

WHY THE OD MOVEMENT IS "STUCK" AND HOW TO BREAK IT LOOSE

BY ROBERT R. BLAKE AND JANE SRYGLEY MOUTON

The conclusion that the Organization Development (OD) movement is "stuck" reflects the current status of a trend toward disillusionment and fragmentation of the OD movement that has been developing since the late Sixties. Its validity is being contested. As a movement-wide generalization, we think this is dead wrong.¹ It may be true for the version of OD which is expert-centered and catalytically-oriented according to the classical role model of the change agent as helper, facilitator, guru and confidante. But it is almost certainly wrong for theory-based, top-led, team-focused, instrument-reliant, organization-wide, self-help oriented approaches.

Why the widespread disillusionment? A simple reason: the process consultation approach is pictured as expert-centered, catalytic in character, and as focusing on small groups. This approach, which has been popularized by Schein,² though possibly useful for individual development, has not had a

meaningful cause-and-effect impact on bottom-line results or on satisfaction with organization life.³ But to extend this generalization beyond its area of validity is to overkill.

We want to sort out what we see the deeper issues to be and then specify directions in which OD must go so that strategies of development that are geared to the needs of institutional change are able to reduce the current "stuckness."

The history of OD is recounted in Part I. This is basic for understanding the OD fundamentals in Parts II (October '79) and III (November '79). With history to supply background and to clarify issues, the reader is in a better position to grasp the implications of what follows.

Part I: OD History

The history of OD remains to be fully recorded, but it is essential to understand history in order to comprehend what is now occurring and the prospects for the future.⁴ Even though based on our early work, the Exxon Baton Rouge

seminars in the Fifties were antecedent to but unrelated to OD except in an indirect way.⁵ Courses were designed to introduce Exxon managers as individuals to (1) behavioral principles of teamwork in an experiential way, and (2) focus on the research that we had been doing at The University of Texas on intergroup conflict and cooperation,⁶ as the Baton Rouge organization at that time faced a very serious strike threat from its union. This research was highly pertinent to understanding the win-lose dynamics that were involved and for conceiving possibilities for restoring problem solving. Two important things happened at Baton Rouge.

Because of the respect at the time for Harvard by Exxon executives, they insisted that the seminars, or laboratories as they were called, should be half and half — half case study method to teach business logic, and half modified T-Groups to permit learning of group process. Barnes and Orth, both of whom were Harvard Business School faculty and represented that point of view at the time,

designed the case study and led the case study work. Herb Shepard and I, with Jane Mouton helping me, took responsibility for the T-Group aspect. After each laboratory a participant critique was held to evaluate the design. As a result, and after completion of four laboratories, the case method was eliminated. The negative reactions to it were too great. These "outside" cases were simply too unrewarding against the liveliness of the modified T-Groups and other self-analysis activities.

The second important conclusion was related to the role of the trainer in T-Group. It is important to emphasize that these were not straightforward T - Groups but were altered for the following reasons. The prevailing trainer norm at National Training Laboratories, the major source for T-Group expertise, was that each laboratory faculty member be free to design the two week sequence of his or her own T-Group. Against this background of tradition, Exxon management insisted on only one "imposed" requirement in those two week seminars: *that each laboratory contain a design which permitted managers to experience and study intergroup tensions, examine their own behavior in the intergroup situation, and thereafter derive generalizations about how to bring about intergroup collaboration and the particular problems of pressures on representatives attempting to do so, particularly as these might be applied to their own union-management situation.*⁷ Nierenberg learned about this research at the Korzybski Memorial Lecture I delivered at the Harvard Club in New York in 1958 and built his approach to negotiation training based on it.⁸

In this design, two T-Groups were pitted against one another in the effort to see which group could produce the best product. There had been no intergroup designs in Bethel up to this time, even though Jane Mouton and I had developed it, published articles about it, and had used the design in our HRTL laboratories at The University of Texas for several years. As a matter of fact, we had repeatedly

tried to get the intergroup design introduced and on one particular occasion had described it in detail in personal discussions with Bradford, Benne, and Gibb, then at the helm of NTC. However, Bethel T-Groupers strongly resisted utilizing it, feeling the design encouraged disruptive conflict rather than helping participants arrive at a sense of mutual support and understanding under more harmonious, low-conflict conditions.

