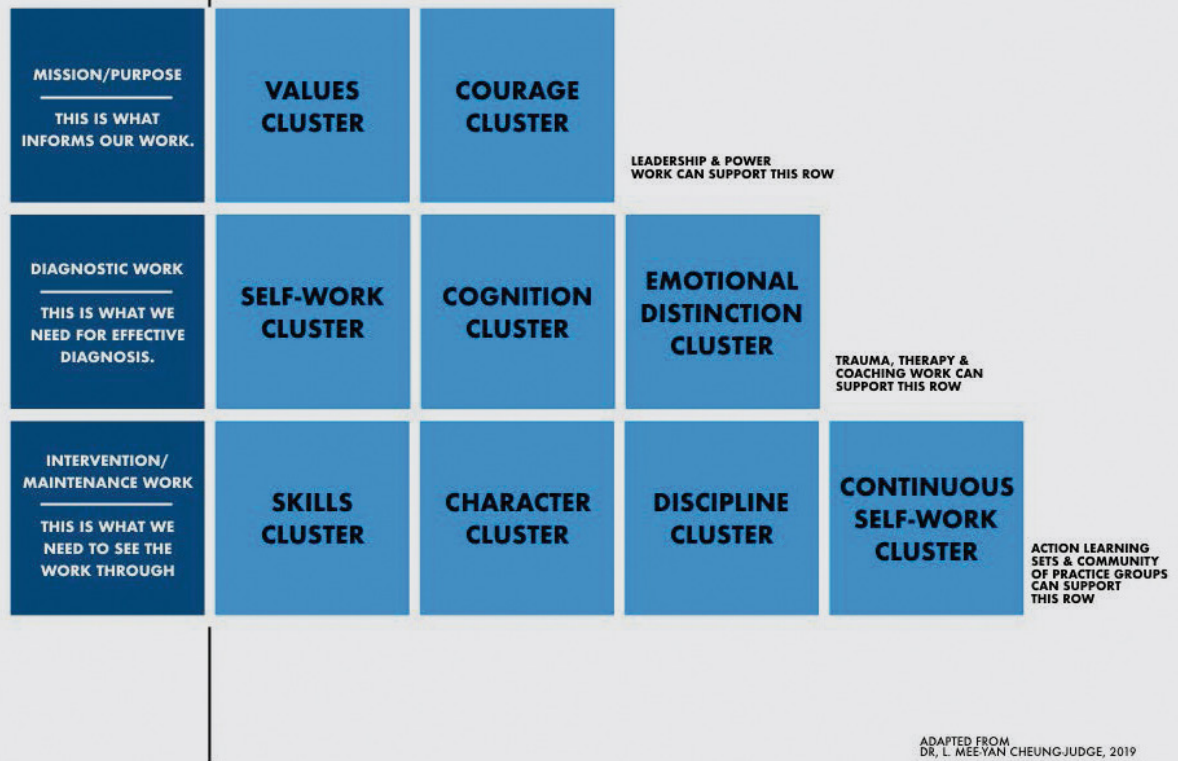


Figure 1. Use of Self: The 9 Developmental Clusters

How Use of Self helped me to navigate from anger at imperfect systems to energy to build sustainable alternative systems.

When I reflected back, my own journey as a social entrepreneur began with my personal experience of injustice and anger at the system I was a part of. Not doing well in school, I felt left behind by systems that were supposed to take care of me and my learning. I questioned why people were not given a second chance and I railed against all systems. My anger, however, was quiet and seething. I was a victim of the system and felt powerless to intervene.

Since the NTL OD certificate days, I found I am slowly maturing in my understanding that it was not the system that had brought my debilitating exclusion, but rather cultural expectation and a lot of personal guilt that I had brought upon myself. I shifted my focus to self work and healing and was able to grow into being an agent of awareness and change that actually did something. I began volunteering and mentoring others. As my skills grew parallel to

my healthier identity and sense of purpose, my anger was slowly being channeled into an ambition to create sustainable interventions to address the gaps in my system.

It became apparent to our part of the world that Use of Self was more practised than we had imagined. It was not some esoteric and alien concept that demanded 15 years in isolation on a mountain; but rather something that is observable in any individual that effectively brings change in systems. We began to see that Use of Self involved three distinct bodies of work:

- why we do our work,
- how do we describe and diagnose the work before us, and
- how we execute and sustain it.

In our own social sector, I began to study the few people who truly brought impactful and sustained change, and it suddenly all came together; they used themselves with intentionality, integrity, skill and resilience. They embodied abundance and, in many ways, were impervious to the debt that

large systems have imposed on us. They notice their own human lack and scarcity, but intentionally moved and used themselves in a way that handled it, and not propagate it further.

My interest in finding those who use themselves effectively propelled me to listen to the narratives of each person, whatever the seniority or designation, and I wanted to observe them to see how they used themselves. And more importantly, whether they showed up as people who are aware of their interior and their source of abundance from which they operate. Or whether they are embedded into systems of debt, and contexts where their systems owed them.

I discovered, whenever there is a lack of focus on self, there will be a manifestation of low quality in their interpersonal relationships, the lack of thoughtful approaches to handle corporate mandate, or their preference to impose their view on others. When their emotional systems communicate rising debt, vs rising passion, then we know that will only lead to more

entrenched unhealthy cultures. On the other hand, it is the leaders or practitioners that embody otherwise that seem to create discernible and sustained results.

Demanding provision from a system that is itself made up of depleted individuals is likely a futile and hope-depleting endeavour. Wisdom would have it that we respond with not more demands, but more self-care; to replenish our own personal systems such that we do not incur more debt on behalf of the system. And this I must say is surely an act of love; for after over 20 years of meeting the needs of people in all levels of systems, I can tell you that this is a courageous and selfless act that is rare, and made even more difficult when our systems do not reciprocate.

Wisdom and courage inspire self work. Discipline sustains it.

But the one thing that is in common, is that the leaders and individuals that have hope of navigating and healing systems, have an undoubtedly stable stance; they take care of themselves so that they can take care of others. It is only when we do that, that we can be increasingly assured that our interventions remain clean. Use of Self when not coupled with self-care can become a hazardous projection of our own baggage, except with even more sophisticated tools.

Practical Suggestions

Practically, there are 3 domains of debt that we can incur and therein, 3 main domains that we need to pay special attention to in order to remain as abundant and serving interveners. The first is most apparently, somatic debt. Sleep, diet, exercise and ritual cannot be understated as critical components of keeping our physical bodies healthy and able to give. It is a near certainty that lack of sleep, deprivation of food, and languishing energy create a felt scarcity that impacts a clean Use of Self in any situation.

The second is to manage our emotional debt. It must be said that the easiest way to deal with emotion is to adopt indifference, apathy and cynicism as

temporary coping mechanisms. They are legitimate ways to deal with emotional pain and are starkly well-used mechanisms in large systems especially when there is a strong need to survive or compete. These are low-hanging fruit for individuals but when they become permanent, can very quickly bring barrenness to a system. Apathy, indifference and cynicism do not restore our reserves, they merely stem emotional spending.

Emotional moods take away much of our adaptability as humans. They are at play when we no longer experience wide responsive emotions, but predictable patterns of emotion whenever a similar situation arises. This lack of range demands that we pay attention to possible past trauma that affects and arguably even predicates how we see. They are also alleviated by declarative and habitual choices to forgive, trust and accept. This supports the reduction of strong moods of anger, fear and sadness respectively.

The third, and perhaps the most impactful, is to give attention to our linguistic experience and how we describe and assess the world we reside in. Our descriptors of relationships, work, money or literally everything shapes our experience and indeed how much perceived debt we are in. Optimism or a belief in pronopia, are powerful linguistic interventions into our own psyche and sense of provision. Actively offering, requesting and declaring also can dramatically change our experience of abundance in the world.

Do not understate these things. Indeed, our body, emotion and language form the very temple from which our work and contribution reside. An effective Use of Self demands that we accept the fundamental responsibility to take care of self. No larger system can do this indefinitely for us, and although it is a privilege to be part of a system that has our interests and care at heart, it is not an entitlement for any one human. Accepting that responsibility is what I believe to be the single most courageous and loving act that we as practitioners can adopt to ensure more abundant systems in our shared future.-

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Mindfulness and Use of Self Better Together

By Bena Long

Introduction

Confused about the differences in Use of Self and Mindfulness? This article gives a background into both concepts, along with definitions, and how they practically support each other for the benefit of Organizational Development (OD) initiatives and Organizational Development practitioners (ODP).

Use of Self (UoS) is essential in the roles and responsibilities for Organizational Development Professionals and helping professions as our presence and influence in circumstances of change impact and affect many people. Our skill at paying attention with expanded awareness from a healthy psychological distance gives us a greater opportunity to effectively manage ourselves for the highest net value of all involved. Our ability to be self-knowledgeable about our biases and to free ourselves from them as much as possible, to interpret and act from as great a place of equanimity as possible is foundational to the concept of OD practice. When it comes to our work, we must wade through the anxiety, confusion and emotions present to interpret and take action with calm clarity for the benefit of advancing the client’s work. This ability to direct, decide and act resides within our self. All of our education and theories, assessment tools, and information are ultimately only as effective as our ability to self-manage, to be so familiar with and effectively use the instrument of self. This self consists of the structures of our internal landscape, qualities, values, characteristics, habit patterns,

personality and more. Our ability to navigate this self and utilize what we have is greatly benefited by skill of attention and awareness that long term Mindfulness can provide. The purposeful use of attention and awareness over the long term can aid in the development of interpersonal, social, emotional, and leadership skill. Ultimately providing access to the self and direct experience of the instrument within for greater effectiveness in the work we do, the lives we live and influence on others.

Background on Mindfulness

In the literature, mindfulness is referred to in two prominent and frequent ways 1) the use of attention and awareness to experience a quality-of-mind, or state-of-being; and 2) forms of practice that enables one to cultivate the quality and state (Hülsheger, Alberts, Feinholdt & Lang, 2013; Kabat-Zinn, 2013; Purser & Milillo, 2015). While the former, a state of being mindful is available to anyone at any time, tapping into the experience is often haphazard or unpredictable. To experience this state with greater regularity and reliability, most people need to perform some mindfulness practice for further cultivation (Kabat-Zinn, 2013; Weick & Putnam, 2006).

Its purposeful cultivation has taken many paths for thousands of years. Mindfulness is most often regarded as originating from Buddhism (500 B.C.E.), but its roots go back even farther to the traditions of the Indian subcontinent (Cousins, 1996). Many practices used today include or have emerged to cultivate and enhance

the state of being mindful and have their origins in these ancient traditions. There are three overarching categories of traditions that offer practices to cultivate mindfulness and traditions that mindfulness is an outcome of practice, even though it is not the intended goal. These consist of Western mindfulness, Secular mindfulness, and Eastern mindfulness (Lykins & Baer, 2009).

Individuals can be utilizing Western, secular, and/or Eastern forms of mindfulness. Each has its own history, methods, meaning, and purposes. A practitioner of Western mindfulness may have begun practice as an organizational intervention and personally have goals for things such as improved task functioning (Weick & Sutcliffe, 2006). Another may have come to secular mindfulness by attending a seminar in stress management. The practitioner may be in search of mental peace, improved concentration, and/or greater emotional discipline (Kabat-Zinn, 2013). Eastern mindfulness may include all the previous goals and add a dimension for those seeking the spiritual or even enlightenment and beyond (Lykins & Baer, 2009). The search for mindfulness may be through Christian forms of contemplation and prayer, Buddhist meditation, or the mystical side of religious traditions such as Christian, Jewish, Muslim, or Hindu faiths. Practitioners may have spiritual goals of experiencing the sacred nature of the universe, and/or a deepening of empathy and compassion and/or the hope to end suffering for themselves and others (Shapiro, 2009; Goleman, 1988). The theories surrounding each of these paths to practicing mindfulness is unique even if practitioners may share one similar intended or unintended outcome of being mindful. Mindfulness is so widespread across religions and programs because it is about the use of attention and awareness that gets to the core of providing access to and a way in developing awareness of self for the betterment of the use of our self.

Every human has the potential to be mindful irrespective of any particular training in mindfulness or meditation. But to develop the skill takes practice. There are many ways to cultivate attention

purposefully for experiencing the state of being mindful. While there are many ways, the most important will be the way each ODP chooses that instills a consistent engagement with the practice.

Background on Use of Self

UoS shares a historical similarity to mindfulness in that it has origins in experience and practice (Jamieson, 2017; Cheung-Judge, M., & Jamieson, D.W., 2018). As the experience of mindfulness is thousands of years old (Kabat-Zinn, J., 2003). It is just now taking hold as a valued concept within the workplace (Good, D.J., et al., 2016; Hülshager, U., et al., 2013; Weick, K. E., & Putnam, T., 2006). Compared to Mindfulness, UoS is newer on the scene as it spans most directly within OD from the 1940s into today. While it is growing in the recognition of its value as a central competency for OD practitioners (Jamieson, 2017), we need not wait so long for ODP to bring the practice of UoS into conceptual knowledge.

The most current and insightful treatment of the background on UoS can be found in the “Global Use of Self Research Report” by Mee Yan Cheung-Judge and David W. Jamieson (2018, 2020). This takes a comprehensive look at both the background and definition. Of note with regard to it’s background is the role of Gestalt Psychology and Psychotherapy in moving people through the cycle of experience and further documented by Cheung-Judge (2019), in establishing the “central tenants behind the formulation of the UoS concept;” where “pulling ourselves together as an instrument to serve others (p.9)” is the basis of needing this concept as ODP.

Definition of Use of Self

Being dynamically human, UoS is a complex concept that as ODPs endeavor to achieve positive impact on “the current situation through providing service, helping change, and assisting others”(Cheung-Judge, M.Y. & Jamieson, D.W., p. 2018); a definition that incapsulates the completeness of UoS can most succinctly stated be “the conscious use of one’s whole being in the intentional execution of one’s role for

effectiveness in whatever the current situation is presenting” (Jamieson, et. al., 2010, p 9). Where it’s practice endeavors to know ourselves deeply enough so that we can most fully utilize who we are and our capabilities to their fullest in service of others.

Relationship of Use-of-Self with Mindfulness

When using practices to focus attention and expand awareness, there is a shift in perspective that Mindfulness creates. The subject of the mind becomes the object of your observation – witnessing awareness (Kegan, 1982). For example, when the breath is attended to at the point where the nostrils meet the upper lip, there is a shift from being in one’s thought or mental chatter to sensation of the coolness and warmth of the flow of the breath (Long, 2013). At first, this takes all attention on the breath to the exclusion of all else and then with practice, there is a recognition of observation that differentiates you from the breath, the thought, etc. Moving attention from thought constructs to perceptual awareness with, in this case, breath practice enables the witnessing of sensations and thoughts and behaviors with a loosening of identifying with them (Long, 2019). Teasdale and Chaskalson (2011) suggested the mechanisms of mindfulness practice such as breath awareness reduce reactivity by creating psychological distance.

This psychological distancing is an outcome of observing the flow of the mind and its contents. Its benefits for practitioners of long-term Mindfulness demonstrated a greater capacity to self-manage and filter their emotions and thoughts before acting on them (Lykins & Baer, 2009). The very act of observing the mind and its contents directly and systematically increases awareness but also the act of observing. This observing of mind is not a thinking process, but instead is being a witness to the thinking process. This loosens the grip of identification and patterned behavior to allow for deeper personal experience as an observer of thoughts, emotions, and sensations which may develop into a more neutral witnessing awareness (Long, 2019; Reb, Sim, Chintakananda, &

Bhave, 2015). Mindfulness meditation is a means to long-term development of the UoS, where self is more available as an instrument that can direct one's actions consciously (Weick & Putnam, 2006). From Austin and Bartunek (2003) it is suggested that in order to respond to changing conditions, one must develop new understandings in the moment. This in-the-moment knowing, and understanding is akin to developing the ability to reflect while acting or said another way, reflection-in-action. To do so, one needs an awareness that transcends one's own preferences enabling more holistic insights into patterns for effective action.

A developed Use-of-Self, that includes the ability to maintain greater equanimity internally as a witness to one's self and environment, enables greater access to attributes of the Self most advantageous for working and serving in the role of Organizational Development professional. The access to UoS is aided when there is witnessing awareness and that awareness is sustained while in action going about work. Said another way, we aid in the development of Self when 'doing' is accompanied by 'being'. Where 'being' is the experience of the state of Mindfulness in service to the moment, the clients needs, and your highest purpose

As presented by Lyddy and Good (2017), in-the-moment awareness provides one the space to respond situationally with less need to act for personal motives. They call this in-the-moment while engaged in action "being while doing" (p.2). Consider going about your workday in action "doing" while in observation of yourself from a state of "being." This personal shift in perspective goes by many names: "witnessing awareness, re-perceiving awareness, de-centering, and de-automatization" (Shapiro et al., 2006; Brown & Ryan, 2003). Experiencing such states of mindfulness can be beneficial for Organizational Development Professionals in the development of Use-of-Self.

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With the aid of being mindful, the insights into UoS determines the reactions

This can even develop into a type of reflection-in-action, or reflecting in the moment while engaged in work (Lyddy & Good, 2017; Long, 2019).

Practitioners of long-term mindfulness can use mindfulness as a means to develop Use-of-Self. In doing practices over time, they become better listeners, handle difficult conversations, stay present, and maintain clarity in conflict-ridden meetings, hearing all the voices and stakeholders affected by their decisions (Long, 2019). Improvements from long-term mindfulness include recognizing the situational reality from which to take action, as well as self-regulation and self-observation, which improve clarity and objectivity (Shapiro, Carlson, Astin, & Freedman, 2006; Tsui & Ashford, 1994). Mindfulness is a potential source of practices that develop the individual's capacity for the best action to benefit the individual, team, and organizations for which they are serving.

Steps to Access Greater Mastery of UoS with Mindfulness

Since most OD work is done within the moment sensing, mindfulness is uniquely positioned to aid us. If you are new to the practice of mindfulness, the simplest way to start is to informally pay attention, that is attention that is not on your thoughts, rather on sensations. The most common and always available point of focus is the breath. It is always with you and you can practice in nearly all circumstances with little outside awareness from others. There are 5 recommendations on implementing Mindfulness practices: 1) Practice, 2) Patience, 3) Persistence, 4) Safe Experiments, and 5) Have Fun.

1) Practice – Mindfulness with curiosity and inspiration. Begin a practice of mindfulness that suits you. There are many forms of ways that build attention and awareness in the moment. Mindfulness is not an emergency method. Its value is in the systematic long-term practice that helps you to access more and more of UoS which occurs as attention through concentration. This ability strengthens, expands awareness, and deepens enabling you to be in the

moment and access your UoS with greater ease and facility.

2) Patience – patience with oneself, as this has both immediate results and long-term benefits, for developing skill with consistency. We have different and unique interests and abilities. The best practice is one you enjoy doing and can implement on a daily basis.

3) Persistence – the need to recognize and reconcile when a particular Mindfulness method does not seem to be working, it is necessary to tweak the approach, so you are inspired to continue with it or resolved/encouraged to try another technique. There are many ways to developing attention and awareness and it can start with either the mind or body. In some cases, this is recognized through stress management such as, Hatha yoga or Tai Chi, while others prefer seated practices. The best practice is the one that you can maintain and be consistent with.

