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Chapter 4

On becoming an internal OD consultant

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There is a large bunch of lilies on my desk.

The scent is intoxicating.

It is late and I play Chopin's nocturnes   (Nocturne no. 11 in g-moll is included on the CD).

I notice my sense of apprehension as I am trying to find a 'way into' writing about this phase in my inquiry. I had a difficult time at HPA. It all feels a long while ago now, and I have a sense of futility browsing through my HPA reflective diaries.

I want to pay attention to looking after myself as I engage with this material.

I had invited feedback on this chapter from Sarah, an ACL colleague, interested to hear whether it made sense to a person who did not know HPA. She commented that my experience at HPA seemed to have a 'Wagnerian' quality about it and appeared a 'quest doomed to failure'. In the current version of this chapter she felt that some of the 'thunder and anguish' had disappeared and that I seemed to have taken a rather detached view.

I think she has a point. In the process of crafting this chapter I have gradually, and consciously, edited out some of the more emotive language and detailed accounts of painful struggles.

Some of those editing decisions were made in response to feedback from my CARPP group, some happened in anticipation of putting this text in the public domain and exercising choice about what I was prepared to share with a wider readership. But most of all I believe I have achieved a healthy emotional distance from my experience at HPA in the process of reflecting on it and of connecting with a new community of practice. I have aimed to 'show' enough material to evoke what Sarah called the 'thunder and anguish', but to balance it with an evocation of how I have moved on.

Frame

In this chapter I aim to share my inquiry into becoming an internal Organisation Development (OD) consultant at the Health Professions' Agency (HPA). At the same time the crafting of this chapter is an inquiry cycle in its own right.

I start with giving an overview of the material upon which I base this chapter. In section 4.2 I offer some background information, so that you may orient yourself in the unfolding story. I give only few details about my employer in this account in order to preserve the anonymity of the organisation. Section 4.3 is devoted to the difficulties I experienced into negotiating my role and my inquiry into that process. In section 4.4 I describe various aspects of my role. Both sections are interspersed with reflections as I craft this chapter. I close with a further cycle of sense-making.

4.1 The material upon which I base this chapter

The material from this period (March 1998- March 2000) originates from a number of reflective cycles.

- From March 1999 – March 2000 I took a year out of CARPP, but continued my reflective diary writing
- There is the writing from the time of my employment at HPA, similar to the material I described in the previous chapter, and mainly consisting of reflective diaries
- After I had left HPA I sought feedback from ex-colleagues about their experience of working with me, which I captured in a reflective 'looking back' paper
- When I rejoined CARPP in 2000 I produced a paper for my CARPP group, making sense of my experience and inquiry at HPA
- I produced a paper about this period for the transfer from MPhil to PhD stage

I notice a different quality in the writing from subsequent cycles. Much of the material from after I had left HPA has a distinct feel of looking back with curiosity

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The sense of futility I mentioned earlier is, I realise, also present in the material I am working with. Psychodynamic literature (Halton 1994; Obholzer and Roberts 1994) invites us to pay attention to parallel processes, in which the consultant starts to mirror characteristics of the client system under review. Having been part of the client system, the risk of becoming drawn into the dynamics I am reflecting upon feels strong and I aim to pay attention that.
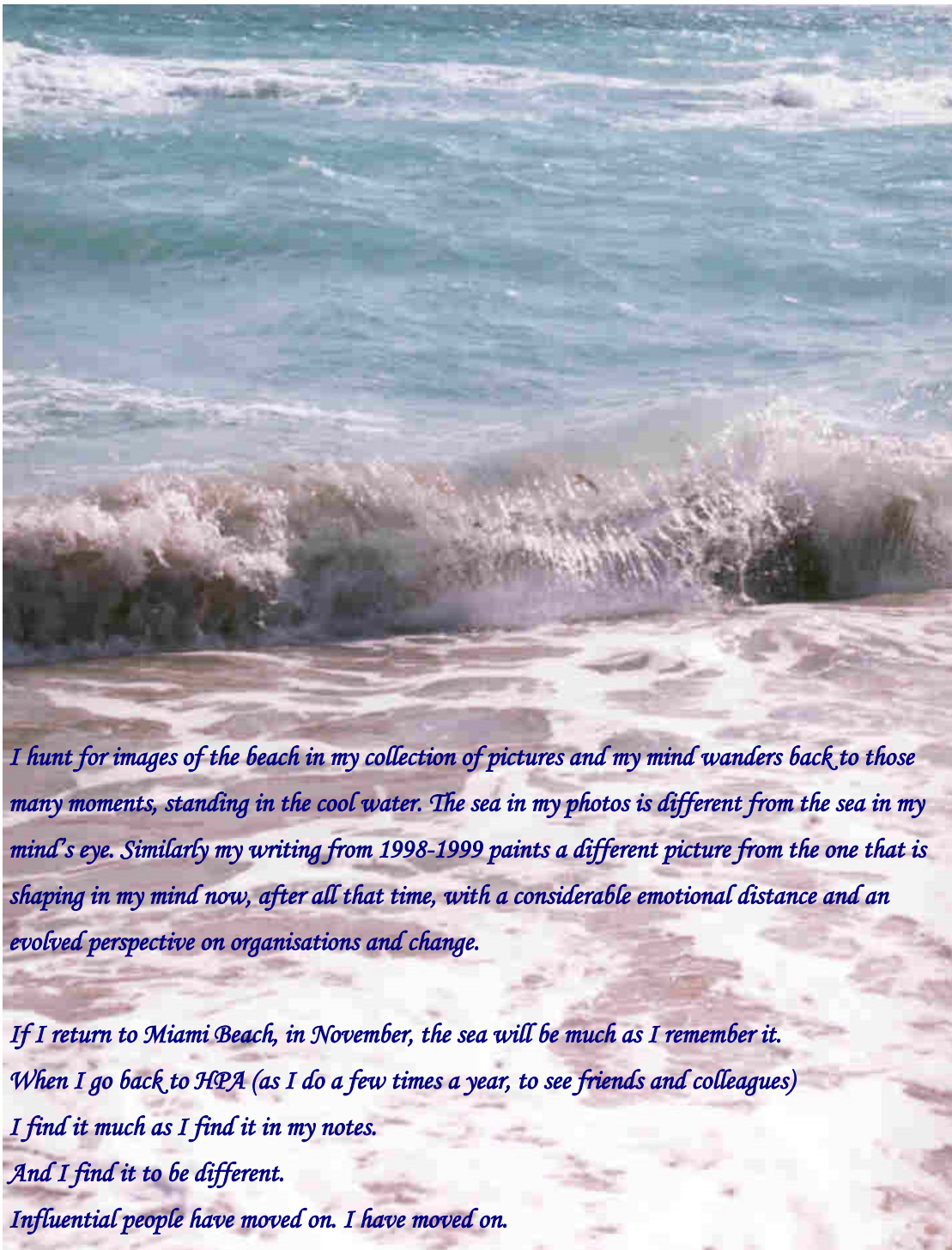
I hunt for images of the beach in my collection of pictures and my mind wanders back to those many moments, standing in the cool water. The sea in my photos is different from the sea in my mind's eye. Similarly my writing from 1998-1999 paints a different picture from the one that is shaping in my mind now, after all that time, with a considerable emotional distance and an evolved perspective on organisations and change.

If I return to Miami Beach, in November, the sea will be much as I remember it.
When I go back to HPA (as I do a few times a year, to see friends and colleagues)
I find it much as I find it in my notes.
And I find it to be different.
Influential people have moved on. I have moved on.

but also with some detachment. It is in sharp contrast with the 'presence-in-the-moment' in my notes from 1998-2000: the hand written notes and little drawings of the lay-out of a meeting room (who's sitting where, and the meaning I make of that; the atmosphere of the room), the emails, feedback from colleagues scribbled in the margins of an OD paper I produced for the organisation, the transcripts of tapes from my CARPP meetings, all take me back in time. The language is emotive: concern, hope, disappointment, anger, curiosity, sadness, and on occasions despair. I find myself oscillating between being drawn to this material, and being repelled by it, as old and difficult emotions are re-stimulated in the reading.

When I wrote a paper about HPA in 2000, I experienced the themes in my inquiry from that time as enmeshed, clear sometimes, and elusive too. I wrote in my diary:

May 2000
I notice that themes are really like waves: looking powerful and distinctive, and as I approach them, disappearing rapidly into the sea. It reminds me of the many times I have stood in the white sands of the Florida Atlantic coast, getting dizzy from staring into the water while I feel my feet sinking into the sand. Nevertheless, staring into the Atlantic always felt like a mind-expanding experience, so I'll keep looking for a while, suspending judgement of the value of the result.

This quote reflects my current experience well: I feel almost queasy looking back over my material from that period. Themes surface only to elude me when I come too close.

The theme that captures my interest is 'my role as a change agent' in various facets: different pieces of work I was engaged in, organisational dynamics and politics, coping with difficult interpersonal dynamics. Underlying that theme is an ongoing inquiry in 'what my role was really all about'. Other themes were equally present and are quite distinct:

- Aesthetics and their role in creating a good space for myself and my colleagues in HPA. Working with music and visual imagery.