Instrumented Team Learning: In the Beginning

Back to the intergroup experiments. Some of the T-Group leaders became personally involved while participating in the intergroup design. By virtue of their involvement, they became emotionally committed to their own group's particular product and began to act in support and defense of it, rather than continuing to maintain the professional orientation as a behavior observer and process interventionist that trainers had come to expect of one another. Because of the lack of understanding, resentment or over-involvement in the intergroup design by the Bethel behavioral science staff members, Jane and I proposed that trainers *absent* themselves from their groups when products were being discussed so that they would not involve themselves as a protagonist or resister.

This was the true beginning of *Instrumented Team Learning.*⁹ It became evident that the groups were able to manage themselves quite well (1) under the autonomy created by the absence of the trainer, (2) with written instructions for the task to be accomplished, and (3) with feedback instruments to focus attention on study and self-management of critical process variables pertinent for learning about group dynamics. Of course, the *pathway* regarding how members reached the goal from where they began this session was wide open, meaning that members had the opportunity to manage, or mismanage, themselves and then to study their experience in order to learn from it. This research led to the social approach related to the living

aspects of hospital psychiatric treatment.¹⁰

In our view, these two significant learnings, *i.e.*, the rejected role in laboratory learning using the case method conducted under Harvard conditions and the advent of Instrumented Team Learning, came from the Baton Rouge experiment. However, as indicated earlier, this change effort cannot be regarded as organization development. Furthermore, there was little or no real effort beyond an exercise or two to aid managers to translate or implement what they had learned for use in the back-home environment. This was probably the third discovery: without programmatic followup, it is self-evident that seminar fallout and fadeout is much too severe to justify the learning effort itself.

These several learnings were in place when the second experiment began. This took place in Bayway, N.J., where I was employed on a three-year contract to literally "live in" and carry out whatever interventions seemed appropriate for helping the organization to become more effective. In addition to living there for three years, I dictated in detailed tape recordings what I was doing, about which I will have more to say later. I believe the Bayway experiment to be the first genuine, bona fide, deliberate organization development effort. We made the first recorded reference to organization development in this setting.

This effort was inaugurated with a series of laboratories calculated to "unfreeze" managers by getting new ideas introduced in the culture. After the first six programs, which were designed along the lines of the Baton Rouge model, we converted to fully instrumented groups for the entirety of that management, which involved something like 18 additional seminars. This means that teams constituted self-help learning groups from beginning to end, without ever having a trainer with them. We demonstrated that post seminar evaluations revealed "no significant" differences in learning from typical T-Groups.¹¹ The obvious advantages to the seminar



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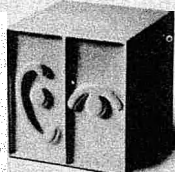
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itself were (1) reducing trainer dependency and (2) increasing the comparability of learning from one seminar to another by eliminating trainer variance. Another innovative feature was the use of the "power spectrum" as the theory base for analyzing power relationships.¹² Thus managers had a common language to talk about leadership in addition to the process learning experience.

The original experiments involving team development occurred during this period and were tried out again in the Pacific Finance Corp.¹³ This effort was a double check on our Exxon work. It was particularly important for Jane and me, for it was far more than evaluating a change technology in two radically different kinds of businesses. It was an East versus West Coast test, where two quite different life styles were pitted against one another and where West Coast people doubted work-centered team building would "work" within their freer, more expressive life style. Team building for integrating individuals into an effective team was proven to cut beneath surface differences, and its soundness for aiding people who work in close cooperation to get it all together was demonstrated.

Multiphase Approach to OD

A number of followup steps had impactful effects in the Bayway organization. This led us into the multiphase approach to OD. They were possible because Bayway managers already had a good grasp of how to learn and problem solve under a team environment, thereby enabling them, with consultant help, to apply team learning skills to solve teamwork and operational problems.