4) Safe Experiments – This is the application of mindfulness into UoS. Get curious. How does focus on the sensation of breath, a process of perceptual awareness training, impact what you hear when someone is talking to you? What does it do to the experience of walking into a large-scale change with a full room of people? What data does it reveal about the coaching client sitting next to you? When mindfulness is new, do not use it in critical situations like a client meeting. It is always best to experiment in non-critical situations. So, practice on your friends and family!

5) Have Fun – making a difference by showing up, as you are, with awareness and intentions of making the best Use of your Self. You are one of a kind and your presence is needed wherever you are; because wherever you go, that is where you are!

Conclusion

UoS is proving to be an essential competency of OD practitioners. In the quest for levels of mastery over Self, mindfulness is a beneficial companion. It is a “root

construct” for creating a positive impact on values, thoughts, feelings, human functioning, and it does so in all social domains inclusive of workplace outcomes and organizational settings (Good et al., 2016). The expansion of awareness created by mindfulness has the potential to increase clarity and objectivity in the present moment by creating a healthy psychological distancing that gives in-the-moment capacity (Shapiro, Carlson, Astin, & Freedman, 2006). This capacity is like a pause without pausing, a space-in-between that some long-term Mindfulness practitioners call “being while doing.” This experience can bring out more than you ever realized about yourself and the ability to be present in the many dimensions that need attention to perform the best work.

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“... the marginal ‘outsider’ position occupied by OD practitioners provides a potential challenge to business as usual. However, to be active and useful in providing that challenge requires practitioners to educate themselves radically ...”

Radical Times, Radical Selves, Radical Learning

Facilitating the Self to Own Learning and Build Stronger Practice

By Tom Kenward

Introduction

As I encounter the present world of work, I think OD practitioners and OD educators have an opportunity to play a more influential role. Both are well placed to inspire and equip people to make a powerful difference.

While more progressive, participatory, educational practices may be reaching some UK universities (albeit six decades after the open classroom movement and centuries after other wisdom traditions), I see this being demanded by a hyperconnected generation of learners, rather than volunteered by enlightened academics. Truly participatory educational options for OD practitioners and theory development exist, but options are perhaps shrinking, in the UK at least (Tosey and Marshall, 2017). I describe here examples of experience as a participant and as an educator in one such approach, to illustrate what these methods can achieve for OD practitioners and the Use of Self – UoS – (Cheung-Judge & Jamieson, 2018) in particular. While examples are partly of academic nature, the outcomes are practical and the principles apply beyond academic learning.

Radical times require radical selves

Now more than ever, a more radical stance to OD work seems useful in our rapidly changing, unstable world of work (Cheung-Judge, 2017). Biodiversity collapse and pollution, climate change, changing politics, erosion of privacy and free will, automation of work and global failures of capitalism

are some of the issues that organisations struggle to navigate today. In these pressures, the deeper good intent so often present in an OD project is susceptible to being lost. While practitioners must work with presenting context, I think there is scope for more radical work. I do not see it as OD’s place to preach a view of the world or to expect clients to share similar values, but the marginal ‘outsider’ position occupied by OD practitioners provides a potential challenge to business as usual. However, to be active and useful in providing that challenge requires practitioners to educate themselves radically, I suggest. Particularly in relation to developing how we use our primary instrument – ourselves. Thanks to the recent review of material from many fields on UoS (Cheung-Judge & Jamieson, 2018), there is now a foundation to its concept and practices. Aside from whether OD has a brand and positioning problem (Minahan, 2019), I believe OD educators are well placed to refresh OD practice, its education and to strengthen UoS.

How do participatory learning approaches deepen development in UoS?

My experiences as a student and facilitator in participatory education methods give me some insights into this question. I focus on three learning methods and look particularly at how I have seen these impact two aspects of instrumentality that link to the UoS clusters Cheung-Judge and Jamieson identify, namely agency and dialogue. The three methods, summarised in *Figure 1* are:

1. Supporting learner-defined outcome development
2. Facilitating collaborative learning design
3. Structuring self and peer assessment processes

I discuss each method in turn, exploring personal experiences and benefits (that I have also seen for other students), particularly as they relate to development of UoS. I will also connect benefits between the educating process and doing effective OD work as I believe there is much to gain for student, educator and OD practitioner in these methods.

1. Learner-defined learning outcomes

Some years ago, I undertook an MSc in People and OD. The learner defined their own learning goals then led the process of attaining them. After nine months of mainly self managed exploration, with an outline curriculum guiding inquiry, I had to choose what to commit my time and energy to for the remainder of the course. I found it a difficult task – there were many possibilities, and in choosing I would close off most. Through negotiation with myself and my peer learning group, I eventually realised that the topics I chose were less important than the learning process I was grasping – to learn how to learn. I've since applied these skills to other subjects I could not cover then. In taking responsibility for this process I also came to feel the tensions of these choices and the value in making my own clear judgements.

The experience helped me become more aware of my own decision making and, in the process, my agency to act. I realised how, in keeping options open for too long, for fear of missing opportunities, the opportunity to do good work might start to close. Building awareness of agency in myself and others is something I now see as a core capability in my practice. That experience has helped me spot fateful moments – where a piece of work (or learning) could be about to start losing the intent it began with, for the client and stakeholders' interests – and to act.



Figure 1. Learning Methods

In summary, as well as creating ownership, relevance and creativity in the learning process, setting one's own learning goals also identifies parallels between the learning process and personal strengths and weaknesses in OD work. If a curriculum had been fed to me, an opportunity to see my process of choice would have been missed. In any case, fixed curricula seem to struggle today to find relevance to workplaces and the world, let alone to connect with the diverse needs of the individual learner. This contributes to more leadership of self and in turn, more capable, confident and impactful practice – part of the core of UoS. To me this merits OD educators designing in more scope for the learner to identify and develop their own learning outcomes.

2. Collaborative learning design

Alongside developing one's own learning outcomes, perhaps an even more powerful way to take greater agency in the educating process is for the learner to actively curate the content and process of learning to achieve their goals. A LinkedIn post (<https://bit.ly/2kYJDbA>) of mine on this topic generated conversations that progressed my own views about the role of educators and learners in design and delivery. In summary: some challenged whether any educator can ever leave content

knowledge at the door and whether pretending to do so masks an inevitable educator-learner power differential; others asked whether attempting to do so may leave the learner unhelpfully confused and frustrated, or deprived of valuable perspective; others raised the issue of client value, questioning whether focusing mainly on a container and process for learning represented sufficient value. I still recognise great value in anyone who advances theory and practice sharing their insights, but I also see the role of curator migrating – from the educator toward the learner. But if the learner is to chart and curate more of their journey, learners might ask “how do I know what I don't know?”. In other words, how and to what degree can the learner guide themselves with a limited map? I offer one answer next.

My active involvement in such processes through my MSc was both valuable and uncomfortable. While I could still seek the help of ‘experts’ to help navigate the unknown unknowns, I and other participants mapped our collective knowledge together in the design process of the programme, iteratively developing a tailored route through a maze of options. This happened both at the level of designing residencies for the whole cohort throughout the programme, but also at the individual level of reading, writing and other inquiry with the help of a peer learning group.

Here I focus mainly on the former, being the part that is most distinct from common educational experiences.

During the programme, design conversations were held between residents with representatives of the cohort who identified learning outcomes for the next one and designed this together, drawing on their experiences, knowledge, networks and preferences. It wasn't always comfortable. I recall disagreements with peers and faculty about what we wanted to learn and how we would create an experience together that achieved that. I saw how these disagree-

system. However, the work is more as a process consultant than as a content expert (Schein, 1999), supporting the group to find and manage its own boundaries of expectations, authority and understanding, for example. Then the group can lead itself while making appropriate requests of a facilitator and faculty member with particular authorities and powers: what budget is available to spend; when does a decision have to be made by; what previous examples might help; how can this conflict be well navigated; and only relatively occasionally a request for content.

Another key skill in OD practice today (perhaps always), seems to me to be a capacity to improvise from the spot we find ourselves – to sense into context and respond accordingly. Through feeling the fear, excitement and fulfilment of playing an active part in designing my own learning, I shifted my assumptions not just about the authority of the educator but also about my ethics as a practitioner, developer and collaborator. Some key questions remain with me, that affect how I work with what arises in the moment.

ments were coloured both by my particular motivations for what I wanted, but also by how I saw and valued my own view alongside other people's views. I came to see that one's own assumptions both limit and permit the bounds of our capacity to hold true dialogue with others. I think these create similar dynamics for many people, in both the learning process and in OD work, as described by Reitz and Higgins (2019), and outlined below. And it was also inspiring. To discover that the collective knowledge and insight of a diverse range of practitioners was richer than any one or two faculty members could ever be, transformed my belief in collective wisdom and knowledge and the power of working participatively and democratically. Today a core value in my work is to support leaders to check their own assumptions about what they know and what they need to ask others. There is still a crucial role for a facilitator with expertise, just as there is for the OD practitioner and leader in a mature client

Through engaging in my own learning design process, I also came to relate to knowledge itself differently, challenging the authority of knowledge, whilst still respecting rigour of thought. Until I undertook the programme, I hadn't appreciated the degree to which much knowledge and knowing in developmental and behavioural sciences is a function of the knowledge holder's context. As such, the value of knowledge to others in other contexts requires particular scrutiny and examination. For example, as I sat listening to a professor talk about complexity theory, while I found it usefully challenging, the way it was presented meant that I could not make sense of much of the message in a way I was able to do anything with in my organisational leadership context at the time. However, by immediately having the opportunity to connect it to my own context through group conversations and comparisons, (because that is how we, not the professor, had determined we wanted to

run the next part of the session), I found deeper more practical learning in the challenge. Experiences like this led me to a different approach to supporting individuals and groups in their development. I realised that attempting to impart large quantities of knowledge from other places may be less useful, or useful less often, than I'd previously considered. More autonomous, emergent styles of facilitation (Heron, 2010), action research and learning link closely here, supporting the learner and practitioner to find their own meaning and motivations by connecting ideas to their practical situations. Beyond the educator role, the same principles have filtered through to my OD and leadership work. I have understood more fully how easy it is to create dependency patterns with clients, even when I mean to be helpful. For example, through offering a useful model or theory, a message the client may take is "you need another theory – you can't progress without something that you don't possess but I do". We may like to work with models we know well sometimes, but how can we do so in ways that still leave space for the knowledge and wisdom of the learner and client?

Another key skill in OD practice today (perhaps always), seems to me to be a capacity to improvise from the spot we find ourselves – to sense into context and respond accordingly. Through feeling the fear, excitement and fulfilment of playing an active part in designing my own learning, I shifted my assumptions not just about the authority of the educator but also about my ethics as a practitioner, developer and collaborator. Some key questions remain with me, that affect how I work with what arises in the moment. To what extent if at all should I shield participants from discomfort, even indignity, in working things out for themselves, if that process helps them learn important things about themselves? How long do I leave a conflict in a group discussion before intervening? Might I intervene too soon in order to stop my own discomfort, to alleviate my fear of being blamed, judged or attacked by the group, rather than in order to truly help the group learn? These experiences have led me to see OD work more as a negotiated, shared role than I used to.

The relative lab safety of one's own development process has proved a powerful space for many students I've worked with, in which to experiment with these sorts of negotiations and dialogues.

Bringing learners into the learning design process is also an opportunity to live the participatory, democratic values of OD work within the educating process and to give the learner a felt experience of the tensions and benefits of leading with these values, deepening many UoS capacities in the process. Power dynamics come into tension amongst these values as participants and facilitators confront different agendas, needs and styles. These experiences encourage participants to see how they behave when they engage with what they care about, that then helps them become more influential in other contexts. For example, considering the advocacy and inquiry axes of David Kantor's dialogue roles (Kantor, 2012), I still have to work hard to remain inquiring of another's position, particularly when I am convinced of my rightness and determined to get my way. In my work with others, I observe many people beyond me appearing to believe, perhaps unconsciously, that advocacy ultimately wins out. Yet, time and time again I see the 'winning' of a debate in a meeting rarely yielding any enduring commitment to action. Extending our awareness of ourselves in these situations is important if we are interested in either OD education or OD practice, I suggest.

The more day to day self-led learning process of study in the MSc described continues around and between the more formally negotiated and designed collective processes for residentials, with a similar and different set of dialogic processes to navigate as one interacts with a subset of the cohort every month to oversee study. This is explored in the next section.

In summary, involving learners in the design of the learning process, not just the definition of their goals, opens up a rich field of social processes, so relevant to doing OD work. The power dynamics and dialogue processes of negotiating different agendas to satisfactory ends for a diverse group of learners is equally applicable to the field of OD work as it is to the learning

process of a practitioner. So again, the parallels between participatory learning and effective OD work intertwine.

3. Facilitating self and peer assessment

A third way to deepen participation in the learning process is via the assessment of work and learning. This provides rich learning opportunities for everyone. The programme I undertook required me to assess my own work and receive feedback and assessment, from faculty but also from a subset of learners in my cohort. We had to reach our own judgements about our own and each others' work, then we had to give and receive those views in respectful, direct and supportive ways, in writing and verbally. This continued throughout the two years of study, meeting in the same peer group twenty times. I and other students have reported finding a truer voice and heard others' voices more fully in this process, particularly when views differ. It develops a deep appreciation of the subjectivity of one's own experience, and a greater respect for others' perspectives – essential to developing capacity for true dialogue (Reitz & Higgins, 2019).

The intensity of meeting like this pushed me to question previously unseen beliefs: what does it mean to support others to learn? What am I responsible for in another's learning process? How much is enough challenge? When should I continue to invite challenge for myself? What do I do with challenge when I can't take it? How forcefully can I disagree while still maintaining relationship? Having also held these processes as a facilitator, I see other students grapple with similar questions. Issues of power described in previous sections exist here too – how will things unfold when everyone knows that power over each others' fate – to pass or fail work – is held together. Will judgements be offered cleanly, even though much is at stake? I find similar tensions live in OD work.

In summary, while many training processes can develop strong dialogue skills, I have experienced the skills being learnt most deeply when embedded repetitively in a development process with high stakes,

such as that described here. I therefore encourage anyone in OD education work to look for creative ways to use self and peer assessment and feedback structures in the development process, in ways that iterate and deepen over time.

Implications for practice, at every step

Taken together, the three processes of learning outcome definition, collaborative learning design and self and peer assessment combine to develop core skills in the UoS. All three processes return iteratively to issues of awareness, influence, dialogue, inclusion, power and other dynamics at the heart of OD work. These educating approaches require a particular approach to design, delivery and more, raising complex questions about the nature of learning and the roles and responsibilities of learners and educators.

Firstly, an emergent programme with less predetermined content can appear to the buyer to be less packed with 'value', at first. However, if the experience and the benefits are illustrated, prospective students see the freedom and control this gives them and become excited, if they are ready to author their own learning. Regarding programme design, it cannot be fully predetermined, given the central role that each unique cohort of individuals play in shaping their programme. Therefore, design resource should be allocated throughout a programme and done in collaboration with the learner. Overall this tends to take more time (so costs need to be priced in). In my experience, participants see that the value returned pays back the investment.

Regarding collaborative design, this is not a free-for-all of an educating process; there is still structure. In setting learning goals, students complete detailed learning contracts, setting out what is to be learnt, how and what evidence will be gathered to demonstrate learning. Students sometimes mistake emergence for not making up their mind or being clear in their commitments, so the process of developing goals needs scrutiny and support on the part of faculty and students. The same is true as the learner embarks on the reading and written

work, contained by the assessment process described. Regarding the design process for residential modules, while it is shaped and often led by participants, this is overseen by experienced faculty who are looking out for costly mistakes, guiding the overall process where needed to ensure quality and focus on learning is maintained and that individuals are learning about their own process in parallel.

The same is true in the assessment processes – while the approach is highly

Finally, it is perhaps already obvious, but with so much personal motivation and responsibility on the line, people encounter moments of conflict and dissonance, within themselves and with each other. The awareness and capacity of faculty to spot these moments of risk and opportunity and navigate them carefully (not by rescuing, avoiding, persecuting or any other power play), are often reported later by students as crucial sources of rich learning, for the peer learning groups and for individuals.

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participatory, this does not equate to academic standards being left to chance. In order for this approach to be recognised by education institutions and by professional bodies, high standards of practice and quality are important. Therefore, learning outcomes and academic standards overall should be mapped against theory and practice that is recognised and benchmarked nationally and internationally. Self and peer assessment should be overseen by qualified faculty; standards and overall learning outcomes should be moderated. Some initially see this assessment route as a soft option but external examiners for the programme I undertook, regularly concluded that the standard of work they reviewed was superior to other master's programmes.

Tensions exist between many polarities that need managing (Johnson, 2014) across all three methods, such as: control vs autonomy; structure vs flexibility; task vs relationship; breadth vs focus. Leadership and management are therefore part of this process throughout. So, there is much to get right, as well as much to experiment and innovate in.

Conclusion

In these methods, a lot relies on the facilitators and faculty, yet they must avoid falling into dependency patterns with the group. The same is true of the students – it is not for everyone. There is a tension in offering advice to conclude a piece on participatory learning. However, if as an OD educator you want to hand more power to learners, or as a developing practitioner you want to have more agency in your learning, I think some principles help:

- » Hold knowledge and expertise lightly. Always ask: “is this really what is needed or wanted? Do I know? Have I asked? How will we discover the truth of this from each other?”
- » Trust at least as much in process as in content knowledge. Create strong structures in which to identify and talk about lived experience, knowledge and expectations, particularly where there are differences. At the heart of generating creative energy in participatory learning is well designed, yet lightly facilitated approaches, that help individuals and

groups find their authority and confidence. For example, clear group tasks, simple instructions and methods that work without a lot of management all tend to help.

- » Trust that ambiguity, while uncomfortable for most, may lead to more learning about personal reactions and blindspots than anything else. Find ways to hold and be in group processes so that everyone can occasionally feel lost and make mistakes without losing dignity or power.
- » Talk less and listen more. Ask questions that encourage open inquiry and challenge assumptions. Look out for a balance of voices in every group exchange and consider issues of power and inclusion constantly. Again, these dynamics are at the heart of a group learning well together.
- » Work with imagery and body based (Kenward, 2018) forms of knowing, not just linguistic forms, in order to connect with intuitive capacities and different voices in the group.
- » And finally, as someone once said to me, “remember that nobody is as clever as everybody”. Welcome all voices who wish to participate.

As ever, learning methods should evolve to our changing world and to new questions; for example, today, how educators can retain the integrity and power of social learning. Participants in their twenties still report that they prefer the peer learning group sessions face to face, even though they are adept in virtual spaces. But with social learning across timezones, virtual platforms are an important part of the mix, so how can we find the best of both? And where will learner-led curation go next, as knowledge creation and exchange continue to increase in speed and connectivity?

While there is complexity in these methods, it may encourage you to remember that there is a double benefit in this investment. For many I've spoken to, this shift in educating approach brings big benefits to one's own OD practice, developing the UoS in the educator as much as in the student. For example, when I encounter someone in a group today, struggling

with what they perceive to be a lack of clear structure to a task, my own education and educating experiences mean that I empathise with them better: I feel their anxiety or frustration but can trust that if they can stay with it, they may see something new. In allowing them their experience, they come to see a little more of their own perceptions, comfort zones, limitations and talents. The world needs our best selves doing good OD work, I believe. Educating ourselves and each other in more radical, participatory ways may prove a useful part of that endeavour.