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- Health, my own and that of my family. Looking after myself.
- Meditation, singing, Tai Chi as first person inquiry practices and as ways of taking care of myself.

Having expanded on the last three themes in the previous chapter I feel it suffices to say that they were ongoing. But it seems important to notice how my current 'energy' seems to have dried up around them, as if they have been exhausted, and it is with some difficulty that I pay attention to them as I meet them 'enmeshed' in inquiry notes. It is a pattern I have noticed in my inquiry practice at HPA: writing about themes often generated insight and energy, but once the writing 'was done', I moved on, my attention following the immediacy of the circumstances.

I have called that pattern 'my hop-scotching' approach to inquiry on occasions. Rather than full, elegant, sustained cycles – or spirals to capture the sense of deepening insight – I seemed to hop from one theme to another in my reflective diary notes. Themes did recur, but it was only over an extended period that a pattern emerged.

4.2 Becoming an internal OD consultant.
A little history.

In 1996, the year before I joined CARPP, I made the transition from the role of senior lecturer to OD consultant. I had been employed as a lecturer in Management and Marketing in the part of HPA which I will call the College, and which was engaged in research and delivery of academic qualification courses. The new director of the College, Lydia, was given the task of integrating the College's work, both on a geographical and functional basis.
Lydia asked me to take on a secondment with the purpose of supporting her with the integration task. I was keen to move on from teaching and into consulting and it seemed an ideal opportunity. I was delighted to accept. Lydia explained that I had been selected for the secondment because of my knowledge and expertise as a lecturer in management, my business experience in banking and previously as a

I find it enlightening to review my initial (OD) role in the light of Schein's models. I wonder whether, if I had known Schein's work at the time, and his critique of both models of consulting, I would have been able to notice the pattern that emerged and to take a different approach. I am not sure I would have. I had come from an expert role as a lecturer and much of my self-esteem was dependent on being able to provide answers to the questions I was asked. Both Schein, (o.c.) and Block (1999) comment on the seductiveness of trying to demonstrate one's expertise to the client early in the relationship. This is still true in my current work with clients, who often expect instant demonstration of expert knowledge and the speedy provision of workable solutions.

There were other aspects to this dynamic:

- *I had very little or no 'position power' in my role (Guirdham, 1995). It would have been easy for Lydia to send me back to my teaching role, which I would have regretted. Our contract, however informal, had been based on my expertise, and I suspect I felt compelled to be seen to provide that.*

- *My secondment had been somewhat controversial. There were big changes afoot in the College and many of my colleagues felt I had deserted them and were extremely challenging to me in my new role, which locked me further into 'having to prove myself'. The only way I knew how to do that was through taking up an expert role.*

manager in social services.

The way we constructed my role, very loosely it has to be said, seems to me now to be a mixture of what Schein calls 'The Purchase of Expertise' and 'The Doctor-Patient' models (1987; 1988). According to Schein the essence of the 'Expert' model is

> "that the client has made up his (sic) mind on what the problem is, what kind of help is needed and to whom to go for help. (…) Psychologically the message is "Please take the problem off my shoulders and bring me back a solution". (1987, p. 22 & 23).

> The Doctor-Patient model is a variation on the previous model "in that it gives the consultant the additional power to make a diagnosis and recommend what kind of information and expertise will solve the problem. (…) The consultants are supposed to find out what is wrong with any part of the organization and prescribe a therapeutic program, which often involves changing key people or reorganizing." (o.c., p. 24 & 25).

I found myself moving between the two models, with some difficulty. Typically Lydia would ask me for my opinion and diagnosis, and for recommendations (Doctor-Patient model). When I reported back with my views and suggestions for action, I would often find that she had, in the meantime, made up her own mind of what the problem was and what help she required from me (Expert model), or from others.

In the autumn of 1996, I was approached by David, Head of Human Resources (HR) and OD for HPA, who offered me a secondment in an organisation-wide OD role. It was an exciting opportunity to develop an alternative career (away from academia). By that time, about six months into my secondment for Lydia, I had become frustrated with the dynamic I described above (being asked for my 'diagnosis and prescription', only to find it overturned on most occasions). Working for David, a manager with a reputation for being non-directive and hands-off, would give me an opportunity to shape my new role, I thought. I did not heed the warning from a number of colleagues who had worked for David that I would find it difficult to

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achieve much.

By March 1997, I was sufficiently concerned about my role, and my perceived lack of contribution and impact, to seek help. I had joined a cross-organisational action learning set and had looked for courses on OD and Consulting. The enthusiasm of a College colleague for CARPP eventually tipped the balance for Bath University and action research.

4.3 Negotiating my HPA-wide OD role

I start this section with a note from my diary of 2003 and my reasons for paying considerable attention to the process of negotiating my OD role in this thesis:

24 July 2003
I have just shared the draft of the HPA chapter with my CARPP group. R. challenged me quite vigorously about the extensiveness of the piece about negotiating my role: "I can't understand why you spend so much energy on exploring your relationship with David. I could feel my energy draining out of me. Can't you accept political behaviour is part of organisational life?" Somewhat defensively I explained how the extensive attention I paid in this chapter to negotiating my new role, reflected the inordinate amount of energy and attention I had invested in it at the time and that I had tried to do justice to my inquiry and to incorporate current reflections.

Having reviewed the section, I believe it is appropriate to give it the space it is taking in this thesis for the following reasons:
- Negotiating the nature and boundaries of my role remained an issue throughout my work as an OD consultant at HPA. It was the dark undercurrent that I continually needed to navigate, and regularly got sucked into. Returning to that difficult episode from the present is an opportunity to learn, and hopefully to heal.
- In my current role I work with internal consultants on regular occasions. The issue of unclear contracts, conflicting demands, and internal consultants feeling

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marginalized, confused or powerless, are recurring themes in our conversations. My inquiry into my own experience has helped me to be alert to the difficult situation many of my clients find themselves in and to work well with them. Internal consultant clients have given me positive feedback on the extent to which I seem to appreciate their position.

- Every time I engage with a client I need to address the issue of contracting. It remains an important part of my ongoing inquiry.

In the remainder of this section I will

- tell you about a number of phases in the process of negotiating my role
- show you extracts of my reflective diary from 1997-2000
- share the meaning I am making of the dynamic in this cycle of inquiry, writing this chapter for my thesis. I indicate those passages with a heading "***Reflections***".

The early days

In initial conversations with David we rather vaguely agreed my role as "continuing my work for the College, and doing similar work for the rest of the organisation". It soon emerged that we had very different views on what that meant specifically, and that David was a more controlling manager than I had anticipated. I believed that, as a central service, we needed to *initiate* collaboration across the organisation, design organisation-wide processes for visioning, strategic planning, quality improvement initiatives (part of the OD remit), cross-functional collaboration and more. David, on the other hand, saw the role of OD as *responding* to requests for facilitating events, team building workshops, etc. I was concerned that David's approach was too piece-meal and reactive, and would not make any real impact on the way we worked in HPA. "Tinkering on the edges", I called it in my diary.

In my reflective diary notes I described my confusion about my role and my attempts to seek clarification and work collaboratively with David:

February, 1997
I had my first 'developmental review meeting' since taking up my role as OD adviser with David. (…).

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I invited David to explain what he thinks my role should be about but got no further than "supporting the organisation in its key initiatives, supporting the change processes, being the go-between for warring factions (my words)". I explained that I thought we should have a vision of the kind of organisation we would like HPA to be (I mentioned the concept of a 'learning organisation'), how we would like to work in HPA and what our values are. But David doesn't seem to think that's part of my task. Instead he believes I should focus on delivering specific projects and respond to requests for facilitation and support. I feel we need to be challenging as well as supporting, but I didn't get anywhere with that argument. We also disagree about my title. I had thought of OD consultant but David wants it to be adviser.
I've come away more confused than ever.

Reflections

- I appeared rather influenced by management literature with its emphasis on organisational vision and strategy; and by some of the learning organisation literature, including Senge's work in which a systemic approach, vision, challenging mental models and values take a central place (Senge 1994; Senge, Kleiner et al. 1995). Having made a recent transition from a role as a lecturer, with no previous consulting experience, I seemed at risk of becoming what McLean and colleagues have called an 'unintegrated' consultant, who works with a set of concepts and models gleaned from books and journals and has not yet found her own personal meaning in those ideas, nor a way of organizing them so as to make them compatible with her own personality and experience .

- According to Peter Block the point of maximum leverage for the consultant probably lies in the contracting phase (1999). In my enthusiasm for the role I had failed to establish any clear contract with David, or with anyone else in the organisation, with the result that difficult negotiations continued, without a resolution. Having said that, I tend to agree with Schein that in the early stages of a relationship neither the client nor the consultant have enough information to establish a clear contract. A better concept, according to Schein, might be 'exploring mutual expectations' (1999). As we experienced to our mutual frustration, David and I had failed to do that before I took up my role. The feedback meeting could have provided us with an opportunity but despite my

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intention to inquire ("I invited David to explain what he thinks my role should be about"), I swiftly moved into advocacy and did not seem to find a way to un-stick myself from it (Fisher and Torbert 1995). We seemed caught in an advocacy-advocacy loop.