One example involved a series of norm-setting conferences concerned with, "Is it possible for this management to have a problem-solving relationship with this union?" Several hundred members of management debated this question, in groups of 10 or so, in one day seminars attended by 30 managers each, with the top three members of Bayway attending all sessions. This experiment led to a

simple answer: "The only way we can solve problems with this union is first for all members of management to treat the union officers and members with dignity and respect." That became the norm in terms of which new behavior toward the union was to be guided.¹⁴ Eventually there was a tip-over from a win-lose, two-sided, competitive climate¹⁵ into a problem-solving orientation. There were many other similar projects in this first OD experiment involving early quitting, tool control, team building (with a special project on delegation), and so on.

I might comment as to the originators of OD. . . . I was a consultant to Herbert Shepard as an Exxon headquarters employee at the time. When I took the assignment at Bayway, he was in the situation on a periodic basis, yet not as an OD consultant in the sense of being concerned with or responsible for shifting the culture of that organization. He and I consulted, but his contribution was occasional and supportive of my efforts rather than the other way around, as has frequently been said.

The other person truly in the situation, though in absentia, was Jane, still a professor with The University of Texas. Each day when I returned to my apartment, I dictated taped material describing what the problems of the day had been, any interventions I had made, and predicting the consequences that might be expected to arise from them. Later on, when the problem had been resolved one way or another, I also recorded this and forwarded it to her.

This put Jane in a circumstance comparable with the control analyst in a training psychoanalysis. Not being emotionally involved in the day-by-day transpirations, but having an expert grasp of social psychology and T Group, consultation, etc., she was able to critique my interventions and help me see actions I was taking that were not constructive, and others that I was failing to initiate that could have been helpful. Thus she was truly the cooriginator of organic OD.

The third experiment at the

Exxon refinery in Baytown, Texas immediately followed the second.¹⁶ By this time Jane and I had converted to a theory-based behavior learning environment, centered on Grid theory and relying fully on self-help Instrumented Team Learning. The distinguishing feature of the third experiment, beyond the elaboration of technological sophistication, was that it told us that the steps of follow-up beyond the educational or process learning of Phase 1 had

to be even more systematic, better organized, and more instrument-centered than they had been at Bayway. Thus we came to see the importance of a Phase 4 Ideal Strategic Model way of aiding management to regain control, or even to establish it for the first time, over the entire direction, flow, tempo, character, etc., of the organization, including its external relations, policy, financial goals and so on.

During the series of experiments

in the Exxon organization and Pacific Finance Corp., we began important work in the Internal Revenue Service which constituted a bureaucratic model of an organization rather than a profit-centered business.

When talking about their situation with them, managers and administrators were frequently heard to say something like, "You can't buck the system;" "You can't beat the system;" "You can't fight the system;" "Once an activity gets into the system it goes on forever;" "You can tell that the system is out of control;" "Eleven approvals are needed before a person can be hired;" "Every letter is reproduced with six carbons;" "Every decision is triple checked with the boss and with the boss's boss before action can be taken, and every triple check slows work performance to a snail's pace;" "Managers document every decision to avoid responsibility if failure results;" "The buck stops nowhere."

What these managers were really saying was that the system was not under managerial control, and yet, by virtue of its insidious effects on individual managers, it exercised "control" over everyone operating within it. Thus, productivity, effectiveness, efficiency, and satisfaction with work were diminished.

We were to learn more fully in this experiment how to make it possible for managers to reestablish control over the "system." For us that became and continues to be the deeper meaning of OD. Once control over the system has been realized, it becomes possible to institute those changes necessary to ensure fuller utilization of human resources in pursuit of organization objectives. Learning to establish or to reestablish control of the system is probably the most important challenge facing industry and government today. As organizations become larger and more complex, it becomes all the more important for management to establish or to reestablish control over the system if its stagnating, stiffening, and stifling effects which produce inflexibility are to be avoided.

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The Importance of "Critical Mass"

Back to Baytown. Though we had seen it at Bayway, this experiment was one in which wage participation led us to the importance of critical mass for producing switch-over or tip-over effects.¹⁷ An experiment on safety in which all members of supervision and wage personnel participated in a multihour instrumented learning design clarified this point. Supervisors and employees came into the safety seminar pointing to "them," meaning that higher management was responsible for the horrible accident rate. It was said management had reduced the number of safety inspectors, frowned on people going into the field in pickups two at a time ("If one of us gets hurt, there's always another one of us there to help out"), as wasteful and so on.

