

USING THE LABORATORY METHOD TO TRAIN CONSULTANTS AND CLIENTS

*the strengths and
weaknesses of T-groups
for internal and
external consultants*

The processes of organizational change and organizational development are here to stay. In the past ten years, there has been a tremendous upsurge in the amount of thought and energy put into planned change of social systems, particularly business organizations^{1, 2, 3, 4, 5, 6} and educational systems,⁷ but including also governmental systems,⁸ mental hospitals,⁹ and many other types of organizations. It seems fair to state at this time that, in this country at least, the attention paid to continuous organizational development or renewal can only increase; more and more systems are becoming aware that their survival and growth hinge on the ability to diagnose changing needs, to perceive potential resources, and to invent the steps necessary to bring the two together.¹⁰

Along with this shift in the conception of change from an unusual, crisis activity to a regular, natural part of a system's healthy life, there has emerged a shift in the conception of the role of the "consultant." Consultancy traditionally has meant functioning as an expert who, when called in to solve some specific organizational problem or crisis, collected data and provided a solution to the client system as to what it should do. There is a trend, at least in behavioral-social system change efforts, away from a *content-oriented* "expert" consulting role and toward a *process-oriented*, "facilitator" role aimed at helping the organization develop its own built-in competencies for continuing change and development.

Bennis¹¹ has done an invaluable job of thinking and writing about the longer-term, process conception of change; and his and others' recent work makes it clear that the consultant role is no longer primarily played by someone *outside* the system. In this article, the term "consultant" is meant to apply to both external and internal change-agents; the defining characteristic is simply that a person in a consulting role sees as his primary responsibility the facilitation of change in the system's procedures, climate, policies,

problem-solving processes, etc., rather than having primary responsibility for the content of any of the organization's external (such as marketing) or internal (such as accounting) tasks.

NEW CONSULTANT COMPETENCIES

Whether external or internal, the consultant emerging today has a need for a different set of competencies than those required in the past. Rather than being primarily called upon to be knowledgeable in a content area like organization structure or general management practices, this new consultant needs to be aware of current theories of organization; to be self-aware; to be skilled in diagnosing resistances to change; to create appropriate learning conditions for different problem areas and different personal styles among clients; to confront conflicts between himself and the client in a constructive manner; and so on. This is a much more demanding role, and the processes required for developing process skills are presumably different or at least more complex than simply learning the content of behavioral science and management theories.

If you accept these demands as being at least partly realistic (I think they are *understated*), then it follows that those engaged in the process of developing this new style of change activity have a responsibility also to concern themselves with how process-oriented change consultants are trained or developed. We need to concern ourselves with developing theories and gathering data on learning processes relevant to these role behaviors. To my knowledge, very little has been put down in accessible form to date. Truax and Carkhuff's recent volume¹² on the development of psychotherapists has much that might be used in this area; but more importantly, it is an example of the kind of work that we very much need in the field of organizational change.

One motive in writing this article is to spur the task of developing learning

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processes for consultancy. As a vehicle for doing this, I will discuss primarily my own observations and experience with one device for training consultants — staff work in the T-group and related laboratory designs for learning. I will also be discussing, not at all incidentally, the T-group's use as a means of training *clients* as well. Considered work on training clients to develop effective conceptualizations of their own roles in the helping process has been in even shorter supply than that on the training of consultants.

THE T-GROUP AS A SYSTEM

When I refer to the T-group or to the laboratory method, I mean a behaviorally-oriented learning setting which creates immediate social conditions which provide experiences for the participants and staff; and these experiences are used as the major data inputs for learning. A number of features of the T-group are relevant for our purposes. One is that the learner usually has primary responsibility for his own involvement, behavior, and learning. Another is that it is usually a face-to-face group where people can act and give and get reactions with a relatively efficient use of communication energy (e.g., they don't send memos, wait a week for replies). Another aspect is that there is a conscious social design to the group: the group has reasons (usually learning, although individual goals may vary widely) for existence; it is not accidental; it is time bounded — it has a starting point and life span, usually specified in advance and quite limited (a weekend, a week, two weeks, etc.); and it has a certain membership, also usually specified. I have described this process elsewhere as "reality training":¹³ learning how to use the data in an immediate situation to learn from our day-to-day experiences.