- Schein (o.c.) further suggests that when the client fails to give the suggestions of the consultant a fair hearing, the consultant needs to treat this as a source of learning, rather than as a source of disappointment. The above diary extract, and the pages from which it is extracted, show clearly how disappointed and frustrated I felt.

- My job title (OD adviser) probably locked me even further in my 'Expert' model of consulting. Colleagues at HPA with an 'Adviser' role were experts in their field and their role consisted of advising professionals, organisations and the government on issues related to their area of expertise. My expertise, as colleagues and I saw it, was management, strategy, building and leading teams. Thus I was expected to deliver 'expert advice' to managers and to solve problems in their teams, with all the pitfalls Schein (1987) warns the aspiring consultant against.

- A spirit of inquiry offers the best overall protection to avoid communication breakdowns, hurt feelings and damaged relationships according to Schein (o.c). My inquiry practices during that period consisted mainly of keeping a reflective diary, sharing extracts from it at CARPP. When I returned to work I found it hard to keep an inquiring stance.

From secondment to permanent position

A next important moment in my OD role was transition from a secondment into a permanent role. I applied for the position and was appointed. A diary extract sets the scene:

August 1997

I've just been through a gruelling interview of two and a half hours. (…) I have accepted on the condition that we think much more strategically about the role of OD and my possible contribution to that. (…) My condition has been accepted, but I'm not sure how this bureaucratic, hierarchical organisation will cope with an internal consultant who challenges the status quo.

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(…)

L, an executive board member on the panel, asked me what I thought the key issue for the organisation was. I said I thought it was its inability to address conflict openly (Argyris and Schon 1974; Argyris 1994). David flinched. We have opposite views on the subject: he avoids conflict and is, on the surface, the soothing force, I take a much more challenging approach. I believe we all need to be prepared to critically address our own behaviour if we are going to get this organisation unstuck. Nevertheless, it feels good to have my role formalised. The support I received from the most unexpected corners has been heart warming.

Despite my protestations about my role as it was constructed at the time of the interview, and my assertion that I would only accept the formal role if it became more pro-active, nothing much changed following my appointment. By then it was clear I did not have a job in the College to go back to, so I was left with three undesirable options: put up with an ill-defined role which I was less than happy with, continue to advocate for a different role, or leave. Foolishly perhaps, I pursued all three strategies:

- In 1998 I contacted a number of employment agencies. I gave up the demanding search for a new job when I was told my mother was terminally ill (February 1999), and stayed, unhappily, at HPA. Despite my frustration with my work at the time (putting up), I still feel deeply grateful for the personal support I received from friends and colleagues, including David, at that difficult time.
- I continued to advocate for a more pro-active role. It was to no avail and only seemed to make matters worse.

Reflections

- The pattern I describe above seems to be uncomfortably similar to what Argyris describes as "escalating commitments to failing courses of action" (Argyris 1992), or what Watzlawick calls a "More of the Same" type solution that results in aggravating the problem (Watzlawick, Weakland et al. 1974):

  > "In real life, although some human problems may continue at a steady level of severity, many difficulties do not stay the same for long, but tend to increase and escalate if no solution or a wrong solution is attempted – and especially if

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It seems obvious now, that I was trying 'more of the same' and that it only made matters worse. I was aware of that at the time, and wrote about it in my diary. To find a 'second order' strategy was (and still is) a different matter altogether. Despite my frustration, and, on occasions, despair, I was curious about the unfolding dynamic, and brought the issue to my CARPP group, as a subject for inquiry.

more of a wrong solution is applied" (o.c., p. 32, italics in original). Watzlawick and colleagues use Group Theory to explain how some strategies for resolving a problem are counterproductive because the attempted solution is of the wrong order: first order change is ineffective because the system's structure itself has to undergo change, and this can only be effected by second order change. They give the example of an insomniac trying ever harder to get to sleep, to illustrate the pattern.

They point out the persistent nature of 'first order solutions': "It is odd to see how on the one hand the absurdity of this type of solution becomes patent, while on the other hand this form of change is attempted again and again, as if those responsible for bringing about change were unable to draw the necessary conclusions from history" (o.c., p33)

- Where I seemed to be stuck in a "trying more of the same" strategy, David's pattern, on the other hand, appeared close to what Watzlawick and colleagues call "The Terrible Simplifications":

  "(…) the typical formula involved here is: there is no problem (or, at worst, it's merely a difficulty) and anybody who sees a problem must be mad or bad – in fact, he (sic) may be the only source of whatever difficulty is admitted. That is, denial of problems and attacks on those either pointing them out or trying to deal with them go together. (…) This compound of denial and attack depends upon gross simplification of the complexities of interaction in social systems and, more generally, of our modern, highly complex, interdependent and quickly changing world. This stance can be maintained only by refusing to see this complexity, and then defining one's tunnel vision as a realistic and honest attitude towards life, or as '"hard-headed sticking to the facts" (o.c., p.40-41). "First and foremost among the reasons for the denial of problems is probably the need to maintain an acceptable social façade" (o.c. p.42).

There are many instances documented in my diary that appear congruent with the idea of 'Terrible Simplifications' on David's part. I give an illustration:

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Friday, thank God it's Friday (September, 1998)

Laura came to see me today. She's been trying to get contracts for new members of staff organised for months. It's been going on for so long now that two key new staff have threatened to leave. She was desperate. She'd had a conversation with David, explaining the problem. HR is his responsibility after all. "I think he understood the urgency" she said, "I was very angry, I think I got through this time". "Oh no", I thought, "that will be counterproductive". In our Friday evening gossip meeting (my frustrated terminology), I mentioned staff contracts. "Oh yes", said David, "I had Laura in hysterics in my office this afternoon". I asked whether he thought she had a point. He smiled that smile I fail to read. I don't think anything will happen, as usual. It's a joke now, with HR colleagues: Kathleen and her 'what are we going to do about it?' I feel powerless. Geoff was right, but I can't seem to accept it.

Note:

The Geoff I refer to is Geoff Mead, now Doctor Mead, and a CARPP colleague, who was in one of the early learning sets (summer 1997). I had brought my inability to work effectively with David to our CARPP meeting, seeking others' perspective and hoping perhaps that I was missing an obvious strategy. Geoff had stated firmly that I should stop trying and accept that I would not be able to influence David. I often thought back to that meeting, but as I explained earlier, found it impossible to stop trying harder when there was so much appeal for help from colleagues in HPA.

- The Karpman Triangle offers another interpretation of the dynamic described above (Stewart and Joines 1987). I seemed to construct David as a Persecutor and myself as Victim. Moving around the Triangle, I constructed myself as Rescuer of the organisation, and, in my diary writing, as Persecutor of David.

Returning to the story

My OD role was further compromised by David's unwavering – and in my view uncritical - support of the Chief Executive, Margaret, and his close relationship with Brian, a member of the executive board. From inquiring conversations (sensitively conducted) with colleagues at HPA I learned that people were reluctant to address

I listen to Michael Chance's 'Nisi Dominus' from "The art of the Counter Tenor" because of its soothing and serene quality. I have mixed feelings writing this. Old anger and powerlessness resurging. Guilt too, for a felt lack of loyalty. I still meet David on occasions and enjoy his company. He has a gentle and humorous quality that I truly appreciate. I remind myself that my solution (Trying Harder) was as ineffective as his (Terrible Simplification). This writing is not about judging the key players, it is about exploring, from a place of unconditional positive regard (Rogers 1951), a dynamic that went nowhere. At the time I did feel judgmental. I felt my values were being violated. Now I think of the dynamic as two people trying their best in a difficult situation, locked together in a dysfunctional system.

I still notice myself 'trying harder' with clients. I regularly come across a 'terrible simplifications' pattern too. It still triggers a judgmental response in me. But as an external consultant I have the option of walking away.

issues involving those two powerful players openly in David's presence. Much of our work involved either or both of them, directly or indirectly. People's avoidance to raise issues contributed to the ineffectualness of our OD role.

(After I left HPA I discovered that many of my colleagues had been wary of me in my role, because of my connection with David. What they said in my presence was sure to reach Margaret or Brian eventually, they had thought. I had not been aware of that at the time. One manager, to my relief, re-affirmed what he had told me when I was working with him and his team: he had trusted me unconditionally, and knew what he told me in confidence would stay between us).

Colleagues' warnings did not stop me from challenging David about what I described as his collusion with Margaret. "How can we change any of the dynamics in this organisation", I asked, "if you, as Head of OD, are not prepared to challenge behaviour at the very top of the organisation?" I drew a picture of the organisation as a web of relationships and power, with Margaret and David at the very centre. If we were going to change this organisation, then that picture had to change, I claimed. Why would David want to dilute his power? "Good question", he said, and that was that.