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“The ways in which industries have dramatically speeded up create emotional estrangement . . . and risks us becoming disconnected from ourselves and from other people and cauterised from our feelings.”

OD and Love

By Helena Clayton

Why research love?

While some organisations are building extraordinary communities with purpose and passion and humanity at their heart even more appear to be becoming less human and less connected. As an executive coach and designing and running leadership development programmes across all UK sectors, I see up close and personal the price people are paying for this way of working. Anxiety and depression, numbing out, stress and burnout, people shut down and cut off from their feelings, anger and withdrawal . . . and the physical symptoms that go along with those. One organisation I worked with has a culture described as savage and brutal; another had a policy that allowed no compassionate leave for the death of a sister, only a parent; an engineering firm that was said to look after their machines more than they do their people; and the myriad examples of managers and leaders who treat their teams as if they were ‘bad robots’ and not fully human.

We hear about these practices at some of our major UK retailers or in the ‘gig economy’ which have been described as the new satanic mills of our generation (Lyons, 2019, Bloodworth, 2019) and we see the impact on the warehouse floor as well as in senior leadership. Corporate austerity policies ask us to do more with less and we pay a high price in levels of stress, mental health and wellbeing. In the search for ever greater rationality, efficiency, productivity and competitive advantage we appear to squeeze out our humanity.

Kahane (2010) feels that many of our organisations have become overly focused on power and a drive for realisation that can produce furiously commercial and competitive growth and creativity. That drive is vitally important, but it appears to be at the expense of emotion, our full humanity and our hearts. The ways in which industries have dramatically speeded up create emotional estrangement (Hochschild, 1985) and risks us becoming disconnected from ourselves and from other people and cauterised from our feelings. It seems that the way we are working today has created a tacit pact to have little space for emotional connection, which is something we seem willing to sacrifice in order to get the job done (hooks, 2000). Could it be that lovelessness is now the norm (hooks, 2000) and that work for many people is no longer a source of pride and fulfilment but instead is relentless, dehumanising and an assault on their dignity? (Bloodworth, 2018)

Beyond work, in the UK we know that the suicide rate is rising again (Samaritans, 2019), mental health problems are increasing and that self-harm in young girls is on the increase (McManus, 2019). We are also facing a global pandemic with coronavirus, a climate crisis with potentially significant societal fall-out, a fractured and unstable political situation and an increasingly ruptured and disconnected world. The fears about the rise of technology at work and what it means for our jobs and our identity are also very real. So, it seems both timely and urgent to seek ways to counterbalance

this with intention and purpose and explore ways of working that can put our humanity front and centre in our organisations. Where might we look for answers?

Alongside my corporate OD and leadership development work, I have been involved in the personal growth movement for an equal amount of time. As a way of understanding, healing and overcoming my own past personal trauma and difficulties, I have been involved in a range of therapeutic and leading-edge personal growth workshops from various traditions. In these spaces I have come to see that for myself but also for countless others no matter what the difficulty, trauma or stress, there is both healing and transformation when love is present and when these psychological wounds are met with love.

So, if our organisations and our ways of working feel loveless, then could love play a part in creating regenerative organisations that heal instead of harm? Despite these two worlds – corporate and personal growth – being very different could the philosophy and actions of love from one world translate into the other? Could what I was seeing so clearly in one part of my life be brought into the other part of my life? Could one world help to heal another?

Maybe. Although if so, I suspect we need to separate love from its over-connection with religion, romance and sex and find new ways of seeing and talking about love so it can be welcomed as a robust, pragmatic and accessible source of support for us as we navigate tough times in our organisations and also beyond.

What are the links between leadership, organisations and love? This was the inquiry that shaped a new piece of research (Clayton, 2019) I undertook, and which forms the basis for this article.

Researching love

The research was conducted over the autumn of 2018 and took the form of an online survey. There were 76 respondents:

- » 15% Board Director and 42% Director or senior Manager
- » 37% from organisations employing over 5,000 people

- » 40% from the private sector and 23% public sector

Based on six in-depth interviews with senior leaders in a range of organisations to ‘map the field’, I asked the following questions:

- » How comfortable do you feel talking about love at work? And why do you say that?
- » How important is love in the workplace? And why do you say that?
- » How do you define love at work and what leadership behaviours demonstrate love?
- » Have you ever worked anywhere where the leaders ‘led from love?’ How did this feel?
- » What enables you to lead from love? What blocks you from leading from love at work?

Key findings

From this research, I have selected three key areas to explore for their relevance to the field of OD, OD practice, and a practitioner’s Use of Self.

1. Love matters

94% of respondents felt that love at work was either very important (47%) or important (47%) They said that ‘humans work best in a loving environment – love is a core human need’ and that ‘if love is important in life, why wouldn’t it also be important in the workplace’. Respondents said with more love they could ‘shine more brightly’ and be ‘the best version of themselves’. It helped them to feel safe, and that feeling safe meant they could take more risks. Connections with other people would be much stronger and more open. They also felt that we needed love to help us ‘counterbalance the Victorian work approach of making money, the focus on processes and systems and the scientific underpinning of work that requires us to be emotionless’. Most people felt they had never experienced leadership that was loving but when they had it had been a stand-out experience.

So there seems to be a clear recognition in the data that love is core human need and one we should acknowledge when work has become increasingly focused on rationality, efficiency, productivity and competitive advantage. This might indicate that if love is a core human need and is central to who we are as humans beings, then organisations can’t be loveless, but rather that we are not creating the conditions for love to be more present.

2. Love matters, but it’s problematic

Despite the strong support for love, 30% of respondents said that they found love uncomfortable or very uncomfortable to talk about at work. Given the self-selecting nature of my respondents – they elected to take part in a survey about love – I would imagine that the number across a general organisational population would be significantly higher than that.

With connotations of either romance or religion, this response might be understandable to some extent. But that’s not what people were uncomfortable about. Instead they felt talking about love ‘would make me appear weak because generally love is perceived as weakness and weakness doesn’t belong in the workplace’. It felt ‘flaky and unprofessional’ and ‘too personal to be acceptable in the workplace’. People felt that ‘others will be dismissive’ and ‘the place for love is firmly at home and not work’.

It seems that love is ‘taboo’ and has gone underground (Marshak, 2006) and this may reflect several things. It could be that work is seen as refuge from our complex and often messy personal lives and that the lack of emotion in the workplace is considered welcome. It could also be that we have been encouraged to subjugate our emotions for so long that it feels too difficult to integrate them now. Or maybe we can see through the myriad policies that purport to make our working lives feel better as the instrumental actions that they so often are – ways to make sure we are productive and efficient for the organisation – and so we are mistrustful. We also need to consider that if the culture of our organisation is, in some part, shaped by the culture

of our leaders, then we should look at the impact of a small group of people, who are disproportionately represented at leadership levels in many of our organisations. These are people, mostly men, who went to boarding school as early as 8yrs and suffer from Boarding School Survivor Syndrome (Shaverein, 2015) as a result of shutting down feelings – especially those feelings that require a connection with vulnerability and intimacy – as means to survive the severing of parental attachment.

Whatever the issue might be, it will be vital to understand why love is problematic if we are to consider it as a force for good and for change in our organisations.

My research asked how people defined love at work and what leadership behaviours demonstrated love. Potentially, that focus led respondents to consider not love itself, but what a ‘work acceptable’ version of love might be. This feels fitting given my personal experience of talking to colleagues and clients about exploring love and many people assuming I mean empathy, compassion or kindness. In fact, I sense that people would *prefer* me to talk about those things and not *love* – and I often find myself needing to hold fast and explain that it’s love that I am researching.

3. How we describe love matters

For the research, I intentionally didn’t offer a definition of love, preferring to take a grounded theory approach and build a picture from the responses. My research asked how people defined love at work and what leadership behaviours demonstrated love. Potentially, that focus led respondents to consider not love itself, but what a ‘work acceptable’ version of love might be. This feels fitting given my personal experience of talking to colleagues and clients about exploring love and many people assuming I mean empathy, compassion or kindness. In fact, I sense that people would *prefer* me to talk about those things and not *love* – and I often find myself needing to hold fast and explain that it’s love that I am researching. This seems to match the response of

some of my respondents who find that love is a problematic subject to explore for the workplace. In this regard, this piece of work should be considered as a precursor to a more in-depth exploration of the literature to more clearly define what love is both for the workplace and beyond.

From my respondents, love in the workplace, was primarily represented by the word *care* which appeared many times. *Listening* came a close second, giving people undivided attention and putting aside your own agenda. This isn’t leadership as a performance art but as genuine interest in others. Another theme was *empathy* and *compassion* and the ability to see

something through someone else’s eyes and experiences – even ‘hyper empathy’ for one respondent. Equally strong was the theme of *accepting* people for who they are, warts and all, no matter what. The final theme was setting *high standards* both in terms of holding yourself accountable first and holding high expectations of others and having the courage to hold them to that and having the difficult conversations when necessary.

This is a useful list in that it helps us to understand how we might see ‘love in action’. Yet I would argue love is also something more – something ‘other’, something mysterious, something that we can’t necessarily deconstruct in order to understand. At this stage of the research I am reluctant to define love too closely and risk simplifying or reducing.

Nevertheless, I have a current working definition which allows us to make a meaningful connection between love and our organisational life and to the field and practice. This is love as ‘radical acceptance’.

Acceptance is such a powerful theme in the much research and literature from humanistic traditions (Rogers, 1967, Heron, 1980). How, in our organisations, in ourselves and our practice can we accept everything someone is and not reject it, or them? How, as in the world of improvisation, can we treat everything as if it’s an offer and find a way to say ‘yes, and’ instead of ‘yes, but’ (Johnstone, 1981). How can we create the conditions in our teams and beyond to make everything welcome?

But it’s more than acceptance. For something to be considered love we need to include *radical*. *Radical* comes from *root/origin* and there is something so core and fundamental about our need for love that we cannot ignore it in our working relationships and in the world more widely. *Radical* also means extreme and it seems to me that love demands that we really put ourselves out, dig deep, and sacrifice something. We have to overcome something in ourselves in order to love those who are not like us, who are not our family, who we disagree with, or who may have hurt us or even those who we have been randomly assigned to work with. *Radical* also implies exponential difference and this allows us to consider love as a form of power, as political and as in service of revolutionary change. After all, all great movements for social justice have strongly emphasised a love ethic (hooks, 2004, Kaur, 2018) and so love needs to be part of the necessary change that’s needed now both for organisations and society. In OD we have the concept of the ‘tempered radical’ (Meyerson, 2001) where although we might temper our approach to ensure that we are not too dissonant within our organisation, we also hold a radical, bold and countercultural vision for what we want to achieve. So *radical* lays down an invitation for us to be bold and take risks because love is bold and risky and revolutionary – and that is exactly what’s needed for the human future of our work. Tough times call for radical approaches.

There is one more aspect of love which did not appear in the primary research and yet I believe is a critical dimension. It is aligned to the idea of love as being essential to revolutionary change mentioned above, and this is love as *righteous anger*. This aspect of love sees and identifies what is not acceptable for us and for others and allows us to respond with ‘this is not ok’, always clearly and sometimes very strongly. This is the aspect of love that allows for a passionate conviction that some things are worth fighting for and protecting, the aspect of love that sets clear boundaries in terms of what is right and wrong.

So, from this short research project, it seems that the desire for love is strong and the rewards of leading from love are clearly there, for both people and organisations and yet it’s clearly problematic, takes conscious choice and involves risk as well as reward. Love is care, empathy, compassion and deep listening, as well as, radical acceptance and righteous anger.

There are many implications of this research for the discipline of OD itself, for organisations, for OD practice, and for the practitioner’s use of self.

The field of OD

If love matters, then how might it matter for the field of OD? OD is one of the few disciplines to have a set of underpinning values (Cheung-Judge and Holbeche, 2011) generally considered to include democracy, human growth and flourishing, inclusion and participation, that are made clear in most core OD training and education. These need to be kept relevant, enough, as well as, necessary and, I suggest we need to add love to this list.

Consider first that ‘one has to bear in mind the backdrop against which OD entered Western society, where racism, the aftermath of Nazi Germany, the massacre of Jews and the breakup of community all played a major role in organisation and community’ (Cheung Judge and Holbeche 2011, p224).

What equally significant and threatening events does OD need to wake up to today? Perhaps the rise of populism and the possibility of fascism; the climate

emergency and the prospect of societal collapse; and the increasing fragmentation and separation that we have from each other.

If we are facing exponential, widespread and possibly frightening changes to our world then these changes will have major impacts on the structure and culture of our organisations, as well as, the mental health of the people within them. In this scenario, many people (Bendell, 2019, Wheatley, 2017, Macy, 2012) believe that we will need an intentional and specific focus on the human qualities of hope and love if we are to adapt.

If we accept that ‘we can’t allow cultural codes to emerge by accident’ (Anderson, 2019, p54) and if, in conjunction with the leadership, OD has an explicit responsibility to focus on the human flourishing of people in organisations then this implies that we need to develop the field of OD to be a discipline with love at its heart. Given our origin story, OD needs to fully own its social and global responsibility and more strongly claim its aim to help create a better world.

If love matters, then now might the time for OD to take a stand for love and become a vocal and explicit advocate for love being at the heart of our workplaces. Organisations are becoming more and more techno-rational and run by algorithms (Leonhard, 2016) and our role in OD is to strengthen the human dimensions of organisations as a counterbalance. There is nothing more deeply and uniquely human as our capacity to love and so I would argue for love being firmly at the heart of the field of OD. And, if we can allow that love is also righteous anger, then that gives the field of OD permission to take a stronger stance of advocacy that this is the right thing to do.

Shaping our organisational practice

If love were a core value of OD, what might that mean for our organisational systems? There are two actions that we might consider, one specific and the second more general.

The first, more specific action, is that a more loving organisation, with care and

nurture at its heart, will actively design in practices to acknowledge and create space for people’s grief, trauma and loss, emotions that are usually not acceptable in organisational life. In addition to the reported rise in mental health issues in the UK, two things feel especially relevant. First, we are learning more about the ways that early years trauma, often described as Adverse Childhood Experiences (ACE), is much more prevalent than we ever thought (Association of Directors of Public Health, 2019). ACEs can be as ‘normal’ as economic hardship or parental divorce but can also include physical and sexual abuse. Through this work, we are starting to understand that many more adults than we might have imaged are carrying the wounds of childhood trauma, and these inevitably find ways to play out in organisations as this trauma gets retriggered in the stress of organisational change (Stuart, 1996). Also, we are seeing a new and growing eco-grief and despair, that is being reported via the therapeutic community (Cunsolo, 2018), as people struggle to find ways to respond to the escalating climate emergency. In a society that has a tendency to be grief-averse, it seems that we may be slowly acknowledging the presence of grief as an essential part of change and transition (Macy, 2012) and so this shift also needs to be reflected in more loving and compassionate ways of working with people within our organisations.

Secondly, and more generally, if love is a core value, we would need to consider all our OD interventions through a lens of love. We would take each model, framework and intervention and ask ourselves ‘where is the opportunity for love here?’ or ‘how can we make this piece of work more loving?’ or ‘what would be a more loving version of this policy?’ I would argue that most of our underpinning models and frameworks are based on mechanistic and instrumental assumptions and don’t naturally allow space for emotions like love. We therefore need to be intentional about bringing love into our work.

Perhaps if our systems and processes are intentionally and purposefully redesigned for greater love – more compassion, kindness and acceptance – then our

organisations become places of greater psychological safety and even places where healing can take place.

The practitioners use of self

Finally, what does this mean for the individual practitioner and their Use of Self, arguably the most important instrument at our disposal? I see three key implications.

In part, the role of the OD practitioner is to bring and be difference, to take a liminal role and observe or 'feel into' what is lacking or deficient in a system, find ways

Secondly, the way we practice OD is directly influenced by our own personal social history. We might all be introduced to the same tool or framework or have completed the same OD programmes with a shared set of values and assumptions, but the way that we use that theory in practice is wholly dependent on our own epistemology and how we see and interpret the world. Our epistemology is primarily based on the family and the culture in which we grew up. We have a responsibility as a practitioner to understand this ground we stand on, which includes understanding the role

importance of *self-care*, but if we are willing to consider the term *self-love* as a competence for practitioners, then we are invited to ask if we can give to ourselves those behaviours and attitudes that we consider appropriate for our organisations and their people. For example, can we extend radical acceptance to ourselves? Can we find what matters to us enough that we will fight for it and hold firm boundaries around it?

Conclusion

It is clear from this research that if love is considered an essential element for our lives then it could equally be so for our working lives. Therefore, I would argue that love needs to take equal place alongside purpose, meaning, inclusion and human flourishing, as we in OD consider how to design and support organisations, their cultures and their people to face the future. This invites us to consider the role of OD itself and not only ask 'what is OD for' but 'what *should* OD be for?' given the changing external context we are facing.

It is also clear that introducing love to organisations is problematic and not straightforward. It comes with the requirement that we understand much more about what makes love feel taboo in organisations, as well as what conditions might enable love to be more present and the role OD can play in that.

Finally, both these things require individual practitioners to consider their own relationship with love and their own appetite for taking a stand for something that can feel radical and different.

If love matters, then it matters for OD and we would do well as a field to consider this more deeply.

This research project should be considered as a pilot study for further inquiry which could include: further work to define what love means for an organisational context including in countries and cultures other than the UK; a deeper understanding of what blocks and enables us to talk openly and explicitly about love; and examples of what love-in-practice means for us in organisations.

The OD literature often refers to the importance of *self-care*, but if we are willing to consider the term *self-love* as a competence for practitioners, then we are invited to ask if we can give to ourselves those behaviours and attitudes that we consider appropriate for our organisations and their people. For example, can we extend radical acceptance to ourselves? Can we find what matters to us enough that we will fight for it and hold firm boundaries around it?

to raise that in the organisation's awareness, and then bring the system more of what it needs. One way we do that is to bring in new ways of working. Another way is that as practitioners we model that difference ourselves. This is no small undertaking. We are asked to find the balance between being different enough, yet not too different that we risk rejection. As practitioners, this means we must find a way to be fundamentally different from, and possibly at odds with the dominant culture of our organization, even to the point of being an outsider within our organisation. This requires a great deal of courage for us as individuals, to remain on the edge of a group, and to intentionally behave differently from normative behaviour (Meyerson, 2001). So if we can accept the idea that organisations are lacking love, and we also accept that the role of OD and OD practitioners is to hold the organisation to its highest moral purpose, then we each need to ask ourselves if we are willing to take a stand for love – which will include being more loving – and risk being too different.

love plays in our own lives. Therefore, in service of bringing more love into our OD practice, we may have to consider where we first learned about love, from whom, and what love looked and felt like in our childhood. We would do well to know how we experience and express love now, what enables us to feel connected to love, what blocks us from a connection with love and what the implications are for the ways that we practice OD.

The third dimension of love that is relevant to the practitioners use of self is self-love. Many of us in the field of OD might categorise ourselves as being part of the 'helping professions', either being on the fringes or at the core. The helping professions are typically defined as those where a great deal of emotional investment is required in order to respond to the human needs they are dealing with (Skvokholt, 2016). OD practitioners may therefore need to pay attention to their own physical and psychological resilience and well-being as they extend themselves to support others. The OD literature often refers to the

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“... the basic human dynamic remains challenged by the same primitive collective unconscious forces, whichever group the individual finds themselves in. By opening ourselves up psychologically to experiencing these forces, we can best harness the potential of the OD intervention.”