MICROCOSM CULTURES

In essence, this view is similar to Slater's conceptualization of the T-group as a "microcosm" of a larger

system or society. The group deals with many themes that a larger system goes through in more extended (and often less visible) ways: the birth, existence and death of the system; the survival of the system and its members; issues of control, conformity, deviance, value differences; and so on. The members create a culture, through both conscious and unconscious choices, which has dynamics qualitatively similar to many of the systems they live and work in day-to-day.

A staff member (or "trainer") who works with such a group is essentially a consultant (and is called that by the Tavistock group) to a system which has norms, values, roles, increasing differentiation and specialization, and other attributes which can be examined and influenced. As such he can obtain information about himself and his responses in that role, about the dynamics between him and the group, about change and different forms of resistance to change, about collaboration and dependency, etc. The more self-aware the trainer is in his role in the group, the more likely he is to learn things that can be generalized to his work with other, more complex client systems.

POSITIVE FEATURES OF THE T-GROUP FOR CONSULTANT TRAINING

To be more specific about this learning process, what are some of the features of the T-group setting that make it valuable and facilitate transfer of learning by the trainer to the consulting process in general? One feature is the compressed and collapsed time sequence of the typical laboratory session. This allows a trainer to act and to get relatively immediate feedback on the consequences of his intervention. For an organization, this kind of feedback often occurs over weeks or months and is much harder to connect with the consultant's specific behaviors. The T-group transaction is a little like time-lapse photography compared with sitting in a garden all spring — be-

sides being more closely connected to behavior, it also takes considerably less energy to get feedback on the impact of an intervention. Of course, this time-span varies with the nature of the intervention and the state of the group at a given time, and in a T-group there may be times when the time lag or the impact of an intervention is also such that it is hard to tie with the original act.

A second feature is simply that the trainer must make action choices in a context where people are interacting with him who look to him (either overtly or covertly) for some kind of guidance about appropriate behaviors in the development of the system. In this respect, he may choose not to act in a given situation, but this is in itself an action choice like any other and is a realistic alternative in terms of the kind of dilemmas he would face as a consultant in an organization.

ECONOMY - RECIPROCITY - MANAGEABILITY

A third feature of the T-group is that it provides a temporary system where structural and other kinds of changes can be instituted for limited periods of time with relatively small inputs of energy compared with an actual organization. This means that it is possible to experiment with new forms or new ways of intervening in a much more economical way than it is in a total system, and so to collect data in a short time.

Still another feature of the T-group which makes it good for this purpose is that it is a legitimate setting for discussing the reciprocal roles of the trainer and the participants — for looking at goals, choices, and personal styles, including those of the trainer.* The group setting often creates a freer

*Although staff members vary on their willingness to throw themselves into this. The obvious implication here is that a trainer loses an opportunity to learn about his own consulting behavior if he defines his own behavior as an illegitimate topic.

climate for interchanges of this kind. Of course one goal of an effective consultant-client relationship is to establish this open climate, but given the broader forces of the history and norms of the organization, it usually takes considerably longer and may be a less intense interaction than that established in the laboratory.

Another useful feature of the T-group is its manageable scale. Real issues, such as conflicting role expectations, tend to occur on a scale that can be understood without long study. The data are there to be seen, and the people are there to see them. This means that it is possible to get some understanding and generalize there about issues that would be much fuzzier and more unmanageable in an organization. This scale also has some drawbacks as well which will be discussed later.