This session ended by people saying, "When you come right

down to it, we are the last link on the safety chain. If we don't take responsibility for the safe working practices of ourselves and of one another, we can look forward to a continuation of accidents. But if we do, we can bring them under control immediately." This was done. The safety performance improved dramatically thereafter, becoming one of the best in the industry.

Experiments following Baytown, particularly in the Internal Revenue Service, Lago Oil & Transport, a subsidiary of Exxon, and in many other companies — British American Tobacco, Unilever, etc. — relied upon Phase 4 for Ideal Strategic Modeling. This practice has been continued and consolidated with companies that have completed Phase 4 such as Lever Brothers, TRW, Kohler Co., and on the government side, the Naval Electronics Laboratory and the National Bureau of Standards. Even in the field of religion, an Ideal Strategic Model (successfully using the business-oriented design) also has been completed by one of the Synods of the Lutheran Church. They concluded that, in a fundamental sense, they are in the franchise business.

This OD, then, was quite a different OD than it had started out to be several years earlier, and its major features will be outlined later on. Some early distinctions can now be made, however.

When OD is Not OD

A point of confusion in the OD movement is concerned with distinguishing those change activities that take place within organizations that are unrelated to organization development from those which are definitely geared to developing the organization.

It seems to us that the "O" in Organization Development deserves to be respected for what it is: the total system existing within a larger external environment which consists of interacting parts, including traditions, precedents, and past practices, all of which are geared, or should be, toward achieving an overriding purpose.

Now against the background of this designation, it can be seen that individual development, even

if it were to involve 100 per cent of the managerial manpower, would not be organization development. In no way are individuals interacting parts when viewed in isolation of one another. By virtue of the fact that individuals in isolation can do little or nothing about changing traditions, precedents, and past practices, "11 approvals, six carbons," etc.; the "O" is missing.

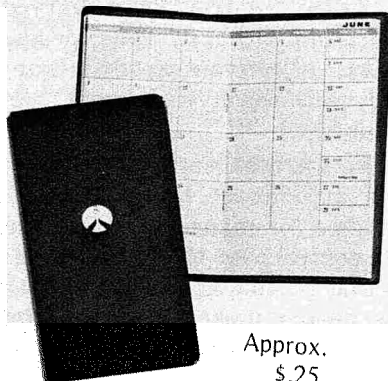
The same really goes for Team Building. The fact that a consultant calls him or herself an OD consultant and sits with a team that is a subunit of an organization, offering procedural help in its deliberations about how to improve performance, has nothing to do with organization development. The reason, among others, is that teams are interacting parts and a team in isolation can do little more than bring improvement into its internal happenings.

It follows then that Intergroup Development, in and of itself, also fails to meet OD criteria.

When all of these take place, and are followed by the culminating activity of the top group examining, identifying, and making explicit the overriding purposes in terms of which the direction of the organization can be identified, and when these goals and purposes are converted into programs and action and communicated clearly and they earn the commitment of those at lower echelons, the approach might more accurately be said to constitute organization development.¹⁸ Of course, when implementation is complete, then it is quite appropriate to talk about an "organization" having been involved in organization development.

In coming to these conclusions, we had a major advantage that others have not had the good fortune to enjoy. Because of our extended work in Exxon, we didn't have to take an approach to organization development which was unprogrammed and based on "trial and error." After the first project in Baton Rouge, we went on to the second Exxon organization. We asked what could we have done at Baton Rouge that would have strengthened the effort. The an-