Tackling the OD Iceberg

Understanding the Unconscious Life of Groups and Teams and Its Relevance for the OD Professional

By Kathy Holmes-Bonney

In this article I hope to bring to life the deep value brought to the OD world by some pioneers of group analysis. The place that primitive unconscious forces play when individuals join together in groups.

In the 1920's, a number of psychoanalytic thinkers turned their attention to the unconscious communications of individuals when placed in therapeutic groups. Sigmund Freud was amongst the first to begin exploring some of these traditional psychoanalytic concepts in the context of the group situation.

SH Foulkes, one of the founders of the school of group analytic thinking, called that unconscious web of communication that operates in the group situation, the group matrix (1957,1965,29). The group matrix he believed, is the combination of three main things, the emotional expectation to being in that place at that moment, the individual's previous experiences of being in similar situations and the level of anxiety the individual feels about being there.

Foulkes believed that the “here and now” is the analytic medium for working with therapeutic groups and future thinkers, me included, believe that this can also be applied to working with teams.

When working in this team space as an OD Professional, it is essential to keep the focus on what is in the “here and now” unconscious space. To not allow yourself to be distracted by what is being actually talked about, although accepting that at times this can also be a metaphor for what is being felt.

A case study

I am in my second team development session with a particularly challenging perinatal mental health team. The genesis of the work is an unsuccessful merger of two previous teams. This session begins apparently well as we reflect on what we had agreed at the last session and begin to unpack what has gone well and what has not since then.

Suddenly the room erupts, the charge as it felt, is led by Jacob who begins to talk in a very loud and aggressive manner. I had suspected when we had last met that Jacob acts as the team's unconscious receptacle of all that is consciously unpalatable. The first outburst is a significant attack on three colleagues who are members of his original team. Jacob believes these colleagues have driven another member of the team to leave. His descriptions are always graphic. I had reflected back to him at the previous team development session, that whilst he has something important to say, it is hard to listen to him.

On this occasion I make a conscious effort to listen despite how hard I find it to do so. He talks of “you three witches cooking up trouble” and “I wish that I could stab you all and watch you bleed”. My feeling at this point is a fear of being out of control and of wanting to run away. Jacob then turns his anger on Katy the most senior member of his original team and he starts shouting at her that she is never there. She begins to shout back but becomes tearful and leaves the room. We

wait in quiet awkwardness and then Katy returns still visibly upset.

On her return I attempt to unlock the situation by reflecting back to the team what I have observed and felt during the last 15 minutes. Jacob, I tell them is I feel, used by the rest of the whole team to express how others are feeling. I say that my observation is that deep down it feels really bad to be a member of this original part of the new team. I say to them that it feels a risky place to be right now and that Jacob needs all their help to stay safe.

As an OD Practitioner you may enter a room upbeat and ready to make things happen but whilst in the room, begin to feel like you are carrying a heavy burden. Having the space in a team development session to call out these “use of self” experiences is often critical to building a high performing team but absolutely essential in teams where relationships have become disrupted.

I talk about my feeling of a sense of desperation but also deprivation in the one half of the team. I talk to them about the fact, that in the other half of the team at the beginning of the session, there was talk about love and biscuits.

Melanie Klein pops into my head, I remember the psychological defence of splitting, I share with them this good breast, bad breast picture. There is silence and a sense of calm comes over the room, I ask them what they are going to do to make this a nicer place to be.

I consciously remind myself that it is important at this delicate stage to keep the focus on what is in the room. To not let them look for someone else, including me, to solve their problem. I think of Wilfred Bion who talks about a series of group defences and the “coming of the messiah”. He talks of the group’s search for a “group deity”. (1961; 148). I tell them my thoughts.

I wait in difficult silence, when after some time, one of the team asks me to tell them how to move things forward. I am ready for this and thus resist the urge to save them. Instead I tell them again what has popped into my head firstly I repeat

Bion’s thinking and also say I am reminded of a story retold by Irvin Yalom concerning two rooms. (1931,1985,13) which I tell them.

In this story, each room has a table with a pot of stew and long handled spoons on it and people sitting around it. The length of the spoon handle makes it impossible to feed yourself. In one room the people are starving and miserable and in the other they are well fed and happy. The difference is in the second room people have learnt to feed each other.

I finish the story and wait, once again resisting the considerable pressure to fill the silence, I am acutely aware of a sense of them again desperately looking for the solution outside of themselves, instead of seeing themselves as a solution.

After this next excruciating silence, one of the team members Barbara, previously branded by Jacob as a “witch” says to him, it must be very difficult to feel as you do, Jacob replies yes and thank you. I sense this as the opening of a door, and I reflect this back to the group.

The use of self and bearing the silence in this whole scenario was absolutely crucial. This is a group made up of consultant psychiatrists; psychologists; psychotherapists; mental health nurses. While it would have made intellectual sense to share group theories with them, it would never have got to the bottom of things. The use of self enabled a collective sense of understanding in the “here and now” for those present and they began to help each other.

The extent to which their plight was born out of their own collective unconscious (Jung, 1968) or it was being driven by unresolved patient transference (Freud,

1955) is not clear. But by sitting with the silence and calling out into the conscious the unconscious processes at play, it allowed the team to recognise them.

What was planned as a regular team development session become a deep and emotional experience for them and for me. But intentional use of self, and silence, despite how dangerous it felt at times, made it possible for them to move forward.

We returned at this point in the session to our original agenda of action planning for improvement. It was no surprise that one solution was to plan on regular lunch together and biscuits at team meetings.

Since this day the team have continued to work to improve things, with Jacob entering some psychological sessions to understand the role he plays for others and the risks that brings for him personally and professionally. Katy and Jacob have entered into mediation and now are able to work together and the rest of the team have returned to more professional working relationships.

As an OD Practitioner you may enter a room upbeat and ready to make things happen but whilst in the room, begin to feel like you are carrying a heavy burden. Having the space in a team development session to call out these “use of self” experiences is often critical to building a high performing team but absolutely essential in teams where relationships have become disrupted.

A modern-day application of this thinking can be applied in the context of sports psychology. Rialto and Eriksson (2001, 31), talk about the football team and the team’s performance cage. This metaphor depicts how some teams collectively and unconsciously limit their success because of a belief that together they cannot win. Such teams will look outside of themselves for the solution, playing the game at home or away, a favourite charm, a lucky pair of boots or a team ritual, or they will rely on one team member to rescue them.

This placing of what we call their “locus of control” outside themselves is a modern day take on Bion’s messiah and leads them only to an even greater distance

from the truth. The truth is in fact, that their success is locked in their very being and amongst them as a team. Their success in OD terms, actually exists in the unconsciously present group matrix.

As OD professionals, our role in all of these scenarios is to call out what we can see but they cannot, by using our own self to experience what is happening and then be able to describe it in a meaningful way to others.

In her article entitled Exploring the OD Concept of Use of Self (UoS) Mee-Yan Cheung-Judge (2001) offered several definitions but the ones that sum it up best for me are

“To be able to be relevant in the here and now takes a person who is centred, sensitive, flexible, who has tolerance for ambiguity and who can stay with the immediate situation and help those with whom s/he is working to flow once again with the river.”

—Tannenbaum (1979)

“Use of self consists of intentional, conscious and deliberate choices which result in action/behaviours taken to bring about change.”

—Seashore, Shawyer, Thompson and Mattare (2004)

Mee-Yan talks in her article about a term called the ‘BIG I intervention’ which she says means “the deliberate deployment of self, regardless of who the others or the environment are, in the here and now moment, to create the impact the system requires”. As OD professionals we must be able to be open to our immediate environment, how it feels, what it is saying to us and be able to feed that back in a language that others understand.

An eclectic set of understandings allows for this meaningful dialogue. For example, using the concept of a performance cage or that of debilitating performance anxiety, rather than collective unconscious or group anxiety, allows for these complex unconscious processes to be accessible for use in different fields.

This is of course always with the knowledge, that the basic human dynamic remains challenged by the same primitive collective unconscious forces, whichever group the individual finds themselves in. By opening ourselves up psychologically to experiencing these forces, we can best harness the potential of the OD intervention.

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“... *use-of-self* includes a capacity for reflection, feedback, and mindful consideration regarding what occurs when we attempt to influence problems, people, or situations, and that resulting level of awareness of presence is key to driving solutions and action in diverse scenarios and roles, including in organizational research.”

Employing Use of Self for Transparency, Rigor, Trustworthiness, and Credibility in Qualitative Organizational Research Methods

By Anton Shufutinsky

The field of organization development (OD) often utilizes scholar-practitioners who rely, at least partially, on evolving research-based interventions in order to help drive effective organizational change (Bartunek, 2011; Marshak & Grant, 2008). Organizational research methods are performed by researchers and scholar-practitioners for the purposes of generating knowledge, testing application of knowledge, and conducting organizational action research. Organizational research may warrant various methodologies to investigate interesting and important questions relative to management, change, leadership, and culture in organizations. Depending on the research needs, a range of research approaches may be employed, including quantitative, qualitative, and mixed-methods.

While quantitative research methods traditionally answer questions from a functionalistic approach, many organizational studies seek answers regarding rich accounts from organizational members, depicting stories from experiences that provide the specificity necessary for understanding the dynamics that exist among and between groups and individuals, including leaders, employees, shareholders, and other stakeholders. This line of inquiry lends itself to qualitative research methods. Qualitative methods, however, continue to receive criticism, often surrounding a general misunderstanding or lack of clarity of research purpose, rigor, validity, and transparency in research design, and this scrutiny is particularly present with regard to interpretive

analyses used in qualitative inquiry (Gioia, Corley, & Hamilton, 2012). The organizational dynamics, as explored with qualitative methods, may be more effectively executed through the effectual deployment of, and transparency around, use-of-self methods and tools. This paper presents and describes methods of use-of-self that can be used in qualitative inquiry during scholarly and action research in order to increase transparency, rigor, credibility, and trustworthiness of the research processes and the data presented and described.

Reasons for, and Benefits of, Qualitative Inquiry

Qualitative research methods vary broadly, and include narrative inquiry, phenomenology, grounded theory, ethnography, case study, process research, and action research, all of which potentially yield valuable information for OD practice. One argued benefit of qualitative inquiry is the ability to build theory, as data doesn't result in theory on its own, but requires the researcher to employ data to build theory (Mintzberg, 1979). In order to build theory, richness of data is necessary, often accomplished through rich descriptions of experiences through the anecdotes of study participants (Boje, 2019; Mintzberg, 1979). It is the evaluation of these rich data that provide the understanding of complex phenomena from the perspectives of those living them (Fusch & Ness, 2015; Miles & Huberman, 1994; Shah & Corley, 2006). Contrasted with theory generated merely by logical deduction or *a priori* assumption,

as often seen in quantitative functionalism, sound qualitative theory-building methods, such as grounded theory, arrive at theory through inductive and abductive processes from systematically obtained, reviewed, and analyzed data (Boje, 2019; Charmaz, 2014; El Hussein et al., 2014; Glaser & Strauss, 1967).

Qualitative methods allow the researcher to discover the inter-related dynamics, new variables, and relationships of these experiences and to illustrate the influences of their social contexts (Creswell, 2013; Gioia, Corley, & Hamilton, 2012; Shah & Corley, 2006). However, this is rooted in interpretivism, and interpretive research also means that data and outcomes will vary depending on the participants and researchers (Shah & Corley, 2006). Every researcher conducting a study will have a unique perspective regarding the data and a potentially varying interpretation of results (Labianca, Gray, & Brass, 2000). As such, the data analyses cannot be judged on study repeatability and replicability, such as in quantitative research, but rather on the ability to provide plausible insight from a deepened understanding of the phenomena, which is only possible through interpretation of phenomena through data collected from those experiencing them (Shah & Corley, 2006).

One of the critical underpinnings of qualitative research is that participants' narratives of their experiences are not flat, linear, and fixed. Boje explains that organizational research is about storytelling processes and that organizational narratives are complex (Boje, 2019), are dynamic and multi-dimensional, and affect the way experiences are lived, explained, and understood. Boje (2019) defines these dynamics as antenarrative, explaining that they exist in states of multiplicity of spaces, times, and materialisms. Essentially, Boje posits that narrative stories are incomplete or inaccurate without the antenarrative, which is the process of sensemaking of stories that includes the exploration of that which is hidden from the surface of narratives during interviews, and thus not observed. This includes what occurred before the narrative interviews, between interviews, what exists in the underlying stories beneath the

current narrative, during the process of becoming the narrative, and the bets made on what lies in the future (Boje, 2019). All of these antenarrative aspects affect the living and breathing story (Boje, 2019).

The concept of antenarrative is similar to Connelly and Clandinin's (2006) conceptual framework of narratives existing as constructions of space, temporality, and sociality, meaning that they are lived and experienced in time and transition, space, and social and sociological geography of the individual, and thus cannot be identical for any two individuals (Connelly & Clandinin, 2006). Experiences are thus determined and affected by many factors including the location of interviews, shifts in mood, past and present experiences, emotions, beliefs, hopes, desires, and social interactions between the researcher and the participant (Boje, 2019; Connelly & Clandinin, 2006; Shufutinsky, 2019). In qualitative inquiry, the unit of measurement is directly affected by social situations and relies heavily on the reflexive interpretation of the researcher. Thus, due to non-standardization and differentiation in methodological processes, qualitative research has been scrutinized as being inherently biased and lacking analytical discipline, rigor, credibility, and transparency (Charmaz, 2014; Gioia, Corley, & Hamilton, 2012).

Criticism of, and Concerns Regarding, Qualitative Research

Because qualitative inquiry is particularly constructivist-interpretive and is dependent heavily on the interpretation of the researcher, personal perspectives driven by cultural upbringing, life experiences, values, prior knowledge, and situational beliefs are bound to be introduced into the data during analysis and theory generation (Labianca, Gray, & Brass, 2000; Shah & Corley, 2006). Thus, despite analyses and theory generation being data-driven rather than logico-deductive personal ideation or assumption (Boje, 2019; Charmaz, 2014; El Hussein et al., 2014; Glaser & Strauss, 1967), qualitative methods are often still strongly interpretive, and antenarrative artifact creep – the hidden temporal, spatial, and social aspects surrounding narrative

stories – is inherent where the researcher is the instrument of the research. Thus, there are considerable questions and concerns regarding the potential for confirmation bias and other biases to take root (Shufutinsky, 2019). Therefore, despite all its richness and potential for discovery, qualitative inquiry methods have been critiqued as invalid and too often lacking in analytical discipline and scholarly rigor (Bryman, 1988; Campbell, 1975; Campbell & Stanley, 1963; Gioia et al., 2012).

A critical question regarding the validity of qualitative research has to do with establishing how inductive researchers can apply systematic conceptual and analytical discipline that leads to credible interpretations of data while simultaneously convincing readers that the conclusions are plausible, unbiased, defensible, and trustworthy (Bryman, 2016; Gioia et al., 2012; Shah & Corley, 2006). The answer to this question is not a simple one, but it is evident through practice that, in addition to developed structural methods, the answer lies at least partially in effective *use-of-self*.

Use-of-Self

Among a variety of definitions regarding *use-of-self*, one that is generally accepted and referenced is that *use-of-self* is “... the conscious use of one's whole being in the intentional execution of one's role for effectiveness in whatever the current situation is presenting” (Jamieson, Auron, & Shechtman, 2010). It is about using one's being and what one knows about it, intentionally, to positively impact the situations at hand (Jamieson & Davidson, 2019).

Use-of-self enables the engagement of emotional, physical, psychological, and spiritual factors in the moment and in a diversity of situations (Jamieson et al., 2010; Shufutinsky & Long, 2017), and the term encompasses numerous aspects of *self* and behavior, including self-awareness, situational awareness, mindfulness, self-knowledge, self-monitoring (Huebner, 2019), identity, and agency. *Use-of-self* serves as a link between our internal, individual potential and the world of change, and it is a connecting fabric of the concepts of self-awareness, choices, and actions as

fundamental infrastructures of our capacities to be effective agents in organizational processes (Seashore, Shawver, Thompson, & Mattare, 2004). Being vital for many impactful professions and positions, *use-of-self* includes a capacity for reflection, feedback, and mindful consideration regarding what occurs when we attempt to influence problems, people, or situations (Jamieson et al., 2010; Seashore et al., 2004), and that resulting level of awareness of presence is key to driving solutions and action in diverse scenarios and roles, including in organizational research.

Need for Use of Self in Qualitative Inquiry

Qualitative research is generally rooted in interpretivism, and the constructivist-interpretivist philosophies veer from traditionally positivist research underpinnings and instead suggest that social situations form units of analysis. Thus, qualitative inquiry often relies on the reflexivity of the researcher and emphasizes that experiences and data exist in multiple realities, including those of the researcher, and that data interpretation and theory development therefore lie at least partially with the researcher's perspectives in the embedded situations (Bryman, 2016; Charmaz, 2014; Shufutinsky, 2019). The researcher is responsible for much of the data and the manner in which the data is managed during collection, analysis, and reporting. Thus, the researcher is generally the main instrument of the research, collecting, analyzing, interpreting, and reporting the study findings. This is why *use-of-self* by the researcher is vital to the validity and credibility of qualitative research.

Means of Use of Self in Qualitative Research

Use of self is critical in qualitative inquiry because it is a method of addressing the potential biases associated with the main research instrument. The author being the main instrument of the research is one of the major criticisms regarding qualitative research methodologies, claiming that the process is less systematic and increases the

likelihood of biases based on researcher knowledge, experiences, ideas, beliefs, values, and pre-suppositions (Creswell, 2013; Moustakas, 1994). However, this is often a result of misunderstanding and ignorance regarding methods that researchers can and do often use for minimization of biases in the qualitative research process. These tools, used for minimization of confirmation and other biases, are a collection of instruments that are categorized as bracketing and epoche methods, and their purpose is to utilize techniques to bracket or set aside previous knowledge and pre-suppositions regarding the phenomena identified during research data collection, analysis, and interpretation.

Bracketing and Epoche. In order to limit confirmation and other biases in qualitative research, especially but not exclusively in transcendental, non-interpretive narrative and phenomenology methods, epoche and bracketing must be achieved (Butler, 2016; Creswell, 2013; Giorgi, 2009). Bracketing methods are methods intended to mitigate the potentially deleterious effects of preconceptions and presuppositions that could taint the research being performed (Tufford & Newman, 2012). Epoche practices are those practices that allow the active suspension of pre-supposed understandings in a reflective way, cultivating curiosity (Creswell, 2013; LeVasseur, 2003). Bracketing and epoche are often used interchangeably in practice (Butler, 2016). These practices can include entering a place of internal consciousness with the readiness to embrace and understand the self, aware and present in the experience of life and the state of being of the self (Moustakas, 1994). The process of qualitative research, such as narrative and phenomenology, begins with the self (Butler, 2016) because the researcher, as the main instrument of the research, must be constantly conscious of and understand his or her internal ideas, perceptions, values, judgments, and connections of the topic under study to one's own past (Butler, 2016; Creswell, 2013).