INTERVENTION

The final positive attribute of T-group staff work that will be mentioned here is the opportunity for practice in collaboration with other staff in the process of intervention. The experience of co-training has much in it that can be transferred to team work in broader consultation: there are problems around different personal styles of the consultants; there are choices about how issues between the trainers are handled (on what level, openly within the group or in private, etc.) and there are effects of these choices on the change process; there are valuable data that each staff member has as potential feedback for the other, which can be filed away or shared in a common learning experience; and so on. I see all of these elements as quite relevant to the consulting process, and T-group work may help a consultant accept these issues as part of the role rather than as threats to be avoided. To the extent that there is this acceptance, the consultative process will be a growing, changing, learning one for the consultant as well as the client (and in fact *unless* it is that for the consultant,

it may not be one for the client in the long-term).

The list of ways in which T-group staff work experience can be generalized to a broader consultant role could probably be extended considerably. Given this potential, it is likely to be no historical accident that many of the newer breed of more process-oriented consultants have moved into consulting from beginnings as group workers and T-group trainers. I would say that even process-oriented psychotherapists, if they have shifted to large-scale systems work, have tended to use group intervention work as an intermediate step to sharpen their skills and build confidence in their ability to handle social system change processes.

BENEFITS FOR CLIENTS

Having focussed on the learning potential of the T-group for a *consultant*, let us look for a moment at what it can provide in the way of role training for a *client*. The first feature is that it does provide concrete experiences for the T-group member in the role of "helpee"—that is, in receiving help, both from the trainer and from other group members. He functions in a setting where he can self-consciously look at his own reactions to being "helped" or "not helped," and the extent to which he looks to the trainer for various kinds of expertise, especially in situations where he should be providing it himself. He also has a chance to get data from others and from the trainer about themselves as learners and their degrees of comfort or discomfort in that particular role.

More generally, a member who will be a client can explore what some of the necessary conditions for change are, and do this in the context of relatively manageable changes—namely, changes in the structure or process of the immediate group as it is functioning over a short period of time within a relatively limited framework. For instance, he may feel and recognize within himself resistance to changing

something as simple as the level of lighting in the group room, or the seating arrangement, etc. The T-group, it seems to me, provides very nice data for resistance to change and blocks both on an individual level and in terms of a group system level—and these become so clear at various points in the life of the group that they become a central learning in many lab situations. Often experiencing these blocks or resistances and seeing how much energy it takes to work them through can be a very eye-opening experience for a participant (and staff) to help him see how much work he has to do as a client if he is to facilitate changes in his own organization.

INCREASED CONSULTANT ACCEPTANCE

Another set of learnings coming out for the client as a T-group member has to do with developing a greater feeling for the legitimacy of organizational consulting as a process. This is especially helpful in developing the sense that it is not necessarily a failure or a sickness to ask someone to provide help from the outside. I think the notion of help on technical matters (research, accounting, information processing, etc.) still has more acceptance as a natural part of the growth of a healthy system with limited internal resources than does the reception of help on organizational and social processes. Managers and administrators in many different kinds of organizations feel that they should be "experts" on people, and this feeling can be opened up and explored in the laboratory training process.

Another very important kind of learning takes place for a client in a T-group; he learns observational and descriptive skills that essentially provide him with a behavioral *language* that he can use in working with a consultant. This language may be the most important single thing a lab participant takes home with him; it provides a base for further learning about self, for sharing new ideas, and for

working with behavioral science consultants in his organization. The T-group also legitimizes using this new language where it makes the most difference: in discussing the "here and now," immediate experiences of client and consultant with each other. In essence, the T-group provides a setting where trainer and group work out what the client-consultant relationship will be like in that given instance, and in the process many rich data are produced about this particular issue for other consultation processes. This may be less true, however, the more a trainer has a particular set program for how he ought to behave in that role. The more specifically he has his style or relationship with the participants programmed in advance, the less he is likely to learn about the process of developing a consultant-client relationship in a more unknown system.