In my CARPP group I explored the boundaries of my relationship, and of my responsibility. I found support and challenge: was I taking care of myself in this stressful relationship? Did I know how to protect myself? What was the impact on my health and how was I avoiding making myself too exposed? I had always taped my CARPP meetings, but during that period I transcribed all the tapes, highlighting sections related to "staying well in a sick system" (as I called it in the CARPP4 meeting of 6 May, 1998). I wrote some of the suggestions about how I might look after myself in my work diary as a regular reminder of how I intended to conduct myself.

I also searched the literature for ideas. Publications on systemic approaches (O'Connor and Mc Dermott 1997; Senge 1994) helped me to understand how I was caught in a reinforcing loop: the harder I pushed more David pushed back, the more our relationship deteriorated, the more stressed I became, and the harder I tried to

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change the situation. I knew I had to change my influencing style, or give up trying. Since the latter solution seemed incompatible with my values, I looked for ways to change my influencing approach in various works about negotiating skills (Fisher, Ury et al. 1981; Richardson 1987; Laborde 1994). I explored writing about organisational politics and bullying (Stone 1997), (Randall 1997). I even undertook a three day Neuro-linguistic Programming course on influencing (Charvet), using my relationship with David as my case study. Unlike other influencing theories it helped me to pay attention to patterns in *how* David and I constructed our map of the world, rather than *what* we were trying to achieve, and to match my influencing style to David's patterns. In my exit interview David commented on how he perceived a shift in our relationship around that time. I quote from my diary transcript of our conversation (April 2000):

David: "You challenged me. You used to get on my nerves, I'd sit there and think: "You have no idea. But later you became really skilled and you'd make me think. I do miss that now."
Me: "Not that I felt it made any difference."
David: "Oh, but you did. You really touched people, and you touched me. You really made me think and on occasions change my mind".

Torbert and Fisher's developmental frames (1995) provided another inspiration for further inquiry. The model is based on the assumption that we are bound by a central, and usually implicit frame, during any given period of our lives.
  "It is this implicit frame that most severely limits our effectiveness. (…) If we can become aware of these overarching frames in others and in ourselves, we can reduce unintentional conflict and misunderstanding and can even help ourselves and others to transform beyond the limits of our present assumptions" (o.c., pp. 59-60).

Since Fisher and Torbert's early work the model has been developed and comprises of Impulsive, Opportunist, Diplomat, Expert, Executive, Strategist/ Leader, Magician/Witch/Clown and Ironist frames (Rooke and Torbert 1998).

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I am conscious and wary of the seductiveness frames have for me. I enjoy working with the Myers Briggs Type indicator, for instance. I like to treat models as an invitation to make sense of my experience from a particular perspective, someone else's, and start to notice things I may not have paid attention to before. And I like to use different frames and notice the different facets of reality they bring to the fore (congruent with a constructionist perspective). Frames are only ever one description of reality. If used wisely, I find them helpful.

In her feedback on this chapter Sarah, my ACL colleague, suggested the model seemed a 'bit tidy'. She wondered whether our collective enthusiasm for applying it to our experience of HPA was a means of bringing some order in a messy situation . I think that was the case. Hirshhorn (1999) would have called it a 'defence against anxiety' strategy.

The frames are ordered hierarchically, with an individual's world growing larger and more complex at each succeeding frame, and his/her understanding of and acting in the world becoming more sophisticated. It suggests that we can achieve personal transformation through inquiry.

I made use of diary notes describing interactions between David and myself to place both of us in the framework.

I experienced David as operating from a Diplomat frame, with the following characteristics:

"Observes protocol; avoids inner and outer conflict; works to group standard; speaks in cliches, platitudes; conforms; feels shame if violates norm; sin = hurting others; punishment = disapproval; seeks membership, status; face-saving essential; loyalty to immediate group, not to 'distant' organization or principles; positive ethic = nice, cooperative" (o.c. p. 16).

I thought myself to be operating from an Executive frame, with some relapses to the Expert:

A person operating from an expert frame is described as
"Interested in problem-solving; seeks causes; critical of self, others based on craft logic; chooses efficiency over effectiveness; perfectionist; accepts feedback only from 'objective' craft masters; dogmatic; values decisions based on merit; sees contingencies, exceptions; wants to stand out, be unique; positive ethic = sense of obligation to wider, internally consistent moral order" (o.c., p.16).

A person operating from an executive frame has the following characteristics:
"Long-term goals; future is vivid, inspiring; welcomes behavioural feedback; effectiveness and results oriented; feels like initiator, not pawn; appreciates complexity, systems; seeks generalizable reasons for actions; seeks mutuality, not hierarchy, in relationships; feels guilt if does not meet own standards; blind to own shadow, to the subjectivity behind objectivity; positive ethic: practical day to day

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improvements based on self-chosen (but not self-created) ethical system" (o.c., p.16).

It was an uncomfortable, but enlightening exercise. I shared the model with a number of trusted colleagues at work and we attempted, with considerable humour, to place ourselves in the model. My colleagues agreed with my assessment of myself wavering between Expert and Executive. It helped to make sense of my behaviour and that of others, including David. I aspired to develop abilities related to other frames: e.g. finding creative resolutions to conflict and maintaining an awareness that my perception was dependent on my map of the world (Strategist). Again my CARPP group was ready to challenge the use of models and to remind me of the risk associated with 'boxing others and myself' in a model, which was after all someone else's construction of reality.

I agreed with my CARPP group's challenge and had some further doubts. The model implies that we operate from a particular developmental frame, at a particular stage in our lives, across different contexts, which I thought questionable. At the Action Research Conference in Stroud (September 1998), I raised my question with Bill Torbert. From a social constructionist perspective (Gergen 1999), I argued, it would make sense that people may operate with different levels of sophistication depending on the environment in which they find themselves. I contrasted my behaviour at work with my more mature relationship with my family as an example. Bill agreed, I think, that the research underpinning the model had been conducted in the context of 'people in organisations' but I am still unsure as to whether he was prepared to consider the model context-specific. He also invited me to think of HPA's frame, as he experienced organisations too as operating from a particular frame. I had some difficulty thinking of HPA as 'one organisation' in this context and found I would ascribe different frames to different groups and departments, and especially individuals. If I had to choose one for the entire organisation, I decided it would have to be Diplomat, because of the extensive conflict avoidance behaviour.

I have considered including the paper in an appendix, but it is full of references to the organisation and its role, which would make it impossible to disguise the organisation's identity. So I decided against it.

The OD function expands in HPA.

In January 1998, the CEO agreed that David could devote all of his time to OD, and that we were allowed to second another member of staff to OD. Kenneth, joined OD in February 1998. In our early conversations as a brand new 'unit' I suggested we inquire with colleagues into their expectations of our role.

23 February 1998

Today was our first meeting of our new unit. I organised 'real' coffee and croissants, in the spirit of a nurturing start. (..) I mentioned to David that people seem unsure as to what OD stands for in the organisation and that I would like to engage with colleagues in an inquiry about how we can best contribute to the organisations' work. He was not keen. Too mechanistic, he thought. Kenneth supported me. OD is an elusive concept in HPA and to engage people in thinking what it really means and what they would like it to be would be helpful. David wants 'a launch' of the OD unit in May but agrees we can circulate a discussion paper beforehand, for feedback and to generate a debate at the launch. It wasn't quite what I had in mind, but I hope it can be the start of an organisation-wide inquiry and ultimately a shared perspective on OD.

I drafted a paper for discussion with my OD colleagues, outlining my perspective on OD and the values upon which I aimed to base my work. I had intended it for our team and written it in the first person singular.

April 1998

David sent me feedback on my paper today. By fax. "This is a truly excellent paper. I'm not sure 1st person is right. Also, somewhere it needs to refer to the development of the work agenda." I'm not sure exactly what the latter comment means. Perhaps being more specific about the initiatives we will be engaged in? I would like us to discuss it, and the implications of what we are saying, before it goes to a wider audience. But I'm glad it was well received.

Following David's feedback I distributed the paper, as instructed, to the executive team members, to some critical friends in the organisation, and to my CARPP group without any changes, except for substituting first person singular by first person

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plural. Looking back it seemed not the appropriate way forward:

- I had written a personal and emotive paper. I was prepared to take ownership for its content. To offer it to others in the organisation as if it represented a shared view was inaccurate and by doing so I missed the key purpose for writing it: to start a conversation within the OD unit, and clarify our different views.
- The paper is full of models (academic speak as one of my critical friends called it), which I had wanted to share with colleagues to spark off an exchange of views.
- I missed an opportunity to narrow the scope of our work and to share our intent with the organisation. Although the paper has a heading "What we do" it describes more HOW we/I intended to work: taking a project approach, balancing advocacy, inquiry, framing and illustrating (Torbert 1991), and working with both staff and non executive board members. The inclusion of Torbert and Fisher's model is a particularly good illustration of how this paper was meant as a draft discussion document for my OD colleagues, who were familiar with the model, rather than as a paper for distribution.
- Much of the paper is written from my experience of working across the organisation, in a spirit of defiance.
- The section on 'Values' was written as an advocacy on how I wanted to work. Again, intended for sharing with my OD colleagues rather than for further distribution. It sparked a flurry of comments from the people who returned my paper with comments. I show my values summary and some of the comments

- Encourage individuals (and groups) to value themselves and others, and to value the *difference* each of us brings to the organisation.
- Increase individual and organisational learning by generously sharing the skills and knowledge we bring to any occasions and encouraging others to do the same.
- Encourage 'interdependence' in a climate where individuals take responsibility for their own actions and positively support others to do the same (Covey 1992).