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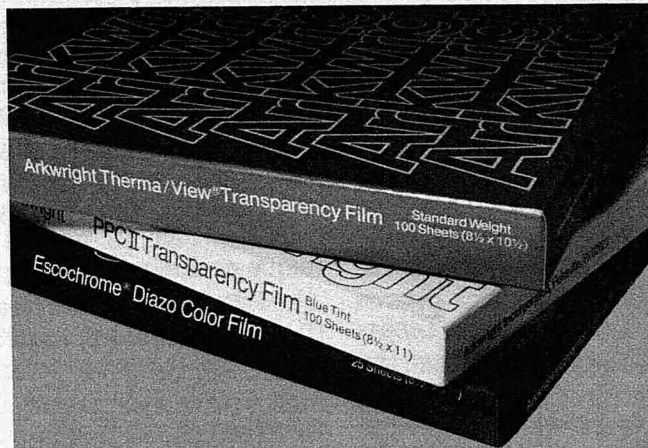
swer was that we hadn't had followup. The second time, in Bayway, we introduced followup. Then, when that project terminated, we were invited to Baytown, and, again, we asked ourselves what we did the second time that we should not repeat in the third system. At Baytown we concluded that the change we needed to make was to avoid trainer dependency, so we removed the trainer through instrumentation and strengthened follow-up. Then we went to a fourth site, Lago, a refinery down in the Caribbean.

"Ideal Strategic Modeling"

At Baytown we had not gone deep enough into the ideology of the firm. So we learned to do "Ideal Strategic Modeling," involving critique of the strategy of business logic being applied after the behavior phases of the Grid. In addition, we found that the organization was significantly influenced by external factors, in this case the local government. These factors also needed to be faced by management in a deliberate manner in order to be able to change the internal system.

In summary, we have been able to make progress in a systematic, coherent, longitudinal sense earlier than other people because of these sequential opportunities, each of which quickly followed after the other and involved the same kind of people and the same kind of socio-technical system. Once we had developed the basic model, we had many opportunities to go across industries, agencies and cultures to generalize what we had learned. Most people in our field have never had this kind of a learning opportunity.

The reader might ask, "How can one approach be pertinent when applied to organizations of different sizes with different characters (profit versus bureaucratic versus religious), different problems, and operating in different cultures with different religions cutting across cultures?" Behind this question is the notion that every situation is unique and different. Therefore, the OD approach must be tailored to particular circumstances to be effective.



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The error behind this question involves failure to distinguish between strategy and tactics, and sound problem-solving behaviors based on principles as described in Part 2 of this article (October '79). These principles, at the strategic level, are the same whether in Exxon, TRW, Pacific Finance Corp. or British American Tobacco. They are the same whether the organization is located in the United States, Great Britain, Saudi Arabia or Japan. What is different are the particular violations of principles at the tactical level. These vary with the setting. Relying on sound principles, for example, it becomes possible through team building, intergroup development, and ideal strategic modeling to correct whatever violations of principle are found in the character of the local situation.

An analogy may help. There are no principles of physics that are distinctive to building the building in Baton Rouge, Linden, New Jersey, or Baytown, Texas. But the engineering applications of

these principles vary with swamp land, desert, plains and mountains. It is in this basic sense that the Grid OD approach becomes applicable to all organizations and useful for solving the full spectrum of specific problems, no matter how unique or distinctive they may be.

Grid OD Contrasted With Other Approaches

This can be done by three examples of major nonorganization development approaches to change. One involves management by objectives as formulated by Odiorne¹⁹ or Humble.²⁰ As we see it, these approaches to management by development ignore the problems of the human system existing among those who are engaged in setting objectives with subordinates. Presumably this is on the assumption that a mechanical system can be inserted into an organization and that doing so will bring about change and contribute fundamental benefits. Yet we know that management by objectives is now characterized as a national tragedy. Is it because management by objectives is wrong as an approach to effective organization behavior? Or is the answer to be found elsewhere? Management by objectives is basic, sound and inherent in any management system which is under full control of itself; therefore the answer must be sought elsewhere.

In our view management by objectives should be introduced along with and toward the end of the *behavior development* process rather than being implemented without first resolving the many culture problems within the system which otherwise loom up as barriers to its effective implementation, almost to ensure its failure. For example, a 9,1-oriented manager surely introduces management by objectives in a 9,1 way, imposing objectives or goals or quotas on subordinates, provoking resentment rather than involvement, and then supervising closely to ensure that the subordinates will not "escape" from carrying out the objectives as they have been instructed to do.

A 1,9-oriented manager takes the same management by objec-

tives program and deals with it in an extremely soft manner, inviting subordinates to think out what objectives they would like to realize and then agreeing with them on their pursuing them. This is management by objectives in which the boss's contribution is limited to encouragement and support. Real issues of possible conflict are avoided by the boss withholding his or her thinking that might clash with the subordinate's view of things. Goals set are likely to be meaningless to the organization and abandoned by the manager soon after the romance wears off. The same basic point can be made with regard to other Grid styles.