In practice, many consultants today are sending their clients to laboratory training sessions as a part of the change process. My guess is that it is done by the consultant partly for concrete changes it will produce in the client, and partly (though not necessarily consciously) to train him at being a good client through the processes described above. An interesting parallel can be found in Malamud and Machover's *Toward Self Understanding*,¹⁴ which contains group experiments for people waiting to go into therapy. The notion that a therapeutic client starts out ahead if he is comfortable with using psychological terms, introspection, and looking at process clearly has applicability to clients in social system change efforts as well.

LIMITATIONS OF THE T-GROUP

Of course there are also several features of the T-group which make it not as good for learning about the consulting process. One of these is that it does have relatively limited time perspective: it is usually ahistorical and does not have an expected future life. This builds out of it certain very

strong realities (such as inhibiting memories of departed souls), which are there in the actual organization situation, and this makes it harder to learn about them. The same is also true for certain power aspects, at least in the stranger T-group, and it is hard to develop through the group the same kind of understanding of real reward systems that make a difference in a person's life in the way that this can be developed by working with an actual live organization. Clearly, ties to the past and fears of the future are existent in a T-group, but they are much more subtle and have to be teased out of the process.

In general, the T-group's strength — its face-to-face quality and its relatively manageable scale — also is its limitation for learning about organizational processes. Sometimes it is very difficult to generalize from this face-to-face communication experience to a very complex or structurally and historically rooted organizational problem with many things happening in unobservable and undefinable ways.

"MIS-LEARNINGS" FROM T-GROUPS

Of course, work in the T-group can also provide clients and consultants with "mis-learnings" at certain points. For instance, the consultant may learn through T-group work that the T-group is "the" answer as far as intervention in the organization is concerned, for almost any kind of problem or issue; or he may feel that all change situations in the organization are really T-groups in disguise and have their dynamics. In fact, at any given time the relevant strategies, goals, and structural problems may be quite unrelated to face-to-face interpersonal process.

From a client's point of view, there are several mis-learnings which he may come away with: one is that he may define his trainer as what a consultant ought to be like — which misses clearly the variability and range of styles that are possible for different change agents

and that are appropriate given different problem situations in the organization. I have seen many T-group participants who found it really difficult to accept somebody who behaved as a consultant in a way different than the first trainer they had experienced.

A second mis-learning that the client can carry away from a laboratory is that the message of the T-group is that this is what an organization ought to be like all the time. This clearly leads to problems when there are different tasks, different work groups, different demands made by the organization, and different relationships that different people form — some of which can be quite like a T-group and some which bear little resemblance to the low task demands of the T-group.

TRANSFER OF LEARNING: PERSONALITY AND SITUATION

The theme of this paper has been the use of the T-group as a learning situation for training in the roles of consultant and client. There are at least two major factors that determine transfer of learning from one situation to another: the nature of the situations (similarities, degree of threat in each, etc.) and the nature of the learner involved. Space does not permit dealing in depth with the personality question here, but before presenting some final situational ideas I would like to suggest in passing the kinds of personality dimensions that I think affect transfer of learning from the laboratory setting to the organization.

One important variable is level of basic non-defensiveness or tendency to attend to immediate experience accurately whether or not it fits one's present self-image, versus the tendency to repress or distort disliked data. To learn accurately, the laboratory trainer or participant has to allow the data to come into his system so that they can be used. He needs a minimum level of self-acceptance as an imperfect, changing, learning human being. A second dimension is what has generally been

called cognitive complexity — the ability to think abstractly¹⁵ and to develop complex rules for combining data from different dimensions into propositions about cause and effect.¹⁶ Without these abilities, a learner is usually inundated with the ambiguity and felt lack of relevance to the “real world” as he experiences a laboratory program.

DATA PERCEPTION

Finally, another important dimension has to do with style in perceiving the world — not how much one perceives undistorted, or how one combines these data, but *what kinds of data* the person can perceive. My basic assumption is that a learner in a laboratory session needs to be able to tune to internal, self-generated data from his internal world as well as the information collected about the outside world through his five senses.