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Some of the feedback I had on the above:

- Are you serious? So you are going to work against the grain and culture?

- You mean to cut right across the beliefs and values of the organisation?

- I agree, fully. But I think this is only possible in small pockets of the organisation.

- I think you're going to find this hard going Kathleen. Remember to watch your back.

- This is how I aspire to work too. I do find I get hurt in the process. Are you ready for that experience too?

Reflections

- On the whole the paper strikes me as well-intentioned, but rather naïve and idealistic. In being explicit about 'how I wanted to conduct myself in my role' I had hoped to engage a conversation about our role with OD colleagues.

- Although I had 'advocated an *inquiry'* with colleagues, I did not model inquiring practice much during the whole episode. When David decided we would have a '*launch'* instead, I did not take the opportunity to explore his purpose, his thinking behind it, whether his strategy was congruent with his aim, how he intended to conduct the launch meeting (Torbert 2001). When meeting resistance to my proposed way forward, I seemed to lose heart and agency (Bakan 1966). Rather than continuing to work towards an outcome I felt at least reasonably comfortable with, I 'did as instructed', from what appears to be a Victim position. The game I seemed to, unconsciously, set up is called in TA "Now I've Got You, Son of a Bitch" (Stewart and Joines 1987 p. 252). By complying with what I considered an ineffectual approach I set up a situation in which I could afterwards say: "I told you so", effectively switching to a Persecutor position and avoiding dealing with the issue (Hay 1986).

- Circulating the paper did start a series of conversations with colleagues. As a result, some colleagues I'd had little or no connection with before, became more engaged in the OD work, and became new critical friends. So, in a roundabout way, the paper did generate some of the inquiring conversations I had hoped to

Sarah was struck by the presence of music in this chapter, and wanted to know whether I had worked with the music I had mentioned in my diaries when crafting this chapter.
I did start to work with the same music, but found it became an 'anchor' (Knight, 1995), taking me right back to in time. Choosing different pieces by the same composer, or the same piece executed by a different musician enabled me to create some distance from the past, and a more generative space for myself.

initiate.

The launch of the OD unit

In June 1998 we 'launched' the OD unit. Attendance was by invitation from David only, which cause quite a stir among some of the people who had not been invited. At the event David presented the various strategic initiatives at HPA, framed as a reason for the expanding OD function. I re-iterated our 'value' statement from my paper, and invited feedback and dialogue. Much of the feedback related to people's confusion about what exactly we were going to *do* and what decision making powers we had in relation to the strategic initiatives. We positioned OD as facilitating processes, rather than making strategic decisions. A considerable amount of challenge ensued about the extent to which OD would contribute to genuinely changing the culture of the organisation – as aspired to in our value statement - rather than merely colluding with the existing culture. The disappointment in the room was palpable. I wrote in my diary:

6 June 1998

Travelled back from the launch with a heavy heart. I met Judith for lunch. She had been disappointed with the event, and felt no more clear about what OD was all about then when she came. I had to agree. Brian had apparently commented to Judith that 'this OD outfit was not going to hold him to account'. It wouldn't surprise me.
I feel afraid on days like today. I worry how far people will go in pursuit of their own agenda.
I play Bach as an antidote to my confusion and sense of darkness.
What am I afraid of? People have been badly treated by this organisation. Some look a shadow of their former selves. Some people have left. Some seem to have lost their confidence to face the uncertainty of moving on. Better the devil you know… Some people keep battling on, trying to effect change, others try to work with integrity at the edges of the system. That seems to be easier when one has a defined area of responsibility, or one's work is outwardly focussed. Not sure what my strategy will be. Moving on will be part of it at some stage. In the meantime I need to continue to look after myself, as my CARPP group keeps reminding me. I do believe in the contribution this organisation can make. I do like and admire some of my colleagues

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Stacey (1996 c) argues that any organisation can be thought of in terms of 'legitimate' and 'shadow' systems. He calls the ordered network of patterned inter-actions, which is intentionally designed, the legitimate system. It consists of the or-ganisation's hierarchical structure of roles and responsibilities, official policies and processes and it espoused ideology. At the same time as interacting in the legitimate system, people spontaneously develop networks through self-organizing processes, which he calls the 'shadow' system.

very much. How can this organisation be so dysfunctional when there are so many of us who would like it to change?

The impact of the 'launch', as far as I could tell, was increased cynicism about OD. The event and its impact were not further discussed in the OD team, despite my repeated attempts to do so. From now on, said David, it was business as usual, only with a stronger team. I tried to work with integrity or to avoid assignments where I thought that would be impossible.

Reflections

Looking back, after six years, the situation appears to me as hopeless as I experienced it at the time.

- Informed by management literature, I was prone to advocate a structured approach to our OD work. In my diaries I wrote about 'managing' change, creating a shared vision, about strategic implementation, approaches to change Weil (1998) and Shaw (1997) associate with traditional OD practice. I advocated the need to work with the organization's legitimate system. David, on the other hand liked an informal approach, was a master at working in the shadow system, and preferred to rely on his network to exert influence. Paradoxically, on the one occasion where I had advocated an informal approach, hoping to open up a dialogue with colleagues about OD, David opted for a formal, by invitation only occasion, with power-point presentations followed by a question-and-answer session.

- At the launch I was taken aback by the overt power play of one of the board members, who stated quite openly that "decisions are made on the back stairs, you might as well learn to live with that" and that he had no time for my advocacy for more transparency. I could have appreciated the fact that someone was at least prepared to be open, rather than paying lip-service to values he had no intention of living by. Instead I was shocked and dismayed. Rob, my colleague from CARPP6, was right in his observation that I was unable to accept the political nature of organisations, patterns of conflicting interests and power play (Morgan 1997). I had a well-intentioned, but naïve view of organisations and of OD. The values I articulated in my OD paper, and brought to the launch meeting, were close to the ones described by French and Bell as underpinning OD:

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In a mood of light-hearted appreciation I play 'Gershwin plays Gershwin'.

> "(…) humanistic, optimistic, and democratic. Humanistic values proclaim the importance of the individual: respect the whole person, treat people with respect and dignity, assume that everyone has intrinsic worth, view all people as having the potential for growth and development. Optimistic values posit that people are basically good, that progress is possible and desirable in human affairs, and that rationality, reason and goodwill are the tools for making progress. Democratic values assert the sanctity of the individual, the right of people to be free from arbitrary misuse of power, the importance of fair and equal treatment for all, and the need for justice through the rule of law and due processes" (1999 p.62).

I still hold humanistic and democratic values, but I have come to accept the limitations of rationality, law and due processes and I am learning to work with those limitations. I think I am less blind to my own shadow (Rooke and Torbert 1998).

In the next section I describe various aspects of my role and attempt to give a flavour of my attempts to make a contribution in difficult circumstances.

4.4   My work as an OD Adviser

I aim to create a picture of the main aspects of my role at HPA, bringing them to life with short diary extracts. I intersperse the picture with reflections.

When challenged by an HPA colleague about what 'we actually did' in OD, I gave the following answer:

July 1999

Daniel asked today: "What do you actually do in your OD work?" I know the question was intended as a challenge, but I decided to treat it as a question for information. In no mood to get hooked into a lengthy argument I replied roughly as follows:

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"I imagine you'd get as many different descriptions as people answering your question. In my mind I also make a distinction between what I aim to do and what I think I achieve… What I try to do is support the organisation in its work. In practice that means supporting (and challenging) individuals, groups, departments, and projects across departments in delivering their current work or in developing a strategy for the future. What I actually achieve you will have to ask the people I work with.

"I see," he said, and that was the end of our conversation.

I will use the above description as a basis for this section and discuss the following:

- Coaching colleagues
- Working with groups and departments, including facilitating teams, facilitating action learning and management development
- Facilitating cross-departmental projects

Not all of my work is equally well documented in my reflective diary notes. I had a tendency to concentrate on what I experienced as challenging and difficult.

4.4.1 Coaching colleagues

In February 1998 I had a chance conversation with Gerry, a colleague who had recently been appointed to head up a large and prestigious project. I had noticed her in the staff restaurant, looking rather stressed. We had only met on a few occasions before but enjoyed each other's presence. Gerry was struggling in her new role, and in need of support with planning and facilitating workshops and feedback on her interventions, as well as more general coaching. She was keen to work with me and I asked David for permission to support her in her new role. We would decide on how I would do that as we went along. To my delight he agreed.

I ran workshops for Gerry and facilitated some of her groups when the need arose, but my main contribution consisted of observing her in her work, offering support, challenge, and on occasions advice.