The important issue here is that if self-help motivations have not been created. If an open leadership style has not been developed, or high standards for contribution have not been aroused, then insertion of management by objectives is doomed to failure. The existing culture of the system will absorb the approach to management by objectives into itself and diminish or destroy its otherwise potentially beneficial effects.

TORI and Behavior Mod

Another contrasting approach is TORI, i.e., the anachronism for trust, openness, respect and interdependence, introduced by Gibb.²¹ Such wonderful "feeling" words as trust, openness, and so on are almost impossible to bring into realization in an unstructured, trainer centered, experiential, theory-free way. Even granted that such might be possible, this level of process development is only half of what organization development is all about. The other half is the strategic modeling and operational implementation of the model, as in Phases 4 and 5 of Grid OD, entailing as it does the introduction of management by objectives under the most motivating sense, where all organization members have committed themselves to the pursuit of excellence.

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"Many people lifted the OD label and used it because of the popularity and reputation it had earned by the mid-Sixties. Almost any activity concerned with development that took place within the organization automatically came to mean OD."

to arouse a high motivation throughout the organization's membership to contribute to its success. Indeed, without explicit efforts to formulate and implement these, it may have the opposite effect of creating a softness in the entire system because people have been "taught" to "respect" the integrity of the individual "outside" the context of work.

Management by objectives fails to solve human problems existing in the system, while TORI and similar approaches do little or nothing to bring sound relationships into use in the pursuit of concrete work objectives.

A third approach to organization development rests on behavior modification — bringing a reward and reinforcement system into use, "causing" people to continue those activities that bring them reward and to drop those activities which fail to activate reinforcements.

Since someone has to mastermind the reinforcement schedules that are employed, it follows that the behavior modification approach to organization development is a subtle technique of controlling people's behavior without affording them insight as to the rationale that motivates one to produce better results.²² Therefore it is unreliable as a mechanism of bringing about development in the sense of individual members of the organization having better understanding and improved insight, greater motivation and commitment, and being more capable of autonomous functioning.

The behavior modification approach violates OD fundamentals by virtue of offering no type of learning concerned with participation and conflict solving skills of the kind essential for ideal strategic modeling and next steps of implementation and consolidation.

To group approaches such as Grid OD, TORI, management by

objectives and behavior modification together as comparable approaches to development, then, is to fail to comprehend the important systematic issues involved in successful organization development. A description of these issues follows.

What Went Wrong?

Here then is the history of OD starting from the beginning, and the approach described continues to be successful. But what has led to the idea that "OD" is stuck?

We think many people lifted the OD label and used it because of the popularity and reputation it had earned by the mid-Sixties. Almost any activity concerned with development that took place within the organization automatically came to mean OD. The logic is a mosaic logic — improve each piece regardless of how they fit together to make a picture or pattern, and you are automatically engaging in organization development. A number of techniques used by internal development people to stimulate change came to be called OD. These included such techniques as process consultation,²³ survey research,²⁴ family T-Groups,²⁵ consultant centered team building based on preliminary interviews,²⁶ collateral organization,²⁷ confrontation meetings,²⁸ organization mirror,²⁹ Gestalt approach,³⁰ use of action research model,³¹ force field analysis,³² life-career planning laboratory,³³ and assessment center.³⁴ The inevitable result, however, was that they attached to the concept of OD whatever subjective meaning the use of these techniques had for them.

The faultiness in this logic is that it is the patterning of relationships relative to the objective of the organization that dictates whether or not individual effort impacts on the organization capacity. If it does, this is organization development. If it does not, it may be individual

or team development, but it assuredly is not development of the organization. When a polyglot of approaches, which in effect have little or nothing to do with one another except for surface similarities, are all grouped under a label, the label becomes meaningless. Confusion is inevitable.

OD can only be unstuck by restoration of emphasis on fundamentals of change, and systematic implementation of these fundamentals for organization use.

We will specify these in the next issue of the *Training and Development Journal*.

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