However, despite overwhelming agreement that the need for bracketing in qualitative inquiry exists, there is little

agreement on methodologies to achieve it, and often no mention in peer-reviewed articles and dissertations describing how it is met during study, discussing only that it is performed (Shufutinsky, 2019). The extant literature regarding qualitative methods and studies that use them is simply not forthcoming in describing the use of epoche and bracketing (Bednall, 2006), thus leaving readers and novice researchers wondering and guessing how epoche and bracketing are carried out, and simultaneously instigating the disqualification and criticism of qualitative work by critics who decry likelihood of bias, lack of rigor, and invalidity (Chan, Fung, & Chien, 2013; Shufutinsky, 2019).

Epoche and bracketing are instinctive practices in using self, affording the researcher the ability to perceive the world around as well as the internal world of the individual (Seashore et al., 2004). In order to effectively set aside past knowledge and understanding, individuals must be self-aware and have the ability to be in the moment during the research process (Shufutinsky, 2019). Therefore, it is vital to use specific methodologies to achieve epoche and bracketing needs, including *use-of-self* through a diversity of *self*-related practices for self- and situational- awareness and reflexivity (Hasson, 2013; Jamieson et al., 2010; Moustakas, 1994; Seashore et al., 2004) for effective, trustworthy, and credible qualitative research.

Although epoche is a tool used to aid in deriving new knowledge through research, it is also viewed by many researchers as an experience in itself (Moustakas, 1994), one through which there is considerable dialogue with the *self*. Research exists on the use of mindfulness throughout various professions including psychology, management, leadership, health care, and safety, among others (Rosenberg, 2010; Shufutinsky & Long, 2017), and is likewise applicable in professional academic and organizational research. The literature shows an increase in effectiveness and an enhancement of work when reflective practice is undertaken because reflection pushes mindfulness and opens individuals to understanding their interaction with others and with the world

(Rosenberg, 2010; Shufutinsky & Long, 2017), allowing them to identify potential biases and to block them or use them transparently in order to derive accurate research knowledge.

Employing Bracketing and Epoche. A combination of use-of-self related methods can be used to achieve and display bracketing and epoche in qualitative research, thus enhancing rigor, validity, credibility, and trustworthiness. These approaches, used in order to prevent to the highest degree possible any personal influences from biasing data collection and analysis, include the use of (a) ecliptic self-bracketing, (b) prevention, (c) self-transparency, (d) mindfulness, meditation, presencing, and self-reflection, (e) purposeful self-exclusion, and (f) reflexivity.

Ecliptic Self-Bracketing. Ecliptic self-bracketing is not a methodology in and of itself, but is rather a methodological timeline in which the bracketing of presuppositions and current beliefs, regardless of which method of *use-of-self* is used to achieve it, is performed throughout the entire research process from topic selection, to literature review and method design, to data collection, analysis, and reporting, as displayed in Figure 1. (Shufutinsky, 2019). Historically, bracketing in qualitative methods, particularly in phenomenological research, is established in the analysis stage. However, this leaves a potential for previous experience, knowledge, and assumptions to take root and create presupposition in the early stages of the research, including in the design of the study. Understanding personal views and positions relative to the study at hand, and reflecting on those, is critical at every step of the research in order to be certain that biases are identified and minimized, or at least made transparent, throughout the research cycle.

Prevention. One of the more effective means of dealing with biases that arise in organizational research is preventing their development as much as possible, as experiences, values, beliefs, and thoughts that affect perspectives already existing in all people. One means of doing this is



Figure 1. Ecliptic Bracketing.

by postponing the comprehensive literature review until after data collection. This is counter-intuitive to most traditional research, because most literature reviews are performed in order to identify current knowledge from previous research to aid in hypothesis development and testing. In fact, it is required under some qualitative methods, often in both phenomenology and grounded theory, not to begin literature review until after data collection. This limits the amount of the researcher's knowledge on existing outcomes, thus limiting theoretical knowledge and presuppositions and curbing bias in method development, question development, and conduct of interviews and other data collection (Glaser & Strauss, 1967).

Self-Transparency. Whether performing a quantitative or a qualitative study, one of the most important attributes of a study is transparency. The reader should be able to understand what the researcher and writer did during the conduct of the research in order to yield the results that are presented in the findings. This not only allows other researchers to repeat or test a study, it also permits

readers and stakeholders to understand the steps that were taken, and any limitations and strengths that existed during the performance of the research. Additionally, it aids future research by providing an open account of the methodologies for the entire research study so that follow-on research can be targeted at expanding study regarding interesting findings or making method modifications for testing resulting theory, among other things. This transparency should exist not only with regards to the methods and procedures, but also in reference to the researcher performing the qualitative inquiry, so as to understand the state of mind, experiences, aims, goals, and beliefs of the researcher, and the direction of the research, and how they affect or are affected by one another. The researcher can be transparent about the *self* to the audience, but also can find means of continuous self-transparency to aid the rigor, unbiased, and trustworthiness throughout the research cycle. This can be accomplished through methods such as autoethnographic narrative reporting, journaling, and memo writing (Creswell, 2013).

Auto-ethnography. People often undertake research because they have a

connection to the topic, and thus the *self* is inherently involved in the study (Creswell, 2013). Autoethnographic narratives are one means of using *self* in research, providing *self*-transparency relative to the topic of the research and the experiences of the researcher. Autoethnography requires the practice of *self*-reflexivity and *self*-observation (Butler, 2009) because the practice of *self* as instrument and mindfulness connects the conscious with the unconscious, and opens the door to *self*-awareness and presence in the moment (Jamieson et al., 2010; Senge, Scharmer, Jaworski, & Flowers, 2004; Shufutinsky & Long, 2017), dur-

remainder of the research, while also offering transparency to the audience regarding the researcher's experience, history, and investment regarding the topic.

Memoing and Journaling. During qualitative inquiry, researchers use multiple tools involving the *self* in order to consider ideas and thoughts, record them, and save them for later analysis. Two of the common methods for accomplishing this are journaling and memo-writing (Creswell, 2013). They are similar, and potentially accomplish some overlap, but have different purposes.

Journaling can be used to provide

... autoethnography provides the researcher with the facility to engage directly in the power and agency of contribution to the qualitative representation of a marginalized group while also garnering transparency to reduce biases by allowing the reader to see the connections of the researcher to the research. Thus, the researcher reveals personal experiences, stories, emotions, beliefs, and thoughts on the topic, pressing the need to be mindfully, intentionally, and purposefully aware of these experiences and how they may affect the conduct of the remainder of the research, while also offering transparency to the audience regarding the researcher's experience, history, and investment regarding the topic.

ing the research. An autoethnographic approach affords the the ability to cross the boundary between the researcher and research participant and to intersect those experiences. Further, autoethnography provides the researcher with the facility to engage directly in the power and agency of contribution to the qualitative representation of a marginalized group (Davila, 2014) while also garnering transparency to reduce biases by allowing the reader to see the connections of the researcher to the research (Shufutinsky, 2019). Thus, the researcher reveals personal experiences, stories, emotions, beliefs, and thoughts on the topic, pressing the need to be mindfully, intentionally, and purposefully aware of these experiences (Creswell, 2013) and how they may affect the conduct of the

a data set of the researcher's reflections on the act of performing the research. Researchers can record their thoughts, ideas, beliefs, and their responses or feelings with regard to the interviews, interview responses, researcher-participant interactions, and any emotional toll that the research may be having (Janesick, 1999; Shufutinsky, 2019). Likewise, journals can be used by study participants, depending on the type of study, to reflect on their *self*, possibly refining their feelings, thoughts, perceptions, ideas, and their responses to the study (Janesick, 1999; Malacrida, 2007). Journal entries can take place during the conduct of the live interviews, but can also be performed periodically during the entire research process, at any time when the researcher, or the participant, has

a thought or an emotional spark related to the research. Some researchers choose to have a regular journaling periodicity, using their *self* in reflection at the beginning and end of each day, for example (Shufutinsky, 2019), to record their current antenarrative each day for a thorough understanding of their mental and emotional state during the deeper analytical process. These journal entries can be used for bracketing, to remove or to make these *self* responses transparent. When the researcher is performing transcription, review, or analysis, the journal entries can be useful to return the researcher into the setting, emotion, tone, and understanding of the data as it was at the time the interview or observation transpired. Furthermore, entries may offer additional opportunity for data triangulation, potentially including the comparison of the researcher interpretations to those of the participants where journals were kept by both (Janesick, 1999).

Likewise, memoing is performed during the course of the research interactions, during which the researcher's *self* is used for logistical purposes to document any thoughts, ideas, questions, concerns, or needs for expansion or follow-on questions that arise during the observation or the interview, as well as to identify any potential themes arising from participants' statements (Creswell, 2013; Shufutinsky, 2019). In memos, the researchers use the *self* by writing notes to their selves or to co-researchers regarding concepts and themes that arise in thought during the interview or observations process (Bryman, 2016). Also, similar to journaling, memoing serves as a means of bracketing, ensuring that any thoughts or ideas that may have, in the moment of the research interactions, been assumptions or presuppositions during interviews are denoted and recorded for later analysis and reflection. Memos are thereafter read and reflected upon for the purpose of accuracy, idea discovery, further exploration, and setting aside of *self*-perceptions and pre-suppositions (Shufutinsky, 2019). Thus, although both journaling and memoing are performed for related but different purposes, they are undoubtedly complementary methods of *use-of-self*.

Self-Exclusion. A vital practice in *use-of-self* is knowing when to withdraw or exclude oneself from conversation or participation. Having a thorough understanding of how one's own experience can affect the process of work or interactional dynamics can be critical to achieving objectives. This is the case in research as well, and although self-transparency provides the researcher and the audience the opportunity to understand the researcher's position and to evaluate potential effects on the research methods or outcomes, the use of *self* for exclusion of self from the data may contribute to transparency and trustworthiness. In qualitative inquiry, this can be done by removing the researcher's voice from the data, focusing on the essence of the experiences of research participants. Examples of this include using transcendental, non-interpretive approaches to data reporting (Creswell, 2013; Moustakas, 1994).

In order to be as thorough with the essential accounts of the participants, and exclude the *self* from the participants' stories, the author can use transcendental phenomenology over hermeneutic or other interpretive methods, meant to provide the comprehensive lived experiences of the study population, excluding interpretation (Giorgi, 2009; Moustakas, 1994). Furthermore, a transcendental approach can be taken in narrative research through verbatim restorying.

Verbatim restorying provides participants' narratives re-told using their own words. An example of this is the Terryan approach (Shufutinsky, 2019; Terry, 1984) in which the participants' collected narrative data are edited for thematic chronology, clarity, and relevance, but are told from the perspectives of the research participants, in their exact words, with no interpretive commentary or researcher voice in the narrative manuscript (Shufutinsky, 2019). This approach captures the phenomena of research study participants as close to their personal experiences as possible.

Self-exclusion is used to ensure accurate reporting of the essence of lived experiences of the study populations. These methods can thereafter be combined with interpretive methods, in a triangulated research approach, to benefit from

theoretical methods while simultaneously ensuring transparency of the researcher's interpretation (Shufutinsky, 2019).

Reflexivity in Research. Reflexivity is a philosophically-driven methodology of self-reflection and introspection with critical examination of one's own beliefs and assumptions and how they are constitutive of the social world in which one is located, including the manner in which that affects interactions and relationships with the people and content under study (Bryman, 2016; Lynch, 2000). Reflexivity in research can be practiced through mindfulness, meditation, presencing, and self-reflection techniques (Nagata, 2006).

Mindfulness is a present-focused awareness, attentive and open toward ongoing events and experiences (Bishop, Lau, Shapiro, Carlson, Anderson, Carmody, et al., 2004), and one's own interaction with them. Evidence shows positive influences of mindfulness on broad psychological functions, including cognitive flexibility and improved attention (Brown, Ryan, & Creswell, 2007; Moore & Malinowski, 2009). Mindfulness presents itself as a way to enable individuals to respond to their external environments more effectively (Weick & Sutcliffe, 2001), allowing researchers to have better sustained awareness of their research, their participants, and their own involvement. Being present as a self-aware person means being able to reflect on and learn from personal behaviors, thoughts, and actions, and to be able to monitor one's own behaviors in real-time, almost like observing the self in the current moment from above. Consciously monitoring and reacting to one's own moment-to-moment being is referred to as presencing (Senge et al., 2004). Using *self* in this form can be important to practically any professional role, and can be used not only for focus, but also for diagnostic purposes (Jamieson et al., 2010; McCormick & White, 2000), including diagnosing internal emotional reactions, initial perceptions, and understanding own biases. Because the researcher must be constantly aware of and understand internal perceptions and potential biases, mindfulness, presencing, and paying attention on purpose to

self-interaction in the present moment are critical as they drive conscious intentionality to execute whatever task is presented.

Self-reflection methods can be used at varying periodicities, such as prior to and post data collection and analysis, while re-reading data and interpretations, and during writing and reporting, thus submerging honestly into the *self* to understand personal beliefs, ideas, and values with reference to the research work done during that particular period, and acting intentionally, with conscious presence, to distinguish between essence and interpretation, and whether disparity exists (Jamieson et al., 2010; Lemon, 2017; Louchakova, 2005; Shufutinsky, 2019). Another way of arriving at a state of *self-reflection* is through meditation. Meditation can be used as a means of clearing the mind, placing the researcher in deeper self-reflection and allowing the use of the whole being for mindfulness and reflexivity (Puente & Bender, 2015).

Partnering and Mirroring. Another way that researchers can use *self* to prevent confirmation bias is through partnering. This methodology requires recruiting the use of partners, such as faculty members, co-researchers, and other colleagues to serve as code checkers, enrolling them as objective sets of eyes and minds in order to secondarily analyze and code the raw data (Poggenpoel & Myburgh, 2005). This independent coding, separate from one another, explores differences in perception and interpretation. Furthermore, the practice of mirroring can be used in this process of data analysis, enlisting other researchers and professionals to check the coding that has been performed by the study researchers and to provide feedback regarding how they externally perceive the coding and sorting performed by the researchers, and potentially provide alternate meanings and authentic observations regarding researcher interaction with the data, providing the researchers with options for reviews of their initial coding and opportunities to re-code data as necessary (Cho & Trent, 2006). This provides the perceptions, perspectives, and understandings, by external sources, that can surface any potential

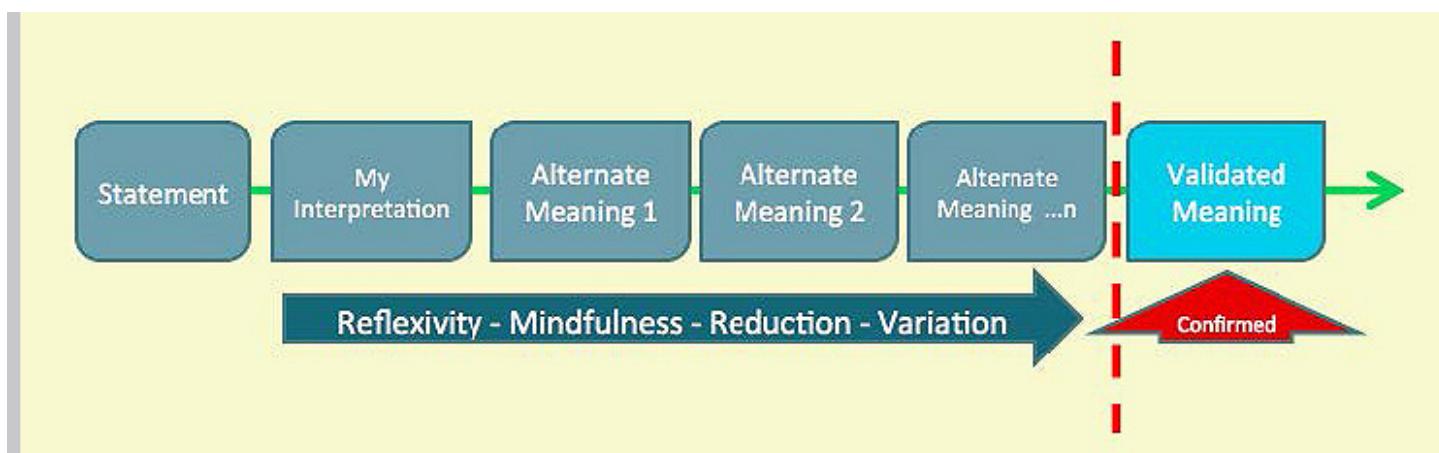


Figure 2. TRAAM Method Model (Shufutinsky, 2019).

concerns or issues of presupposition-driven biases. Furthermore, these individuals will have varying antenarratives, thus offering a possibility for triangulation of the potential meanings from the different parties. This means that, in trying to finalize the analyses of the data, the interpretations by different individuals, including all of the researchers, regarding informant terms and passages, can be addressed through mutual engagement and discussion between researchers and partners, developing understandings of differing and consensual interpretations and reconciling the coded data (Gioia et al., 2012).

Nevertheless, researchers are still the main instruments in the study and inappropriate interpretation can still skew research outcomes. Therefore, outcome verification and validation are important, and outcome validation sessions can be held with research participants in order to verify the accuracy of the depictions of the narratives or experiential phenomena reported. Validation and verification can be coupled with reflective verification methods, such as the tabular reflection and analysis of alternate meanings (TRAAM) method.

TRAAM. The tabular reflection and analysis of alternate meanings is a method of data verification designed in order to deeply examine potential misinterpretations of interview statements with the emphasis on comparing interpretations to potential meanings and validating them. It is not a trivial exercise to disassociate the mind from previously held assumptions and experiences and withhold decisions about the validity of the new phenomena

(Butler, 2016) until verified by study participants. Therefore, the researcher's experiences, emotions, and thoughts cannot be completely removed from the study, and in many cases should not, as certain types of qualitative studies are also focused on the interactions with and interpretations of the researchers. However, personal experiences can be purposefully identified and set aside so that the experiences of the research participants are at the center of the phenomena or process illustrations (Creswell, 2013; Giorgi, 2009; Husserl, 1943, 1970).

Because it is not uncommon for researchers to bring presuppositions into their qualitative research, it is critical that they are able to recognize those potentials for bias and take steps to abate or minimize interpretive biases. Thus, interpretive methods should be supplemented by some form of logistic self-separation, establishing boundaries, even if figurative, between self and research data. TRAAM is a novel method that can be used in order to aid the researcher in organizing the bracketing process for data analysis and interpretation, also adding rigor to the qualitative research and providing an increased transparency of data analytics, furthering the exhibition of qualitative study validity (Shufutinsky, 2019). This method creates a system for personal variation, and analysis of variation (Figure 2) for the researcher, driving the collected research data towards validation through study subject verification. In this methodology, the researcher uses critical thought and self-analysis to identify vital and meaningful statements in the participant responses or narratives, post data collection. The statements are applied in a TRAAM table for the researcher's

reflective analysis. In order to make sense and ensure that the correct context is being analyzed and reported, the author uses consecutive columns in a table, drawn from the process in Figure 2, to consider potential alternate meanings for the statements, adding alternate meanings in the subsequent columns. The meanings of the statements are verified with the participants during follow-on interviews as part of the interview framework. Thus, this method is applied to aid the researcher in validating the essence of the statements, making better sense of the accounts by ensuring the intended nature of interview responses and minimizing self-driven biases in the coding, conceptualizing, and theming processes (Shufutinsky, 2019).