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I share one of my diary entries about an unexpected successful coaching intervention:

July 1998

Gerry phoned. She was pleasantly perplexed. She met Frances today and described how she had managed to stay resourceful, and calm, rather than becoming judgemental and irritable. "And I don't have to actually like her to work with her, do I?" she added. Wonderful. I hadn't expected quite this outcome from our late night work the other week (in another of these ghastly cheap hotels. Gerry and her budget!). We'd spent most of our dinner discussing the dynamic with Frances. I'd been trying to explain that Gerry was part of that dynamic and could change only her contribution to it, no matter how much she wanted Frances to change. We kept coming back to the 'yes but how question'.   I invited her to try a 'changing perceptual positions exercise', (one of those NLP tricks, where you put pieces of paper on the floor, representing the person's own perspective (first position), the other person's perspective (second position) and a neutral outsider (third position). I had Gerry stepping from one perspective into the other, until we were both exhausted. Can you picture it: two women in a hotel room, earnestly stepping between bits of paper on the floor? By midnight we called it a day. I was not convinced we 'got there', but obviously I had underestimated Gerry, or the power of the exercise, or my ability to coach her through it well enough, or all of those.

In the process Gerry became my most important critical friend at HPA. Open to my support and challenge, she was also ready to return the favour. I trusted her completely, and at most of our meetings we also discussed my work. Being an experienced health care professional, Gerry helped me to understand the dynamics of the client systems (health care providers) her project was supporting, and the parallel patterns she noticed in HPA.

Gerry's positive feedback gave me the confidence to agree to other coaching requests in HPA. Those were formal relationships with regular, two hour, meetings and progress reviews and they were mostly quite narrowly focussed on specific work issues. My coaching clients were managers in HPA, and I regularly ended up working with their teams, as part of my OD role. This had the advantage of seeing those

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Client: **Date:**   **Time:**   **Location:**   **Issues discussed:**   **Follow up actions**:   **Reflections:**   How did I conduct myself in the meeting? (Advocacy/inquiry balance?)   How did I feel?   Quality of rapport? – Evidence?   Issues arising for OD?   Concerns?   What have I learned?   What do I want to pay attention to next time?

Figure 4.1 My coaching 'reflection sheet'

managers 'in action' and being able to draw on my observations in our coaching meeting, but it also created issues of boundaries and sometimes of confidentiality. Confidentiality was also an issue because of my reporting relationship to David. 'Total confidentiality' (say nothing about what you discussed) was easier said than done. I knew that my perspective on organisational issues was sometimes changed or reinforced by my coaching work with individuals, and had concerns about how that might leak out in my conduct in OD meetings or with David. On occasions I found myself in a moral dilemma: e.g. how to deal with bullying or harassment that surfaced in a coaching conversation? I discussed my concerns openly with my clients, who seemed reassured by the fact that I raised them. We agreed on what my clients wanted me to share, whether there was any action they wanted me to support (eg. making a formal complaint) and what was strictly confidential.

My inquiry into my coaching practice consisted of seeking feedback from my clients after every meeting and in our progress reviews, and adding reflective notes to my coaching files (see Fig. 4.1). My files were strictly for my own use, and contained a set of questions to prompt my reflections. I did not necessarily address the questions, but wrote down whatever impressions, concerns and further questions I had from the coaching meeting – much as I did in my diary.

In the summer of 2000 I returned to HPA to seek feedback from my ex-clients about my work. Some of my ex-coaching clients sent apologies. How they thought about my coaching skills, or lack thereof, I will never know. Two comments stand out from the feedback I received from clients I did meet:

- Martin told me how he had initially been concerned about confidentiality, but had felt reassured when I raised the issue. The fact that he had felt safe enough to share a seriously controversial incident involving a member of the executive board had been an enormous relief from what he had experienced as a grave burden.

- Colin talked about having a sense of 'safe space' in our meetings, which he described in terms similar to Alan Philips' (1994) use of the word: "a bounded area of our existence where we feel protected from the world we live in."

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Reflections

- I embarked on coaching work without having experienced coaching for myself, any prior development of coaching skills, or any supervision; making it up as I went along, much as I did with much of my work at HPA. My NLP training stood me in good stead, but I have since had extensive supervision and found some interesting frameworks. Myles Downey's work (2003) in particular made me aware of the value of non-directive coaching and the directive nature of much of my coaching at HPA. Having said that, I want to honour my brave attempts at responding to requests for help and the value my clients claimed to have found in our coaching relationship.

- David considered coaching much like having a good conversation, and something I ought to know how to do intuitively. According to Joyce Fletcher (1994), work that involves people, caring, management of tension and emotionality tends to be associated with the private sphere and is often rendered invisible in commonsense definitions of work and competence in the public sphere. According to Fletcher, skills required for work associated with the private sphere are thought to be innate, and the work involved is considered straightforward. I suspect I held that I held the same view, albeit unconsciously.

- If most of my coaching was directive in nature, my coaching relationship with Gerry was of a different quality. At the heart of our robust and humorous challenge and nurturing support was a desire for mutual growth and development (Fletcher, o.c.). My work with Gerry offered a 'back region' (Goffman 1959). According to Goffman people engage in impression management as they enter the presence of others, they offer a performance. 'Front regions' are those spaces where people perform. 'Back regions' are the informal places where they can relax, drop their front, engage in small talk, stop performing or prepare for their next performance. Goffman introduces the concept of 'team mates': colleagues who share the same role, and with whom we can talk when we go back stage about our work. Paradoxically I found that space with one of my 'clients', rather than with my colleagues on the OD team.

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4.4.2 Working with groups and departments

My work with groups and departments was varied. A few themes emerged from my diaries (1997-1999): facilitating teams, facilitating action learning groups and management development. I discuss each of them in turn.

Facilitating teams

I frequently received requests from managers to help them improve the dynamic in their teams. Those requests were usually one of two kinds: either the manager felt clear what the issues were and expected me to design and facilitate an event that would resolve them – in line with Schein's 'expert model' (1987), or they expected me to offer a diagnosis as well as implement a solution – what Schein calls the 'doctor-patient' approach. In an exploratory conversation with the manager we decided the best course of action. On occasions we'd agree I'd support the manager in addressing the issues him/herself (leading in fact to a coaching contract). Other times I agreed to work with the manager and his/her team. Sometimes, I was instructed by David to work with a team, even if that was against my better judgement.

Contracting for these interventions was not straightforward. Managers often expected that one 'event' would resolve difficult dynamics that had developed over years and change behaviour that was deeply ingrained. Sometimes they were unable or unwilling to see their own contribution to the problem and their willingness to reflect and perhaps change their approach was not always evident. Initially I would 'deliver what was asked' and give it my very best. From my 'expert consulting' frame (Schein, 1999) I was glad to be asked and keen to provide an answer. As I gained confidence and experience I started to challenge the manager's frame of the situation, invite them to reflect on their contribution to the problem, and engage the team members in seeking a way forward.

Working with different departments across the organisation I began to notice recurring patterns and to understand how some of the dysfunctional behaviour being played out within one team was part of (or driven by) an organisation-wide pattern

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(O'Connor and Mc Dermott 1997), as illustrated in the following diary extract:

November 1999

I've been working for a while with Lucy's team. Just as we seem to turn a corner, something happens and we're back where we started. It's depressing. On this occasion it was a decree from above which took me as much by surprise as it did Lucy and her team. (I omit details for reasons of confidentiality). We had worked together on service quality issues, taking the opportunity to explore the way team members work together, issues of inclusion and collaboration, openness and transparency. The latest 'decree' (as Lucy called it) came as a total surprise and completely unpicks our work. It's provoking lots of anxiety for Lucy's team and everyone seems to retrench into defensive positions. As one team member said: "If that's how they're going to play it, the only thing I'm interested in is covering my back, keeping my head down, and working strictly according to my job description". I've long espoused a systems approach, and yet, when I'm confronted with the reality of systems dynamics I am taken aback and at a loss as to how to respond.

Occasions such as the above made it hard for me to maintain credibility in my role. Either I had known about the pending decision, in which case I had been less than open with Lucy's team, which made my advocacy for transparency unprincipled. Or, as I explained carefully, I was *not* in the know, which then lead to questions about my role and about transparency within the OD department (as everyone involved, including myself, assumed – rightly as it emerged – that David had been aware of the pending decision). Those occasions lead to difficult conversations with David about the political dynamics in the organisation, my role and the role of OD in general, and our working relationship.