This tuning to internal data has been called operating with “intuition”¹⁷ as well as sensation, and it is essential in generating contextual propositions about the relevance of data from the present situation and transferring learnings appropriately to other situations that do not have a one-to-one correspondence to the learning situation. This process suggests that a training laboratory may have data more useful for learning about dilemmas or issues rather than learning specific rules about what “should” be done in all cases.

Those who have the ability to look at an event and say, “I have learned about the major pulls on me in this kind of situation so I can gather data about this dilemma or choice in other places, like my home organization,” are more likely to become more effective consultants or clients through lab training. Those who say to themselves, “I’ve learned never to say *that* in a group again,” probably learn little of real process value in a laboratory. This process of perception and contextual generalization is discussed more fully in Steele.¹³

OTHER LABORATORY PROCESSES

Returning to the situation as a determinant of transferable learning about consultancy and change, we have focussed primarily on the basic T-group setting. Obviously the laboratory method is broader than this, and encompasses any kind of activity that generates behavioral data and legitimizes processing these data for learning purposes. From what has been said above, it seems obvious that learning for consultants and clients is enhanced by providing more kinds of in-role experiences in a laboratory. Many are already in use today: inter-group exercises; trust-formation and bargaining games; communication (one-way and two-way) exercises, and so on. The basic assumption is that it is possible to invent settings or processes that maximize learning that will be generalized to non-lab settings.

One of the latest steps in this direction is the “organization exercise,” where a total laboratory is used to create the dynamics and dilemmas of non face-to-face purposeful systems that are difficult for the T-group to contain. Sometimes these exercises are structured as to form of the organization, primary task, rules for relating to the environment, time scales, and so on. For me, the most interesting organization exercises have been those where no tools or organizational form was specified, only such general criteria as producing a product and having some differentiation of function and division of labor within the system.

As they go through the process of forming and developing the organization and operating it, many dynamics quite similar to back-home organizations are created, and it is possible, if you work hard at it, to draw some significant and impactful learning from the process. For example, in a number of exercises that I have participated in, staff groups have been formed which almost universally take themselves out of the “action” fairly early in the exercise to do planning and work with

themselves as a staff group, and thereby lose touch with the organization and what it is doing. In three different organization exercises I have seen self-styled staff units plan activities which they think will “help” the organization but when they come back to the organization to propose it they find surprisingly that the organization is already doing the thing they planned.

Another example is the degree of top-heaviness or management lump as compared with the actual productive force that tends to be created, for instance, in a producing organization of some kind. In one exercise for a religious group, approximately 70% of the members of the organization of 36 people was made up of either management or staff, with 28% actually producing and turning out the product which was the main task.

NEW LEVELS OF COLLABORATION

Often the training staff has a very difficult time intervening in the organization and helping it to learn about itself as it goes along — and I cannot think of a more realistic issue for a learning consultant to have to deal with. As a trainer to that process, how to intervene and be helpful, whom to help, what to help with, at what times, with what kind of time perspective, what role behavior, how to establish a relationship and expectations that are mutually shared and realistic, how to use power and where to get it, what to do with it, — all are consultant issues that the organization exercise can help generate between the clients and the consultants. It also provides a setting where there are consultant roles possible for participants, too, and not just staff. It is much harder to achieve in-role consultancy experiences for members in the traditional T-group.

The organization’s members, on the other hand, often learn about the kinds of resentment and anger they feel towards the “helpers” in the exercise (and to consultants in their home organizations) when they are “inter-

rupted" in the flow of getting something done with tight time constraints. The exercise often helps them see themselves as pushing away help when they most need it; and they see that they may be actually adding to the time it takes to do a task, and lowering the quality of the output, by simply getting something out they only think they have time to do without interruption from anybody else. Clients also get an opportunity to see that when they may be least able to use outside help is when they are having internal problems — just the time when they most need it, and that it would take conscious diagnosis and willingness to deal in the open with those feelings of resentment or rejection to get past that bogged-down point and move to a new level of collaboration with consultants or other people who might be of service.