Conclusion

Organizational research is conducted by OD scholar-practitioners for a variety of reasons, including completing academic degrees, for peer-reviewed publications, or during action research as internal or external consultants, ultimately generating knowledge or action. These social and behavioral science organizational studies often employ qualitative research methods in order to collect rich data. Nonetheless, qualitative research continues to receive criticism that questions methodological validity, trustworthiness, rigor, and credibility, much of it due to the interpretivist nature of the bulk of qualitative inquiry methods, and the perception of rampant research bias. There have been qualitative inquiry methodologies, data analysis structures, and models developed over several decades that have served to bolster

the rigor of qualitative inquiry. This article describes supplements to these models by detailing *use-of-self* tools and instruments which permit the conscious holistic use of the whole person and consciousness to intentionally and purposefully impact researchers' awareness and bracketing when undertaking organizational research studies. These tools, such as (a) eclipsic self-bracketing, (b) self-transparency, (c) self-exclusion, and (d) reflexivity, among others, are epoche approaches that, when used effectively, promote the abatement of confirmation bias. Additionally, methods such as code-checking, mirroring, and TRAAM are described as practical *use-of-self* tools for data and outcomes validation and verification. The additive or comprehensive uses of these tools and instruments can foster increased rigor and transparency around the research, increasing confidence, trustworthiness, and credibility surrounding research design, data collection, data analysis, findings, and qualitative interpretations. OD scholar-practitioner researchers should become adept at using these *use-of-self* techniques to improve research outcomes and their credibility as practitioners and researchers.

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If We Had Only Known

Experiences from Use of Self Educators

By John L. Bennett and
Heather Berthoud

Every day we use our “self”. How did we learn to do this consciously? And, how can we teach others to be more aware of their “self” and be more intentional and effective in their Use of Self? For several decades we have both been exploring these questions in our own lives, through our work as coaches, consultants, facilitators, teachers, family members, friends, and community members.

Our goal is to share some of the experiences and lessons learned in our journey to help others gain awareness, develop capacities, apply, and continue to develop their Use of Self in the context of their professional work. Many of our insights are drawn from experiences teaching graduate courses in the Use of Self in professional practice as well as interpersonal and group dynamics. We will explore three key frameworks that we use to teach Use of Self and the process we use to manage awareness and capacities at multiple levels of systems—individual, interpersonal, group member, and group as a whole. We recognize that learning and development do not end when an educational program ends, and we offer our methods to encourage an appetite for ongoing development. We conclude with challenges and opportunities for the work ahead.

Miller (1976), referring to the distinctions William James made “knowing about” and “knowing of acquaintance”, notes that “knowing about” is about the acquisition of readily existing knowledge and involves intellectual or cognitive processes whereas, “knowing of acquaintance” is learning from experience starting with

oneself. As a prerequisite for knowing more about the roles and relationships in which one is involved and about managing oneself in them, one must learn more about oneself. Philosophies and wisdom traditions through the ages and across continents have been built on describing the animating force that universally and particularly describes human beings.

Saint Augustine discovered interiority as a philosophical principle through his reading of books by Platonist disciples in which the quest to “know thy self” were so prominent. With “know thyself”, Aristotle recognized a distinction between action and the motivating forces of the actor. Whether through reason and/or will, people can direct their actions by developing consciousness of their intentions, motivations, and capacity. Similarly, Asian wisdom examines interiority through contemplative practices, which map self-development to discover the causes of human behavior and collective social conditions. Critically, all traditions are centered on the ability of the individual to be effective in the social circumstances of the age. That is, Use-of-Self is not a mere indulgence; it is an understanding of self, so that self can be deployed most effectively in contexts, whether interpersonal, group, or organizational.

“ . . . *Use of Self* is knowing and deploying all aspects of our personhood (cognitive, emotional, behavioral, and spiritual) and applying that knowledge. Expanding Use of Self comes from self-awareness, reflection, continuous learning, and feedback, all of which serve to hone and expand

our mastery” (Berthoud and Bennett, 2020). An expanded and fluid Self that sees, feels, knows, and can act appropriately in a given situation is what makes us effective in multiple contexts (Jamieson, Auron, and Shechtman, 2010). When talking about Self as an instrument, Tannenbaum and Hanna (1985) described Use of Self as social sensitivity and action flexibility. More than a mere technique, Use of Self is an approach to the practice of OD and leadership that emanates from, and is rooted in, the core of the person. This assertion suggests that the OD professionals and OD-oriented leaders and managers must be grounded in a mature and realistic sense of Self in order to appropriately judge a situation and their response to it. Use of Self manifests in several ways:

- » how we look, talk, and present ourselves;
- » the invisible parts of ourselves and our personalities, such as attitudes, values, motivations, biases, fears, assumptions, anxieties, feelings, habits, self-esteem, intuition, and hidden selves;
- » the actions we take;
- » the decisions we make;
- » the choices we pursue; our styles and preferences; and
- » the strengths, experiences, intelligences, knowledge, and skills we bring to each situation.

Use of Self is further influenced by many factors, including social identities (e.g., age, ethnicity, gender, national culture, sexuality, etc.), life and family histories, intentions, personal agency, self-efficacy, and levels of consciousness, self-awareness, and defensiveness (Jamieson, Auron, and Shechtman, 2010). Therefore, as Leary (2004) suggests, “the self is at once our greatest ally and our fiercest enemy, and many of the biggest struggles that people face in life are directly or indirectly the doing of the self” (p. 186). For OD practitioners, Use of Self means being aware of Self, attentive to the needs of others, mindful of context, and in service of mutual good. And, Use of Self for leaders is essential for deploying a full range of capacities and achieving desired results in a particular role.

Use of Self is particular and all encompassing. Mastery of it creates a paradox, because it calls for awareness and knowledge of a Self that is infinite in its possibilities, while finite in its realization. To realize individual potential, we must recognize the role the Self plays in fulfilling it. The expanding ability to see Self and to make choices is the ongoing work of the OD practitioner and leader. Therefore, “. . . by paying close attention to what is going on inside us and clearly perceiving the limitless world beyond our Self, we can substantially increase our own capacity to contribute to the common good while engaging in the process of individuation and self-differentiation—the unfolding of our unique Selves over the course of our lifetime” (Seashore, Mattare, Shawver, and Thompson, 2004, p. 56).

Evolving Frameworks for Teaching Use of Self

Kolb and Kolb (2005) assert that human development is substantially determined by learning and how individuals learn directs their personal development. Fenwick (2003) writes about the nature of experience and learning from and through experience. She notes different dimensions of experience, including those in which there is an immediate encounter in the here-and-now, whether planned or unplanned, those in which one learns by listening to and reading about the experiences of others and imagines themselves in that encounter. Other types of experiences are simulated, relived, experiences recalled, collaborative experience, and introspective experience. In our teaching, we rely on all of these modes of experience in addition to kinesthetic engagement such as dance or other embodied action. Because Self is necessarily about interiority, each student’s response is unique, to the experience and whether it is even registered as experience, and then to the meaning that is derived from experience. Furthermore, Self exists in, affects, and responds to all levels of system—individual, interpersonal, group member, and group as a whole—so as teachers we must also be aware of all levels in

order to support student awareness and development.

At the same time, because teaching Use of Self is necessarily done experientially, and is about bringing into awareness what is out of awareness, participants can be surprised, sometimes uncomfortably, when confronted by their unknown and/or disowned aspects of self. Yet such work is essential to expand the affective and behavioral range and develop the agility needed for varied situations (Jamieson, Auron, and Shechtman, 2010; Rainey and Jones, 2014; Seashore, et al., 2004). Without such exploration and discovery, practitioners and leaders are limited to their myopic view of circumstances and possible responses. Furthermore, they are less likely to understand the potential range of perspectives and, therefore, responses available to them. Without knowing their own animating forces and fears as such, they may not even know that they are acting out of circumscribed understanding.

One challenge for the student, and for us as teachers, initially, was the seemingly random nature of experience and available lessons. Over time, we have evolved to rely on a few foundational models that guide both students and instructors through ever expanding application of Use of Self. Using those basic models, we can provide opportunities for students to experience and become aware of self at simple to complex levels of systems, i.e. individual to group while drawing on many frameworks, models, theories, and concepts that help illuminate the foundational models.

Many theories, models and frameworks related to human development, conflict, emotional intelligence, interpersonal and group dynamics explain the development and use of Self and are resources we draw on. As a way to organize learning of such a vast field, in our teaching, we use three specific models to frame the learning and development experience 1) Choice Awareness (Patwell and Seashore, 2006), 2) Change Mastery (Bennett and Bush, 2014), and 3) Reflective Practices (Brookfield, 1995; Johns, 2009; Schon, 1983, 1987). They form a base upon which all else can be built.

Choice Awareness Matrix

Patwell and Seashore (2006) define a framework for attribution of choices which they call the Choice Awareness Matrix. Individuals may attribute their choices for action, decision, inaction, and even emotion to themselves or others. These choices may be conscious or unconscious (aware or unaware). Choice attributed to others that is unaware, is called socialization, such as following the norms of a group, organization, or social culture. Automatic choices are attributed to the oneself without intentionality. Automatic actions include habit, routine, rote behavior without conscious decision or consideration of alternatives. Choices one is aware of and attributes to others are blame or praise, a giving over of responsibility for the action and its outcome. Accountability occurs when a person makes a conscious choice and attributes that choice to themselves. Through facilitated, experiential learning, we seek to help students move choices into the mode of accountability by helping them notice their attribution and consider their options, choices and impacts on themselves, others, and the group.

Change Mastery Model

Regardless of the capacity a student wishes to develop, such as face conflict with competence, listen effectively, present self with confidence, the change mastery model offers a map they can locate themselves on (Bennett and Bush, 2014). In order to make any change, one must first be aware of the behavior or habit of mind. Once awareness is raised, then the crucial step of accepting the desirability of change can occur. Without acceptance, there is no move towards adopting new behaviors, trying on new ways of being, seeing, or thinking. It is critical here that the person has support for what is usually an awkward stage of novice behavior. Despite a tendency to want to get things correct right-away, most people take time to integrate the new behavior into a more conscious competence. With continued practice and feedback,—adopted behavior is effortless and the person can be creative in its application—that is, mastery occurs.

Reflective Practices

Drawing on the work of Aristotle in *Nicomachean Ethics*, William James suggested “that there is a fundamental difference between knowing about, the product of reflection and abstract thought, and knowledge of acquaintance, which drives from the direct experience of situations” (Stein, 2004, p. 21). Learning and experience are interconnected. And, later, Kolb and Kolb (2005), among others, noted that learning is a cyclical and iterative process beginning with concrete experiences, observations and reflection on those experiences, development of a theory about those observations and reflections, and active experimentation focused on the practical implications of learning.

We see reflective practices like journaling, meditation, and discussion as essential for learning. By reflecting on internal experience and external events, including one’s impact, students learn to notice what is happening as it is happening and to notice their relationship to those events. They begin to notice their own patterns of response, and in a group setting, can see that others have different patterned responses to similar events. Continued curiosity allows for reflection on how those patterns develop, whether conditioned by social context and identity e.g. immigrant status, age, sexual identity, race, etc. or biography. And, once patterns and the purposes they serve are discovered, students can make conscious choices about the actions and thoughts they make next.

Our Integrated Approach

Each of these foundational models and practices is used to build students’ effectiveness at multiple levels of each system. We intentionally build opportunities for students to examine each level of system in turn and recursively. We know that higher levels of systems are harder for people to discern, especially when they are participants in them. By creating tight focus on a level of system for any given experience, we help direct students’ reflection. For example, a given experience, e.g. a conversation, structured activity, serendipitous

occurrence, can be reviewed using questions that focus on distinct levels of system such as:

- » Self
 - What do I notice about my physical sensations as I witnessed . . . ?
 - Under what circumstances am I likely to make similar choices? What other choices might exist? What would it take for me to make them?
- » Interpersonal
 - How do I interact with a person with a different style preference?
 - When am I attracted to/pulled back from someone else?
 - What is the dynamic between these two people? How does it come about?
- » Group member
 - When I did X, what impact did it have on the group?
 - What role do I play in the group? How is it useful? Not useful?
- » Group as a whole
 - What matters to the group as a whole?
 - How do you characterize the temperament of the group?
 - What behaviors would support improved group decision-making?

Critically, these reflections on the experience in the classroom, are examined as typical dynamics of organizational life. The thoughts, feelings, and behaviors that students experience in the classroom are not unique to that setting. Rather, they typify how these students in particular, and people in general, can present themselves in work and other settings. The interpersonal dynamics, group member roles and group culture are reflections of and proxies for groups and organizations participants contribute to and witness outside the course.

Encouraging Ongoing Learning

Though we teach Use of Self, we are clear that course completion does not signify mastery. In fact, it may only signify awareness or acceptance in some cases. We begin by establishing the courses and class sessions as moments in a lifetime. The

Table 1: *Examples of Responses*

	I Was	I Am	I Will
Self	• Blaming others • Unaware of my own power • Aware of my reactions, not my assumptions	• Testing assumptions • Beginning to see my power • See my assumptions and how they drive my automatic	• Continue noticing when I “leave” • See it without relying on others to show it to me. Own it. • Continue to explore
Self and Other	• Not sharing my reasoning and intent • Make sure all is presented well • Fear of emotion	• Aware of my behaviors • Engaging at a deeper level; explore my faults • Seeing that conflict allows relationship to grow	• Tell others my goal for sharing reasoning and intent and asking for feedback • Engage feelings; work with my feelings • Know when to jump in
Self in Group	• Want to be seen as mysterious. • Assume the group won’t/can’t accept me • Unclear about my impact	• Make mistakes and still included • Want to be in without losing self • Ways I act not always productive; lost in my need	• Be OK with making mistakes, and not sacrifice authenticity • Ask for and give support • Get clear about my needs and sense of the group
Group	• Unaware • Thought the group was the sum of the people • Thought I was on my own	• Beginning to see • Can name (some) system level dynamics • The group can hold space for me	• Act with the full group in mind • I can help us build a spider web of relationships

purpose of the moment is to set a direction, make the existence of a path known, to advance along the path, and whet the appetite for the journey of continued learning and development. Through descriptions of our own learning journeys and those of our mentors, we establish examples of life-long learning. Through recognizing even small changes in behavior, as in a well-timed or directly worded statement, a joining instead of ignoring a comment or person, we encourage the celebration of small victories, and the possibility of expanded and sustained success. The reflection of what will be done in the future, in the next encounter within the course and the next weeks, months, years, after the course, students are invited into a process that unfolds over decades, not just in the confines of a program.

We typically close courses and workshops on Use of Self with a reflection of where the students understand themselves 1) to have been when they entered the course, 2) where they are now, and 3) what they will do in the future. The construct

of the reflection is intended to reinforce the idea of a journey already begun, and that can evolve. We also reinforce all levels of system by asking for reflection at all levels. In *Table 1*, we provide examples of responses we have heard.

Challenges and Opportunities for the Future

As more attention is focused on developing Use of Self, the opportunities to learn and develop a body of knowledge abound. We have simply shared our experiences and learning. We encourage others to continue the work to document, research, and share ways to teach and learn about the use of one’s self. This work has decades, if not centuries, of historical experience, using various tools and ways of teaching aspects of the work, and a growing body of knowledge about the theory of Use of Self. Relatively little has been written to share best practices and learning about how to teach it. While there may never be—or should be—a single theoretical or practical

framework for Use of Self, it would be useful to see the work of scholars evolve into a set of theories of teaching approaches that can be studied, taught and practiced. Those engaging the development of Use of Self need an andragogy. This will allow those who are engaged in teaching—formally and informally—to identify, share and evolve a body of knowledge that extends beyond the “what” of Use of Self to the “how to teach” Use of Self. This will support best practices and evaluation of those practices for efficacy.

We need animators, as Boud and Miller (1996) refer to those who help people learn without formal teaching. Brookfield (1995) argues that learners’ experiences constitute a rich resource for problem-solving and suggests that a critical task for animators is to develop learners’ confidence in the usefulness of these experiences. This is contradictory to common expectations of learners, which is usually that the expert will teach them. Just as coaches and mentors can be developed, so can animators. And, finally, we must

develop ways assess learning and development of those who participate in educational experiences related to Use of Self.

Conclusion

Developing Use of Self as OD practitioners and leaders is an extensive undertaking, because it involves understanding and effectively using all aspects of ourselves to serve change in others, whether as individuals or larger systems. As practitioners and leaders, it is important not to focus on merely wielding techniques but to present the fullness of one's being in support of the continued development and use of Self. It is through that fullness of being that one has resonance with clients and colleagues to engender the confidence and trust needed to receive the techniques, and to learn, and recover should things not go according to plan. The more we can see the essence of our Self and understand our Self, the more we can support others in seeing their Selves. The greater our mastery of Use of Self, the greater the potential impact on the systems we are in. Regardless of how we view Self, there are multiple and overlapping ways to develop it towards mastery, provided we are intentional and diligent. Only then are we able to have the desired impact with individuals, groups, organizations, and even larger systems, if we choose.

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Summary of the Global Use of Self (UoS) Research Report

By Mee Yan Cheung-Judge
and David W. Jamieson

Introduction

Since 2017 until early 2020, we have been engaged in developing, executing, analyzing and writing about this, first ever, global study of UoS. In this article, we wish to share a summary of the report and what we found. There will be many more details available in the report which can be downloaded at the end of this summary. This UoS research report was launched in March, 2020.

Background

This research report is the result of over 2 years of effort. We started planning the research project in the summer of 2017 and launched the data collection in June of 2018 with the following intentions:

- » To ground the Use of Self theory/practice within research data so to move away from the vagueness and abstraction currently associated with the concept.
- » To learn about how global community of OD Practitioners think and act on this concept in their day to day practice.
- » To learn about what supports and hinders the practitioners' optimal use of themselves, and their perception on what are the strengths, weaknesses, and areas of further development within Use of Self
- » To explore what are developmental opportunities and pathways to support OD Practitioners to make better 'use of themselves'.

- » Inform the developers and educators around the globe about targeted learning processes that could be introduced and used to support the development of the next generation of OD professionals.

Demographics

A detailed description about how we distribute the questionnaire can be found in pages 12–13. The research data came from a total 704 respondents from 45 countries. The largest number of respondents came from the US with 236, followed by the UK with 200. The rest came from Singapore, China, Canada, South Africa, India, Netherlands, Philippines, and Australia, and other countries with single-digit numbers. (p. 14–15)

The respondent population was 62.4% female (430), 36% male (248), and 1.6% other (11). 15 answers were left blank, therefore removed, leaving us with the total number used in gender analysis of 689.

The racial/ethnicity answers by respondents revealed 54 unique identities.

Notably, the research population shows over half of the respondents have under 20 years of experience, with the rest having 20+ years of practice.