Facilitating action learning

As part of my inquiry into my role I had joined an action learning set organised by a consulting agency. Together with my CARPP group it became an important place for exploring my role as an OD consultant. In my learning set I was challenged about the way I conducted myself in my role: how I struggled with the transition from being an academic and teacher to being a consultant, my tendency to carry other people's

Principles of the Synectics Agenda meeting

- There is no 'chair, only a facilitator (who may be one of the attendees on a rotational basis).
- An agenda meeting lasts no more than 2 hours
- The meeting starts at the agreed time, without exception
- The agenda is developed in the period running up to the meeting. All members can access the agenda (eg. on an intranet site, a flipchart in the office etc.) and add as many items to the agenda as they like.
- At the start of the meeting the agenda is reviewed and attendees can add and delete items as they think appropriate.
- There are no 'standing items'.
- Every item is 'owned'. The person bringing the item to the meeting is automatically responsible for taking it forward.
- People take turns to bring one of their items to the meeting. Every person gets to cover only one item at a time.
- No item gets more than 15 minutes air time. Should the owner need more time, she needs to negotiate extra time with other attendees.
- Minutes are agreed there and then. The item owner decides what is covered in the minutes about his/her item.
- There is no item: 'Minutes of the previous meeting'.

This format encourages people to take responsibility for the items they bring to a meeting. It also ensures that people prioritise their items. Individuals are expected to action their items. Because all attendees are treated as equal, it avoids any one monopolizing the meeting and generating disaffection amongst attendees.

monkey (Schein 1987; Block 1999) and the gap between my 'theory –in-use' and my 'espoused theory' (Argyris 1990; Argyris and Schon 1996). It was an environment of "tough love" (from a diary extract).

Impressed with the potential of action learning I started a number of learning sets in HPA, across departmental boundaries. They offered a safe space for people to reflect with others on difficult issues they were grappling with and helped to break down functional barriers in the organisation. However, they sometimes added to a shared sense of helplessness. Proponents of Appreciative Inquiry's warn OD practitioners that an inquiry capable of inspiring, mobilising and sustaining human systems change is not to be found in a 'problem solving approach' because human beings and organisations move in the direction of what they inquire into (Ludema, Cooperrider et al. 2001); Cooperrider and Srivasta 1987).

I kept diary notes from learning set meetings and compared notes from meetings between different sets to help me see emerging patterns in organisational dynamics.

The feedback I received about the value of action learning and my facilitation was generally positive. However, having had no development other than observing other set facilitators, I thought my facilitation left much to be desired. Gerry, an experienced action learning facilitator became my informal mentor.

The boundary and confidentiality issues were very similar to the ones mentioned regarding coaching and I made every effort to attend to them with care.

Management development
Another aspect of my role is perhaps best described as management development. I ran workshops on strategy, marketing, and various specific skills such as interviewing, giving constructive feedback, structured creative problem solving (Nolan 1987), and running effective meetings. For the latter I used the 'Synectics Agenda' format (Ceserani and Greatwood 1995), because it improved team dynamics and reduced power distance amongst participants.

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I enjoyed that aspect of my role. I was, after all, familiar with 'teaching', knew the material I was working with in depth, and felt confident I could make a contribution.

On occasions a workshop would be the beginning of a sustained engagement, as was often the case with strategy workshops. A number of those projects were successful and truly rewarding.

Reflections

In offering brief descriptions of my work I am at risk of 'disappearing' how I continued to try and live my values and challenge what I and many others experienced as an oppressive culture. In "Radical Change, the Quiet Way" Meyerson (2001) (I return to her work in section 4.5) explores various strategies available to change agents who see things differently from the norm but seek to challenge prevailing wisdom by gentle provocation, rather then direct confrontation. The strategies she describes range from the very private - subtle acts of disruptive self-expression - to the more public -strategic alliance building. Her framework shed a different light on what I had frequently called 'tinkering at the edges' in my reflective diaries. Some of the examples above, I think show some of my 'quiet' change strategies:

- Bringing people together in action learning groups, however amateurishly facilitated, was new in HPA, despite the fact that some of my colleagues participated in or facilitated action learning outside the organisation. The action learning sets I set up began to erode the deep divisions and antagonism between departments and regions, created networks and alliances and some of the participants at least began to reflect on the way in which they contributed to a culture which they were deeply unhappy about.

- Seemingly efficiency driven, Synectics Agenda meetings contributed to deconstructing rigid hierarchies in subtle ways. Some managers refused to adopt the format because of that very reason, others found it of benefit well beyond the limits of the agenda meetings for which it was designed. Team members said they felt empowered.

- Workshops on strategy and management became increasingly surreptitious ways of involving people in strategic conversations and led to increasingly confident

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challenges of imposition from the top.

- My challenge to managers to reflect on their own contribution to the 'problematic team dynamics', was initially frowned upon. But some managers took up the challenge and thrived on it.

There are many other examples. Getting agreement from the CEO to a new structure in her office, designed in a collaborative effort with her staff, which changed the power dynamic dramatically for the better, is one of them. A small, but gratifying form of disruptive self-expression, was my habit to leave the CEO's weekly meeting, seemingly to answer an urgent call of nature, every time she publicly humiliated a member of staff.

In the next section I describe a project in which I more openly challenged disempowering ways of working with positive results.

4.4.3 Facilitating Cross-departmental projects

The most substantial and demanding work consisted of facilitating large projects across the organisation. By their very nature they involved a large number of stakeholders (and many vested interests), stretched over extended periods of time, and sometimes large geographical areas. I kept my reflective diary most dutifully updated about those events and I shared accounts of them with my CARPP group. As well as writing about the actual work, I kept notes of how I attempted to look after myself whilst travelling and staying in accommodations of varying degrees of comfort.

Some examples of such projects were:

- the integration and strategic development of the College, my first OD assignment and one I stayed involved with for over 3 years
- integration of two services/departments at HPA
- the development of a new service, drawing on resources from across a number of departments.

My role in those projects varied from seeking views of staff involved in, or affected by, the project and finding ways to bring those views to senior management,

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facilitating bench marking exercises, facilitating events, supporting individuals (some coaching assignments arose as a result of my project involvement) and teams, creating space for dialogue between groups of staff with conflicting interests, to advising senior management.

My contribution to the integration between two services/departments was the most satisfying for a number of reasons:

- I had fought hard for OD to become involved. I had concerns about the impact the merger would have on staff's working and home lives, and was keen they should have a voice in the decision making. I succeeded eventually, against pressure from senior managers on the integration committee.

- It was a complex project, which many interests at stake. In the course of it I learned much about operating in the 'margins', the power of informal conversations, bringing people together across departmental boundaries and working with union representatives.

- Even at the time, I felt my efforts were getting results (not a regular occurrence) and I received feedback from staff to that extent. I was especially delighted about the feedback from staff in the 'underdog department' (their language). They felt they finally had a voice. When they established, against their better judgement, links with the other department involved in the merger, sharing their concerns and their predicament (the merger involved a move for the former group which played havoc with people's domestic arrangements) they were surprised to find sympathy and support. The two departments united in exercising pressure on senior management and managed to get some decisions reversed and others improved.

In the next section I draw on Meyerson's concept of 'tempered radicals' (Meyerson and Scully 1995) as a final reflection on my work in HPA.

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4.5   Radical with a temper or tempered radical?

Since 1986 Meyerson and Scully (1995) have observed and interviewed hundreds of professionals at various levels of seniority in a variety of organisations and professions, who felt at odds with the prevailing culture of their organisation. The authors set out to understand how those individuals sustained their sense of self amid pressure to conform and how they managed to uphold their values without jeopardizing their careers. They choose the name 'tempered radicals' to describe their protagonist and define the term as follows:

> "Tempered Radicals" are individuals who identify with and are committed to their organizations, and are also committed to a cause, community, or ideology that is fundamentally different from, and possibly at odds with the dominant culture of their organization." (o.c., p. 586).

The individuals they refer to are radical in that they challenge the status quo by their intentional actions and by being who they are, people who don't fit in perfectly. They are tempered in the sense that they seek moderation, and – in the language of physics – because they have become tougher by being alternately heated up and cooled down. They are tempered also in that they 'have a temper' and are angered by the incongruity between their own values and beliefs and the ones they see enacted in the organisation. Temper can mean both "an outburst of rage" and "composure".

The authors see tempered radicals as central figures in introducing change from the margins of an organisation.

The concept of 'tempered radicalism' resonated strongly with my experience of being a change agent at HPA. I will use the authors' seminal article to explore my position at HPA further, paying attention to what I might have done differently in order to have more impact on the organisation and to take better care of myself.

Returning to the definition of a 'tempered radical' I recognise myself in the description of tempered as in 'having a temper' but perhaps less so in 'being moderate'. This was in fact a recurring question from my CARPP group and my

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learning set: to what extent was I at risk of alienating people in power because of my often 'untempered' challenges? As I described in Section 4.4, I did develop some strategies to subtly challenge the prevalent organisational culture, but my relationship with my manager remained largely one of antagonism. Considering his power in the organisation, and his aversion of conflict, I would have done well to take a less confrontational approach.

The authors see the dual nature of the tempered radical's identity as a source of enduring ambivalence. Challenging the notion that ambivalence is a condition to be resolved they see it as having advantages:

- Being "outsiders within" tempered radicals' insider status provides access to opportunities for change, outsider status provides the detachment to recognise that there is a problem to work on. My 'outsider within' status did indeed provide me with both opportunities for change and with the recognition that problems needed addressing. However, I think the issue is more complex. In HPA, as well as in many of my current client organisations, there is often a majority of 'insiders' who also recognize the need for change. The difference lies perhaps in the willingness to act, however surreptitiously, upon that recognition.