SPECIFIC CONSULTATION LABS

Throughout this article, most of the examples of learning about consultancy have involved working as *staff* in the laboratories. This last example, the organization exercise, allows anyone to get in-role experience with change activities. A further extension of this has been the specific laboratory on consultation skills (such as those held by NTL Institute), where all participants presumably want to learn about the consulting process and themselves in relation to it. Our most successful (in terms of involvement, early learning being used later, thinking about and discussion of issues, etc.) programs to date have been those where we built opportunities for consultation experiences with real client systems (internal and external to the lab — one group consulted to the lab staff, another to the local town's police department) combined with attention to times for sharing and analyzing the experiences. This is, I think, one of the best uses of the richness that a laboratory can generate.

A further extension of these notions would be a consultation laboratory designed specifically for consultant-client *teams* to come as participants. This would provide the opportunity for work on lab-generated data (helping exercises, outside work, etc.) and on building the specific relationship between consultant and client. It would be a very strong force toward legitimizing discussion of here-and-now process, and would create a continuing laboratory process in the joint back-home change efforts. The formal laboratory would truly be the "commencement" that we want it to be, rather than an end in itself.

SUMMARY

I will not summarize all the points made at this point, except to reiterate several of the major themes. One is that the T-group, through being relatively manageable and immediate, may provide trainers and clients some very interesting and important clues as to what kind of dynamics are happening in the much fuzzier context of larger-scale organizations. One or two good ideas coming out of a laboratory may be enough to reorganize a whole new way of looking at some structural and dynamic problems in a particularly tough organization setting. The second point is that a particular kind of stance is needed by the trainer and by the participant to learn about the consultant-client process — one of some self-acceptance, dealing with complexity and fuzziness, and a willingness to know or look for the limitations to the kind of generalizations that can occur.

A third point is the power of using a variety of exercises as experiential data generators for learning about the process of organizations, organization change, and intervention in organizations, both from the standpoint of the consultant and the client. This process should be expanded, I think, and is a marvelous extension of the laboratory method to learning about issues of greater complexity than are possible in

a relatively undifferentiated and simply-structured T-group setting. The more we work at creating different modes and experiences in the laboratory, the more we are likely to provide learning environments for *different* types of people — environments where usable learning can take place that can be transferred appropriately to change in other systems.

Finally the thrust of this article has been that self-conscious *in-role* experiences — actual consultation, either to a T-group or other system, and actual client activity, either as a T-group member or as a member of another system — are most likely to generate data which are perceived, dimensionalized, and available for association to other places and times.

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ON ORGANIZATIONAL AND INDIVIDUAL GROWTH

Government organizations are the products of democratic institutions, but are not necessarily democratic in their operation. They are more likely authoritatively bound . . . and necessarily so. The agency administrator is responsible for all decisions made. This does not mean he makes all decisions. There is a difference between "responsible for" and "making."

Accordingly, enlightened administrators reserve certain decisions, delegate other decisions to subordinates, or join them in participative decision-making processes to the extent of the trust in and the capacity and level of their subordinates. Administrators train and strengthen subordinates where such decision-makers may have lacked experience, judgment, or validity.

By carefully distinguishing between "making" and "responsible for," such administrators thus release within their people the self-actualizing force so essential to creativity, innovation, productivity, and growth. It is only through effort (without waiting to be stimulated), through doing, through action,

and never through passive experience, that man (and his organizations) grow. To do otherwise, invites mediocrity, subservience, finally dreaded apathy and dry-rot.

As training directors move toward furthering total organizational development, one of our greatest challenges often lies in somehow altering an organizational way of life which may be contradictory to the above. What form or instrument of change we employ is the mark of a professional. Suffice it to say that knowledge, conviction, persuasion, strategy, logic, confrontation—even to "riding with one foot in the stirrup"—are employed by the true professionals of our craft—often with but minimal success.

Organizational succession, growth, and development are here to stay in our overall scheme of things as more important and successful individuals continue to embrace these and related concepts. The evidence continually mounts . . . it's possible if we want to . . . it is worth the stretch!

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