The educational data showed us that close to 60% of respondents have limited formal OD education (p. 18). There can be diverse factors affecting this, but one explanation is the limited formal education options outside of the United States (for the past 40 years) and the pattern of people

Table 1. *The Five Factors*

Factor Number	Name	Description
1	Using Cognitive and Emotional Skills with Courage to Serve Dynamic Systems	This factor captures most of what “others” see in ODP in a number of areas in their Use of Self. It highlights how respondents realize that when they use their cognitive abilities, in-depth knowledge of the trade, and skills through helping to provide understanding of the system; knowing how to position themselves; be adaptable in responses; seeing self, other, and an affiliative context, especially in interacting; and courageously using self to disrupt, stimulate, and challenge the system, others will then see Use of Self in action.
2	Attention to Relationship-Centric Values & Behavior	This factor focusses on how important interpersonal relationships are as part of our ODP work: having affiliative capabilities, demonstrating collaborative/partnering behaviors, proactively making emotional connections, and showing concern for the other’s well-being and being very conscious on how they show up.
3	Self-Management in Emerging Situations	This factor emphasizes the importance of self- management in the “here and now” moments, for example - maintaining boundaries, managing emotions, staying grounded and confident, keeping one’s own energies and focus sharp, believe in one’s abilities, being choiceful and intentional—all in service of the client.
4	Continuous Development of Self & Other Awareness	This factor captures the work and motivations involved with deepening our inner work, gaining awareness of self and others, working on unresolved issues, exploring less developed and shadow aspects of self, creating regular reflective practices, and finding ways to take care of one’s self.
5	Experiences of Best UoS Impact	This factor collects the types of experiences, feelings, and passions that are seen and felt within the practitioners when they are optimally using themselves, and by others around that are involved and being impacted.

joining the field of OD from other professions first (therefore not engaging in extensive formal OD training). OD has always been both a professional and personal field, which draws people interested in continuous development in the organizations they serve, as well as, their own growth.

The Research Instrument Development Summary

The questionnaire was constructed after a thorough literature search—from which we have derived 119 items which were organized into five sections for coherency. The five sections are:

1. Characteristics and Values (about you);
2. Continuous self-work (inner work, self-management habits, self-care);
3. Practice skills, abilities and competencies (cognitive, affiliative/emotional use, skills and execution competencies);
4. Life-Long Development Practices (intentional efforts to continuously improve areas listed about and the field of OD knowledge);

5. Experience of Use of self (impact on self and others when use of self is in optimal form).

We used a 5-point Likert scale to measure how well, *how much or how often* items within the survey were true for each respondent.

Qualitatively, we included seven open-ended questions, one of these questions invited the respondents to share their definition of Use of Self. While the remaining 6 questions explored deeper intricacies of the Use of Self concept and practices. The description of the structure of the survey can be found on p 12.

Summary of Quantitative Data

We performed an exploratory factor analysis to determine possible structures and correlations within the large amount of data. Further details describing the methodology are in the report (p. 20–21) We started with 119 scaled items and through our analysis, scaled down to 95 used in the

final factors. *Table 1* highlights our naming and descriptions of the five factors and their explanation. The five factors highlight the significant factors that affect how we show up in our work, while outlining what development work we may want to do to prepare ourselves for this type of complex systemic and interpersonal work. They reveal how Use of Self has both a front stage (how people experience our Use of Self) and a backstage (how we self-manage ourselves in various situations).

Factor 1 details the observations of those who see and experience our work, and therefore experience the results of our Use of Self in action. It outlines a mixture of knowledge, skills, discipline and courage needed to work in dynamic systems.

When ODPs focus on how they, through their competency and behavior turn their internal resources to serve the client in a way that can be seen, witnessed, and experienced by the system, effective results are more probable. The items in Factor 1 highlight the use of:

- » cognitive and emotional skills
- » thinking processes that help understanding and sense-making in dynamic systems
- » courageous choices with behavioral flexibility

Factor 2 describes how OD Practitioners often “earn the right” to help by putting themselves on the line to serve clients’ needs. When OD Practitioners possess client-focus attitudes, they enact behaviours that predispose them to treat their clients in a relationship centric way, demonstrating developing and supporting relationships as their top priority in their work. Through this approach, clients will experience their Use of Self in a personal way.

Factor 3 highlights the importance of self-management in the ‘here and now,’ especially in uncertain, dynamic and challenging situations. OD Practitioners understand they do not control how ‘living systems will react and behave when they begin intervening, hence, they never know what may emerge and whether any of the processes planned will work out as expected. So being able to practice presence, regardless of the emerging situation, through managing our emotions, especially anxiety and fear, and holding back our judgement while continuing to stick to the path is an important aspect in an OD Practitioners work.

Factor 4 emphasizes the importance of motivation to continuously deepen our inner-work, grow our self-awareness, understand the self-other-context in systems, and develop ourselves to execute masterfully.

Factor 5 details how the impact and outcomes of Use of Self are understood, both as experienced by OD Practitioners themselves, as well as, experienced by those being impacted by the ODP. This Factor begins to show what types of self-reported impacts an optimal Use of Self may produce.

The story was told by the 5 factors

Collectively the 5 Factors provide a way to assess one’s Use of Self, defining areas that are both relatively strong and areas of less development. An important note about the connectivity among the 5 Factors is that the first four factors support the ‘backstage’ work of practitioners in ensuring their optimal use of self is in action, which in turn produce what people in the systems and experience in OD.

The summaries below are statistically created based on the pattern of item-answers across all the respondents. Given the large number and the context of our respondent’s demographics (years in the field, various countries and educational endeavors, especially), the overall mean score for our sample (704) was 3.85 out of 5.00 which gave us confidence of both the significance and relationship between the 5 factors:

Factor 1 (Using Cognitive and Emotional Skills with Courage to Serve Dynamic Systems) **3.80**

Factor 2 (Attention to Relationship - Centric Values & Behaviours) **4.07**

Factor 3 (Self-Management in Emerging Situations) **3.75**

Factor 4 (Continuous Development of Self & Other Awareness) **3.85**

Factor 5 (Experiences of Best UoS Impact) **3.68**

It is also important to point out that the most significant factor is factor 2, it is our willingness to put relationship as our top work that will enable us to use our optimal self for results. This is followed by our commitment to continuously develop our self and other awareness that will support our relationship centric approach. This is followed closely by our trade knowledge as well as our emotional skills to serve the client within an ever-changing environment. All the above needs to be supported by our ability to have self-discipline and effective self-management habits to stay within the here and now regardless how challenging the context we are in. At the end, the research data show us that it’s unlikely to see the high impacts of factor 5 if all the other 4 factors are not high themselves.

These 5 significant factors describe what are the factors that marked the characteristics, behaviors and practices of those who are using their best self with impacts which practitioners experienced and witnessed among those whom they serve.

This type of data, especially the detail items that formulate each factor (p. 23–30) can be used by the individual OD practitioner to self-assess themselves as to what are the foundational strengths they possess, and what other aspects from this set of data they may need to take a closer look to or undertake some developmental actions.

Summary of Qualitative Data

As mentioned, there are 7 open ended questions in the survey instrument, and one of them asked the respondents to share their own definition of Use of Self, which by itself generates even more interesting definitions (see p. 38–42 and *Appendix E*). As for the other six qualitative questions, 8,232 data items were generated resulting in some of the most interesting data on the Use of Self which has ever been captured.

The six questions are:

- Q 132** What impacts do you personally feel your best use of self creates for others?
- Q 133** What barriers (from yourself) are most common in hindering your best use of self?
- Q 134** What barriers (from others or the situation) are most common in hindering your best use of self?
- Q 135** What top priorities you have in developing the effectiveness in your Use of self? and what type of development activities you deem as appropriate to support you in doing so?
- Q 136** What are some of the more regular activities you do to improve your use of self?
- Q 137** What self-care habits have you developed that help you to maintain your energy, focus and sharpness?

The analysis of the qualitative data was a labor-intensive process with all questions, except Q 137, analyzed by two separate individuals—to ensure that the data results presented in this report were compared and collated, with two perspectives, prior to being reported. *Appendix D* contains details of the methods used in this process.

We will briefly summarize the key themes that emerged from each of the 6 questions, with all the detail analysis in the report. However we will give our integrated analysis at the end of this paper.

(Q 133) What barriers (from yourself) do you think are most common in hindering your best use of self? There are total 863 data points from respondents, and they are organized in 7 themes.

1. “Lack of self-confidence, self-doubt, and fear” (269 items)
2. “Personality and style” (151 items)
3. “My “SELF” in the way” (130 items)
4. “Overcommitment and lack of self-care; lack of time for reflection and development” (114 items)
5. “Practice issues that stop my use of self being effective” (106 items)
6. “External situation that bring out the worst in me” (44 items)
7. Data items related to internal consultants. (20 items)

(Q 134) What external barriers (situational from others and the context) do you think are most common in hindering your best Use of Self? Respondents gave 811 answer items and they are organized into six themes.

1. Data items counted as relating to “self” that are barriers to Use of Self (238 items)
2. Data items counted as “others”—people (clients, colleagues, partners) attributes and behavior that are barriers to one’s own Use of Self. (237 items)
3. Data items counted the “environment” (the context in which they work) produce barriers to their best Use of Self. (196 items)
4. Data items counted as “misalignment of focus and expectations between practitioners and organizations” (57 items)

5. Data items counted as the “challenges about being an internal practitioner” (44 items)
6. 30 statements on “my best Use of Self should not have been affected by external barriers”
7. Unassigned items (9).

(Q 135): What are the top priorities you have in developing the effectiveness in your Use of self? And, what type of development activities may be appropriate to support you in doing so? This question generated a total of 1479 items, but in the data analysis we separate the question into two parts: (1) what are their top priorities; and (2) what appropriate developmental activities to support them in delivering their priorities.

Part I: we focus first on the listing of the respondents’ “top priorities”. From the 577 items, eight priorities were extracted.

1. Deepening my self-awareness (understanding of self, values and vision work) (156 items)
2. Deepening my understanding of self, others, relating in specific context (working on unconscious bias, increase understanding of diversity, being humbler and learning to build trust and relationship) (103 items)
3. Developing better self-management—more patience, match pace to others, less judgmental (95 items)
4. Improving self-care (work life balance, not too many projects, more re-energizing activities, have more self-compassion and self-forgiveness) (66 items)
5. Needing to work on my unresolved issues (57 items)
6. Needing to increase my confidence, greater courage in intervening, greater sense of groundedness (40 items)
7. Doing more to improve physical and emotional wellbeing (yoga, Alexander technique, music and dance, physical exercise) (35 items)
8. Getting to know the context I work in (23 items)

Part II of Q135: What type of development activities may be appropriate to support you

in doing so? 8 themes are extracted from a total of 902 items.

1. Engaging in reflective practice (journaling, reflective practice, reflection before and after intervention . . .) (170 items)
2. Receiving coaching, supervision and peer support (group supervision, mentoring, peer support and exchange) (123 items)
3. Seeking feedback (from clients, colleagues) (110 items)
4. Finding opportunities to have more practice and more experimentation to increase confidence in my practice (108 items)
5. Continuous learning to develop myself (reading, develop better skills, up to date with latest research . . .) (102 items)
6. Spiritual Practice (go on retreat, more meditation, mindfulness reflection and journaling, and other spiritual practice) (101 items)
7. Attending more formal developmental program and workshops (getting Master and PhD, and other workshops that will sharpen my practices) (66 items)
8. Attending conferences and other networks that support me (learn theories and tools, and specific technique) (65 items)
9. Unassigned items (57)

(Q 136) What are some of the more regular activities you do to improve your use of self? (14 themes are extracted from 1767 items)

1. Reflective Activities (326 items)
2. Debriefing/Feedback/Reflection with others (230 items)
3. Attending Workshops, developmental events, conferences to engage in continuous learning (222 items)
4. Continuous learning (212 items)
5. Spiritual Practice/Mindfulness/Meditation (182 items)
6. Action Learning/coaching/supervision (145 items)
7. Self-care (physical, emotional, and general wellbeing) (123 items)
8. Doing re-energizing/nourishing things to re-charge (74 items)
9. Practicing Intentionality (65 items)
10. Extending scope/challenging self to take (46 items)

11. Therapy (40 items)
12. Practice, Practice, and Practice (34 items)
13. Networking (28 items)
14. Never thought about this Question (16 items)
15. Unassigned items (24)

There is a summary table (p.58, table 24)—pulling all the different types of developmental practices/activities together from Q135 and 136 which shows the top 5 types of developmental activities the respondents to this questionnaire engage in, which has both coaching, mentoring and self-development implications.

(Q 137) What self-care habits have you developed that help you to maintain your energy, focus and sharpness? 2499 items are extracted from the answers to this question which are clustered into nine themes. Due to the vast number of the items, the reporting of this question was different. See p. 59–63.

1. Put priorities to maintain my physical wellbeing
2. Leading a more contemplative and reflective life
3. Recreation - Doing fun and energizing things
4. Take more time to engage in social time and connection with others
5. Be “Time-Rich” to restore and enrich self
6. Planning/structuring my approach to work—proactively prevent stress
7. Keep learning and growing
8. Building positivity
9. Connection with community
10. Others

(Q 132): What impacts do you personally feel your best use of self creates for others? This question generated 813 items which are organized into 9 themes.

It is important to note that it is not easy to organize the data from this question because conceptually the items are very similar, and it is difficult to make clear distinction. Also, the labelling of the themes is prone to more subjectivity than any of the other 5 questions. Finally, 120 items are the

respondents’ own definition of use of self when they see themselves in action.

1. Provide Safety and Spaciousness for others to do their work (148 items)
2. People become bigger and have more confidence (135 items)
3. People become more self-aware and become more open (64 items)
4. Understanding of self and others were improved with better relationship and conversation outcome. (84 items)
5. People are able to see better, generate new perspectives, and increase hope (98 items)
6. People are able to take action to shift self/others/environment (89 items)
7. The work is able to impact the system (49 items)
8. Respondents reflect their definition of Use of Self when in action (120 items)
9. How does “Use of Self” impact the practitioners (14 items)
10. Unassigned (12 items)

Summary of the Qualitative Analysis

The qualitative data offers multiple insights about Use of Self.

1. Firstly, it shows that even an articulate and clear understanding of the Use of Self concept does not automatically translate into one’s optimal Use of Self.
2. The data reveals the challenges OD Practitioners face when trying to be their best Use of Self are both internal and external. Tensions of wanting to do one’s best to serve the clients when working in environments that are complex and changing all the time is difficult to navigate. The data about external barriers to Use of Self practice confirms that the workplace, for most of the respondents, is often a very stressful environment with leaders and colleagues working out their stress on each other and to those who are supposed to support them. On top of that, the combination of misalignment between what needs to happen, and what leaders perceive needs to happen often puts OD Practitioners in a hard place, e.g. the difficulties of reaching leaders for clear commissions, the challenges of colleagues who are losing

part of their relational civility, and their reluctance to working collaboratively.

3. 64% of the data shows us the key internal barriers are lack of confidence, fear, uncertainty about how to leverage one’s personality, and how to manage one’s default orientation towards people. Many admit that they are holding certain attitude towards people which make them ineffective in their practice. The combination of—even occasional—senses of shame, stuckness, fatigue, and inability to rise above these barriers—are not good for our long-term well-being. So, we need to encourage each other to work through these barriers to stay potent in our work.
4. Also, respondents are aware that a lack of self-care and lack of time for reflection cuts into their sharpness in practice. When they are not in top form, they often succumb to those external situations and types of challenging people who trigger them. If such triggers and sensations are not managed properly, it prevents OD Practitioners from being their optimal self.

Having said that, should OD Practitioners, who are called to support a living system, be more robust and confident about who they are, freeing up more capacity to focus on the support work at hand? The purist answer is YES. But what do they need to do to find that confidence and become the sharpest tool and support instrument? The qualitative data offers some advice.

As we end the qualitative data analysis, we were struck by the level of honesty and dissatisfaction practitioners have shared in answering these questions—there are real struggles, wanting to be the best for the clients, yet the nature of OD work constantly demands them to know what they should do, yet because of being human, such work is not really doable, at least not all the time. The sense of shame and guilt seeped out from the data.

We notice that respondents to Q135 and Q136 clearly identified the developmental priorities they want to have. Developing their self-awareness was the top priority, followed by developing a deeper understanding of people (others) while

The full report can be downloaded in any of the following three links.

<https://www.quality-equality.com/uosreport>

<https://drive.google.com/file/d/19sn5oRMYaehBk5fgLyY95DYobHNCpT7R/view?usp=sharing>

<https://drive.google.com/file/d/1m1Cl2DA4zISKLcezoSfTy2hQCIERPQif/view?usp=sharing>

building tolerance and trust among those they serve. The third priority is to increase self-management to navigate the ever-challenging world while developing greater acceptance, tolerance, patience, all with less judgment of others. The interaction of these three priorities will definitely help OD Practitioners overcome a range of their internal and external barriers. Prioritizing one's development, coupled with being willing to work on unresolved issues, improving self-care habits and taking strides to improve self-confidence, is critical to optimizing one's Use of Self.

OD work by nature is challenging. In order to use one's self to constantly capture data, observe what is going on at multiple levels of a system, make intentional choices as to what to do, and not have the certainty about the outcome of any intervention, we will need to be savvy with an applied behavioral science lens, a brave heart, and self confidence that, regardless of the challenges of external environment, there are sufficient resources in our inner being to enable us to function well in these contexts. Hence self-care is no longer a luxurious option.

It is heartwarming and encouraging to see the long list of developmental activities the respondents said they are currently (or aspire to) doing to keep themselves sharp. If receiving coaching, supervision, peer support, and seeking feedback were collated into a category, that category would rank as the top developmental activity. The next priority is engaging in reflective practice. We are pleased to see spiritual and contemplative practices also ranking high in this data. The remainder of data points include seeking more practice experience and more formal and informal developmental activities. If OD Practitioners can link their priorities of development with the right type of developmental activities, we will all be operating at the edge with much less burn out.

This leads us to the question about self-care which received close to 2,500 statements. From the large number of responses, we can safely assume

respondents are beginning to take self-care more seriously as they realize doing this type of OD work requires regular refueling, re-energizing, and replenishing.

As we have said, OD work by nature is challenging. In order to use one's self

to constantly capture data, observe what is going on at multiple levels of a system, make intentional choices as to what to do, and not have the certainty about the outcome of any intervention, we will need to be savvy with an applied behavioral science lens, a brave heart, and self confidence that, regardless of the challenges of external environment, there are sufficient resources in our inner being to enable us to function well in these contexts. Hence self-care is no longer a luxurious option.

The final data set about the impact on Use of Self was very inspiring to analyze. Respondents know when their self shows up and they do a great piece of work—using their instrumentality to affect the system, they can see that people feel safe and they become bigger, more confident, more self-aware, and become more open to collaborate with others. Conversation becomes more generative and new perspectives emerge. Respondents also reported

people feel more ready to take action to shift the situation they are stuck in and feel they can create more impact within the system. When practitioners see the fruits of them “selves” working well, they become contented, satisfied, and happy, knowing that they can partake in these human situations with positive impact.

It is through this last question on impact that we begin to develop a sense of causality between the best use of oneself and the impact on the system and the people within it.

The qualitative data generated a lot of food for thought. We want to encourage developers, educators, supervisors, and mentors to think about the implications for what they have to offer to OD Practitioners themselves. As for ODP's, the data shows that it is worthwhile for us to continue to pursue a life-long journey of sharpening our instrumentality and have a deeper understanding of who we are in service of the clients? By perfecting ourselves we become more than a helper, we become ambassadors for relational civility in the workplace, community, and society? And to sustain situations that will continue to support human potential to do well? As we do this work, we are asked to do our own work. No other profession will grant such luxurious opportunities and outcomes.