- Tempered radicals can act as *critics* of the status quo and untempered radical change. Again I experienced many of my HPA colleagues – and experience many of my clients – as doing both, and the distinction with tempered radicals being in the willingness to act. There are many examples of my challenging the status quo at HPA, but very few of being a critic of radical change, the exception perhaps being the Integration Project, in which I worked hard with staff to find an incremental alternative to the proposed drastic changes.

- Tempered radicals can act as *advocates* for both status quo and radical change. The authors consider the position of a tempered radical as more complex than that of a change agent, who acts strictly as a critic of the status quo. I beg to differ: paying and drawing attention to the best of "what is" (Ludema, Cooperrider et al. 2001) I have come to see as a crucial aspect of my change agent role. Having said that, I cannot honestly recall – or find any examples in my diary – of being an advocate for status quo at HPA. Had I taken a more appreciative approach I may have found opportunities for valuing more of 'what was' and advocated for its amplification.

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I feel very tired, as if trawling through my notes I've had to do the work all over again. I sit for a long time looking out of the window. It is well after midnight. The world has gone as quiet as it goes around here. I treat myself to Handel's Oboe Concertos and a large glass of red wine.

The authors recognise that ambivalence also brings challenges. It was those challenge I tended to focus on in my reflective writing: the difficulty of coping with multiple constituencies: the tension I experienced being seen as an advocate for the higher echelons by staff and vice versa; related to that the fear of being perceived to be hypocritical; the sense of isolation, my continuing concern of being co-opted (often mentioned in my diary); the guilt and self-doubt; "the heat, passion, torment and temper that characterize the experience of being a tempered radical" (o.c., p. 593).

I have already described some of my strategies to achieve small wins. I found connection, support and an opportunity to express my passion and my rage in my action learning group, my CARPP group and with a small number of trusted friends.

With hindsight I think was perhaps more of a radical with a temper than a tempered radical. The description of the latter by Meyerson and Scully seems to me to consistent with Torbert's description of a 'Strategist':

> "*Creative at conflict resolution; recognizes importance of* principle, contract, theory, and *judgement* – not just rules, customs and exceptions – for making and maintaining good decisions; process oriented as well as goal oriented; *aware of paradox and contradiction; relativistic*, aware that what one sees depends on one's worldview; high value on individuality, (…) *aware of dark side*, of profundity of evil and tempted by its power" (Fisher and Torbert 1995 p. 62, my italics).

I was a long way from the poise and balance suggested by Torbert's strategist (o.c) and tempered radicalism, and many of my inquiry practices were in the first instance focussed on finding a good enough place for myself from which to survive. I explore those next.

4.6   My inquiry processes at HPA

At the beginning of this chapter I stated briefly that the inquiry practices I described in the previous chapter continued: psychotherapy, singing, Tai Chi and meditation were all ongoing processes of developing the mindfulness (Bentz and Shapiro 1998) I

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see as the important practices of first person inquiry (Torbert 2001) (see also Chapter 1).

I read mainly material related to organisation development, finding myself frustrated by the extent to which others' descriptions of their interventions seemed to be miles apart from my own experience, or disappointed by what I assumed my lack of thorough enough understanding to apply others' frameworks effectively (McLean, Sims et al. 1982). Writing about their experience of supervising graduate research students, Reason and Marshall (2001 d) describe the tendency of some students to prefer active engagement over exploring theoretically, because the students doubts their ability to work conceptually. I think that was true for me. However, I have also noticed the importance of my social context: there was little interest in theoretical exploration in the HPA OD team. In contrast, I have experienced the interest of my Ashridge colleagues in frameworks and concepts as an ongoing invitation to do the same.

Thus, my inquiry practices in my role at HPA consisted mainly of keeping a reflective diary and seeking critical friends (Torbert, o.c.). I found critical friends in my action learning group, my CARPP group and a few colleagues at HPA. John, my partner, was an ongoing source of support, whilst sometimes challenging me to become more wise to the political nature of organisations.

Much of my diary from that time consists of often furiously (literally as well as figuratively) scribbled notes, interspersed with typed papers for my CARPP group. My writing to CARPP seemed to concentrate mainly on what I hadn't achieved, the anxiety that had caused, my struggle with organisational politics and my concern about not being a good enough inquirer. CARPP colleagues offered feedback and questions about the text, support, and occasionally suggestions for experimenting with different behaviours at work.

The picture that emerges from my hand-written notes is that of woman who reflects in the moment but is carried away on wave after wave of action, struggling to step back and make meaning of it all. It is only in the second half of 1999 that more sustained

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cycles of reflection start to emerge. Nevertheless, it was the hand-written material I found most exciting, interesting and immediate, when I returned to it writing this chapter. It mirrors my mental state and the nature of my work: somewhat chaotic, always moving on, hopping from one assignment to the next.

In 'Storied Lives' Rosenwald and Ochberg (1992) argue that the stories we tell about ourselves are interesting not only for the events they describe, but also for the construction of the stories themselves. How we tell our stories – what we omit and emphasize, our stance as protagonists or victims, all shape what we can claim about our lives. The authors emphasise the importance of the social context in which narratives of self are constructed. In the process of crafting this chapter I have noticed a marked change in the story I tell you, the reader, and myself about my role in HPA: the quality of despair and powerlessness from my diaries and papers produced after I left HPA (including for the transfer from MPhil to PhD) has gradually diminished. I have asked myself whether I have sanitized my story to make it more palatable for my audience. Perhaps I have. However, I think that the change in my context has been a bigger influence in the changing nature of my story:

- I am more confident in my role as a change agent. Belonging to a community of experienced and appreciative colleagues has played an important role in that. I elaborate in the value of belonging to the community in chapter 6.

- I have developed a more balanced view of organisations. I have developed my conceptual understanding – psychodynamic literature (Kets de Vries and associates 1991; Hirschhorn and Barnett 1993; Obholzer and Roberts 1994; Hirschhorn 1999) and authors on relational practice (Miller 1986; Obholzer and Roberts 1994; Meyerson and Scully 1995; Fletcher 1998; Fletcher 1999) have been particularly helpful to understand better dynamics which I had previously experienced as incomprehensible. I also have experience of working across many different organisations now and can look at HPA in the light of that experience.

In chapter 5 I share my inquiry into some of my client work at Ashridge Consulting. But first I close this chapter with a story, followed by a brief 'Interludium'.

Alice plays croquet. (Source : Stoffel 1998)

A fairy tale for closure.

When I left HPA my manager gave me a leaving present: The Art of Alice In Wonderland (Stoffel 1998). His inscription in the book read: "There's more than a bit of Alice about you". I am still not quite sure how to read that, but the following extract from Alice in Wonderland (Caroll 1971), 'The Queen's croquet-ground', struck me as an apt metaphor for my work at HPA.

> *(…)*
>
> *'That's right!' shouted the Queen. 'Can you play croquet?'*
>
> *The soldiers were silent, and looked at Alice, as the question was evidently meant for her.*
>
> *'Yes!' shouted Alice.*
>
> *'Come on, then!' roared the Queen, and Alice joined the procession, wondering very much what would happen next.*
>
> *(…)*
>
> *'Get to your places!' shouted the Queen in a voice of thunder, and people began running about in all directions, tumbling up against each other: however, they got settled down in a minute or two, and the game began.*
>
> *Alice thought she had never seen such a curious croquet-ground in her life: it was all ridges and furrows: the croquet balls were live hedgehogs, and the mallets live flamingos, and the soldiers had to double themselves up and stand on their hands and feet, to make the arches.*
>
> *The chief difficulty Alice found at first was in managing her flamingo: she succeeded in getting its body tucked away, comfortably enough, under her arm, with its legs hanging down, but generally, just as she had got its neck nicely straightened out, and was going to give the hedgehog a blow with its head, it would twist itself round and look up in her face, with such a puzzled expression that she could not help bursting out laughing; and, when she had got its head down, and was going to begin again, it was very provoking to find that the hedge-hog had unrolled itself, and was in the act of crawling away: besides all this, there was generally a ridge or a furrow in the way wherever she wanted to send the hedgehog to, and, as the doubled-up soldiers were always getting up and walking off to other parts of the ground, Alice soon came to the conclusion that it was a very difficult game indeed.*

Interludium

In February 1999 I was told that my mother was terminally ill.
I took a year's leave from CARPP and spent as much time as I could with my family in Belgium. My mother died in November 1999.

In the meantime I had been invited to apply for a job as a consultant in Ashridge. I was offered a permanent position in December 1999 and started work at Ashridge in April 2000.

In the course of 1999 I kept a reflective diary and continued to explore photography as a method of inquiry. The picture on the adjacent page was taken on the day before my mother's funeral. My sister and I had gone for a walk and found ourselves at the old municipal pool where we had spent many a happy childhood day. The outdoor pool, empty and deserted in the morning sun, seemed an apt metaphor for the emptiness in our lives.

In March 2000 I rejoined CARPP.