Conclusion

This piece of research and the report has been the result of 2.5 years, amid serious illness and other types of obstacles. But we feel incredible privilege and grateful for being given life to finish this report and get it into your hands. We believe the results have enough data for the readers to draw their own conclusions about the role of Use of Self in our practice. For us, the picture presented by the data gives a coherent pathway for all of us, as scholar-practitioners

to build our optimal use of ourselves more effectively and help others develop this essential mind- and skillset.

We like to sum up the implications that OD practitioners may want to consider:

- a. Understand how core Use of Self is for all we do in our work and lives
- b. Dedicate more time to learning. Especially, filling in any gaps in knowledge or skills, practice as a development tool, pursue and use feedback, participate in personal coaching, individual supervision, group supervision, and use a personal social system to have support, challenge, and caring.
- c. Understand our own strengths and less developed areas. What do we accept about ourselves and what do we deny? What are the responses telling us about us?
- d. Change our self-messaging. We all have narratives we have learned and tell ourselves regularly, even when they are not accurate. Change our self-talk to guide new narratives.
- e. Pay attention to those internal barriers—whatever they are, as well as personal triggers and hooks that generate our reactive selves? Observe in what ways do we lose our control or emotional stability? We know we can always do more work to understand, manage and/or eliminate these aspects of our behaviour.
- f. Use the 9 clusters from the literature search to reflect on your development.

There are other key messages for those who educate and develop OD Practitioners which can be found in the Report (p. 72–73).

May we thank the respondents again for your effort, and the readers for you to take interest in this subject. All the best to all of you.

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“As each of us plays his/her own small role in this profession, I say once again—as I’ve said often in speaking and in writing—that the principle instrument that we have to use in this field is ourselves.”

FROM THE ARCHIVES

“Of Time and the River”

An Excerpt

By Robert Tannenbaum

This article originally appeared in *OD Practitioner*, Vol. 11, No. 1, March, 1979

This is an excerpt from the edited version of the keynote address before the OD Network Meeting, Portland, Oregon, October, 1978.—Ed.

As one of a few key founders in OD who advocated, taught and mentored the rest of us in use of self thinking and practices, Bob Tannenbaum would be very happy with where we are today in writing, research, and understanding of use of self and a special issue like this one.

My next theme is again one which troubles me considerably in our field: the strong lure to many of us of techniques and methods.

As the years have been passing, and particularly during the past few years, the trend has been in the direction of an increasing emphasis on techniques and methods in OD. As do many of you, I frequently work with interns—people new to the field. While doing so, I often find it difficult to deal with anything central in the field before I am confronted with the question, “Do you know a technique for implementing that? What method will work here?”

Individuals are constantly reaching out for “tool kits,” rather than for something more basic. Now, tool kits are essential. I don’t want to imply by what I say that a practitioner in our field should not know of and be skillful with a wide spectrum of techniques and methods. But to me the issue is when and how and with whom we choose to apply these techniques and methods. The narrow adherence to the tool kit by many in our field does trouble me deeply, for it is dehumanizing OD. If I were to characterize OD at

present, I would say that it is less humanistic than it was a few years ago; and I am concerned that the trend is in the direction of even less humanism. People are becoming less important to us, less central than issues such as, “Can I run this kind of an exercise?” or “What is the latest method being used?” As practitioners, we are often so afraid of being ourselves that we need techniques, methods, and a handy tool kit to fall back on to give us some security and support so that we don’t have to face ourselves as professionals and as human beings.

A few months ago I received a questionnaire from a group of researchers who were looking at OD in a certain class of organization (for example, education, industry, health.—I’m going to be a bit ambiguous in talking about this in order to provide anonymity.) The research used the Delphi technique, which involves a series of questionnaires through time where the data from one questionnaire is used in the second, and the data from the second in the third.

For the first questionnaire, 50 respondents were chosen—25 well-known OD specialists in the country and 25 well-known internal OD people in this particular class of organization. The people were asked to indicate from a long list of OD techniques and methods which ones they would use if they were to do an OD project in a unit in this particular field. I am told by the researchers—and I’ve had a couple of phone conversations with one of them—that many of the 25 out of 50 who responded did indicate what techniques or

methods they would use. And on the second round, where the questionnaire went to the 25 who first responded, a prioritized list of effective techniques and methods derived from responses to the questionnaire was presented. Respondents were asked, "Please prioritize the list of strategies based on the frequency with which you would use them." Twenty-three of the original 25 respondents replied.

Now tell me, what sense does that make?—to say in advance what technique or method you would use if you were going to do an OD project in a given set-

personalities of the children—as well as, of course, the national and global currents affecting the society at large. There is no such thing as a 'creative curriculum' divorced from personalities and social context. For me, this is especially so, because I see teaching as a sympathetic exchange which takes place through the medium of personal relationships. . . . "

To be able to be relevant in the here and—now takes a person who is centered, who is sensitive, who is flexible, who has tolerance for ambiguity, and who can stay with the immediate situation and help

consciousness-raise) the objectives and purposes that are central to them and to work with them to help these unfold. As I think of words that are related to this conception of OD, the following come to mind, and they cut across the three central attributes of OD that I have mentioned: common purpose, community, peace, hope, trust, compassion, caring, love, involvement, a sense of competence and of worth, development, fulfillment.

Out of the years of close work I've had with many of you and people like you, I deeply believe that most, if not all of us have been primarily attracted to OD because of these attributes and because we have felt that our presence might make a difference with individuals, groups and organizations and the purposes they hold in common. If I were to ask you, "Why did you move into OD, and why do you stay in OD?", you might give some kind of off-the-cuff surface-level answer. But I think if I could watch you as you function and talk with you of your feelings as you face the agony that we often face in our work, the possibilities of burn-out, the tiredness and the discouragement, I would clearly sense that which keeps you centered in this work is a real adherence to these aspects of OD and your deep belief that in some small way you can make a difference about things that really matter to you in this life.

You are not alone. As each of us plays his/her own small role in this profession, I say once again—as I've said often in speaking and in writing—that the principle instrument that we have to use in this field is ourselves. We do have the tool kit, but the effective use of that tool kit depends upon us—the sensitivity, the flexibility, the tolerance of ambiguity, the caring for the humanistic values, the setting of a model of what a human being can be. Very much depends upon us and who we are.

Abe Maslow, in his last public session (at UCLA), said: ". . . helping in the first place is a very, very hard job and the helper can be a clumsy fool—the helper can be a hurt. Very frequently it would be best to be Taoistic about helping; to keep your damn' hands off is frequently the best way to help. To know when to be available and when not is to think of the helper as being

If I were to characterize OD at present, I would say that it is less humanistic than it was a few years ago; and I am concerned that the trend is in the direction of even less humanism. People are becoming less important to us, less central than issues such as, "Can I run this kind of exercise?" or "What is the latest method being used?"

ting where in advance all you knew were some generalities of that particular area, say education, without being on the spot, sensing the people, sensing the organization, the unfolding issues, and so on. And yet 25 top consultants, internal and external, responded to this. What does that tell us about our field?

A number of years ago, Phillip Lopate (not an OD practitioner) was assigned to a public school in New York City as an artist-in-residence, a writer, to bring a range of artistic inputs to the school system. He has written a book, *Being with Children*, about his experience. In one part of the book, he writes: ". . . Too often, it seems to me, studies about how to work with children in creative subjects concentrate exclusively on the exercises or techniques of stimulation, making the techniques appear an end in themselves, segregated from the local political, ethnic, and economic conditions in which the teaching will have to take place. . . . It seems to me that the tasks which one sets for oneself and the children to accomplish, in poetry, drama, film making, painting, or whatever, grow directly out of the unique local situation in which the teacher finds himself and out of the unique

those with whom he or she is working to flow once again with the river.

Let me return once again to the conference theme, "Making OD Operational". I thought, originally, of dealing with the topic, "What is OD?". Marv Weisberg spoke most stimulatingly to this question at the last OD meeting in the east, and it's been dealt with by many other persons in various ways. We all seem to have our own notions of what OD is, and I certainly have mine. I'm sure OD encompasses many different attributes, but to me it centrally includes the following: First, a body of humanistic values—values that say something about human beings, about us as practitioners, and about the people with whom we work in ongoing systems. Second, personal, interpersonal, organizational, and inter-organizational processes deeply rooted in such values. And third, the possibility of growth (development, unfolding) of individuals and of all other social entities toward ends widely and poignantly yearned for by the individuals with each entity.

I think that we try, with our values and with our processes, to help those with whom we work to make explicit (to

available, being a consultant, rather than being the manipulator, controller, interferer, giving orders and telling people what to do. . . . The helper is very frequently just a plain god-damn nuisance—as, for instance, anybody in the ghettos can tell you. Why should it be that the social workers, who want to help, who devote their lives to helping, should be so frequently despised and hated? I've suggested that the Bodhisattvic kind of helping is a reliance on the self-choice of the person, with you the helper being available at the wish of the other, rather than you the helper taking control of the situation and telling people

what to do. This implies a kind of humility, also, because in effect what I'm asking here is that the helper become a very perfect person. What is implied, therefore, is that one of the paths to being a helper is to become a better and better person . . . , in the sense of maturing, evolving, becoming more fully human If you want to help other people best, improve yourself. Cure yourself”

Perhaps the first step in making OD operational is to see that we are operational ourselves.

Robert Tannenbaum

Ed Note: At the time this article was originally published, Bob Tannenbaum was Professor of the Development of Human Systems (Faculty Early Retirement Program), Graduate School of Business, UCLA. He lived in Carmel, CA.

PracticingOD

» Employee Involvement: The Key to Commitment and Successful Change
By Diana Vienne

Welcome to *Practicing OD*, a collection of short articles (900–1200 words) on useful ideas, lessons learned, and practical suggestions for managing the day-to-day challenges of doing OD. We welcome brief case studies; guidelines and tips for applying proven or cutting-edge methods, principles, processes, practices, interventions, and tools; and thought-provoking essays on practice-related challenges, questions that emerged from a client engagement, or new trends and technologies that will influence the practice of OD.

Submit Microsoft Word electronic copies only to:

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Include your name, phone number, and email address. If your article is accepted for publication, you will be notified via email. We look forward to hearing from you.

Submission Guidelines

- » Articles should be practical and short (900–1200 words; 3–4 pages single-spaced)
 - Write in your own (first-person) voice using simple, direct, conversational language.
 - Focus on **what** you are discussing, **how** it works, or can be used, and **why** it works (what you believe or how theory supports it).
 - Use bulleted lists and short sections with subheads to make it easier to read.
 - Include everything in the text. No sidebars. No or very limited graphics.
 - Do not use footnotes or citations if at all possible. Citations, if essential, should be included in the text with a short list of references at the end of the article.
- » Articles can be written from various perspectives, including but not limited to:
 - Brief case studies that highlight useful concepts, applied theories, lessons learned, and implications for future practice.
 - Guidelines and tips for applying proven or cutting-edge methods, principles, processes, practices, interventions, and tools.
 - Thought-provoking essays on practice-related challenges, questions that emerged from a client engagement, or new trends and technologies that will influence the practice of OD.
- » Include a short (25–50 word) author bio with your email so readers can contact you.

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“To shift hearts and minds, employees must be fully integrated into the key levers of the organization’s success and have a voice in decision-making, continuous improvement, and change initiatives.”

Employee Involvement

The Key To Commitment and Successful Change

By Diana Vienne

We know that long-lasting behavior and mindset shifts take sustained effort, significant investment, and deep organizational commitment. But implementing real change is only possible when leaders can recognize and unlock the potential of pivotal moments along the engagement continuum—shifting employees from passive involvement to true leadership and advocacy.

The Engagement Journey

Engaging hearts and minds is a long process, which requires progressively increasing levels of employee involvement. In our experience, the engagement journey moves through the following stages along a continuum (see *Figure 1*):

1. The journey begins with awareness: employees have knowledge of the change they will be embarking on.
2. Once employees are informed about upcoming changes, they can begin to understand why the changes need to be made. They develop a deeper understanding that will lay the foundation for further engagement.
3. If change is handled well and employees continue to engage, they can

progress from understanding the “what” and the “why” to a new level: commitment. As leaders reinforce benefits and address resistance and roadblocks, employees can begin to believe in the change and are willing to be a part of the process leading to the new vision.

4. When leaders believe the vision will have positive outcomes, employees begin to take action: they accelerate change by making the shifts necessary in their day-to-day activities to bring the vision to life.
5. Once the commitment and action stages have been navigated successfully, employees will become advocates for the change and influence others to commit to take action with them.

Figure 1 shows the key stages of the engagement journey and the level of active involvement required. This model builds on the industry’s recognized stages on the employee engagement spectrum by adding a critical final stage—the proactive championing of change.

Commitment: The Pivot Point from Passive to Active Behaviors

Each stage of this process requires attention because the stages build upon each other. An employee will not move from awareness to advocacy without the interim stages of understanding, commitment and action. Commitment is the most critical stage in a person's engagement.

Commitment comes after awareness ("I have heard") and understanding ("I know"). It's where the heart comes into play. This is the point where an employee or manager can say "this is the right thing to do, I am ready to take voluntary action" ("I believe"). Only after moving through the feeling of commitment will an individual begin to embrace and activate the change—because they see the value and positive impact in doing so. They move from being a passive participant to actively bringing the change to life.

To ensure commitment to change and to continue to push their people along the path to action, leaders must *involve their people in the change process*. Involvement is more than simply attending meetings or participating in events. To shift hearts and minds, employees must be fully integrated into the key levers of the organization's success and have a voice in decision-making, continuous improvement, and change initiatives.

Involvement is Critical for Commitment: A Case Example

Recently, we worked with a business unit of a global pharmaceutical company that was looking to gauge how well their new organizational priorities were being adopted and understood by their people.

Their goals were to:

- » Activate strategic priorities in their employees' day-to-day work,
- » Accelerate change adoption,
- » Target solutions that overcome barriers, and
- » Engage key audiences.

To understand the current landscape, we conducted a listening tour, which included

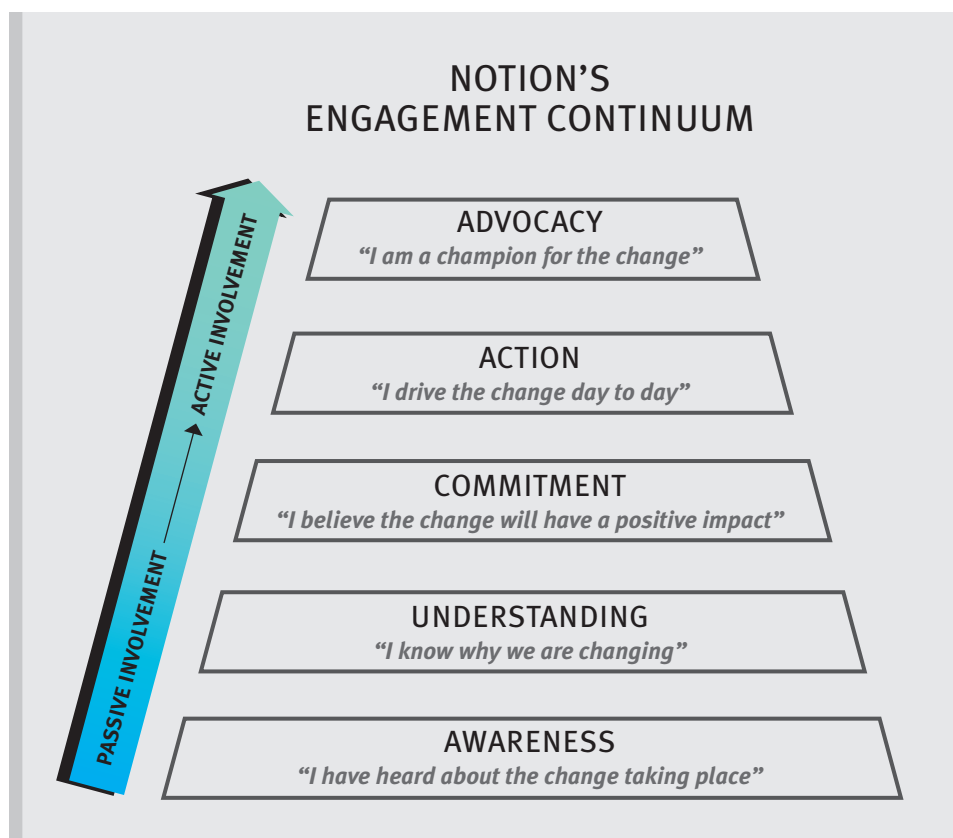


Figure 1: Notion Engagement Continuum

interviews with their executive team, and virtual focus groups with the executives' respective employee teams. We asked for feedback on their adoption of new company priorities. We gathered data on communication, the level of change required, and the ideas individuals had on increasing effectiveness.

As a result of the findings, executives realized they had not moved the needle in a meaningful way. They realized that to drive adoption, they would need to get more involved and engaged. The leader of the business asked each executive to volunteer to lead the workstreams that were most interesting to them. Workstreams were defined as initiatives that addressed priorities—specifically, barriers to success in their new working model, such as simplification, communication, and career pathing. They invited high performing employees to participate. Leaders and employees committed to work together and built action plans into their day-to-day jobs that delivered progress on these business priorities.

How Involvement Paid Off for This Client

A move from passive to active involvement

Because both leaders and employees were involved in creating and implementing solutions, members of the team were able to pivot quickly and move along the engagement continuum to action and advocacy.

Building accountability and opportunity

The leader of this business unit wanted to communicate how important outcomes would be, so he fully integrated expected results into team members' performance goals, building accountability for very clear deliverables. Going forward, he instituted rotating membership within workstreams to build a holistic accountability to the success of all the work.

A rotating mix of leaders and employees working on these workstreams has many added benefits and opportunities. Leaders can tap fresh perspectives, improve collaboration, and elicit global opinions. The structure also recognizes high performers by giving them access to leaders and accountability for success. This

approach builds a network of champions and alumni, helping to amplify the long-term impact of the work.

Workstream outcomes:

1. Career development innovations

Career development workstream participants were tasked with finding ways for their people to advance their careers by getting more experience and exposure. As a result of their work, the company will pilot a job-shadowing and job-swap program in 2020 and redefine the career building approach for the organization.

2. More collaboration and information sharing across the globe

The research from our listening tour revealed that collaboration and communication were main concerns in implementing their new business model. The company created a workstream that addressed alignment between the global team and the country business units. The workstream helped standardize how information is shared and is now creating processes to leverage best practices across geographies.

3. Streamlining for meaningful work

The efficiencies workstream made significant progress in streamlining how work gets done, both individually and as an organization. As a result, 75% of colleagues have seen “some or major impact on meaningful time available for work.” The workstream will continue their work and tackle more significant organizational streamlining in the months ahead.

Ultimately, 7,500 people will be impacted by the changes implemented by these workstreams.

As these programs continue to gain momentum and more participants move along the change continuum, they are more likely to become champions for the change and bring others along with them on the journey.

Conclusion

We encourage who seek engagement, to think first about how to involve leaders and employees. We have found involvement is an important investment in long-term commitment and change success.

Diana Vienne is senior partner at Notion Consulting with experience in transformation, talent and OD. She built her career in consulting at Deloitte and PwC, then as chief talent officer with Omnicom and Havas. Diana supports non-profits and holds an MA from NYU in business education and organizational effectiveness. She can be reached at diana@notionconsulting.com.

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- » Case studies illustrating the value of OD to potential client organizations.