Peter B. Vaill: A Life in the Art of Managing and Leading Change

82

David W. Jamieson and Jackie M. Milbrandt

Abstract

Peter B. Vaill is both pioneer and thought leader in the fields of organizational behavior (OB) and organization development (OD). Over the past 60 years, Peter's ideas have influenced and informed numerous strands of thinking in the fields of management, leadership, and change. The common thread among these streams of thought: the relationship between organizational practice, theory, and learning. This chapter offers readers a glimpse into the career and work of Peter Vaill. Through several interviews with Peter, others who worked with him, and close readings of his writing, in this chapter we explore the themes and thinking that shaped Vaill's contributions to the field of change.

Keywords

Organization development • Organizational behavior • Permanent white water • High-performing systems • Theory and practice • Organizational learning • Scholar-practitioner • Management education

Contents

D.W. Jamieson (✉) • J.M. Milbrandt
Organization Development and Change, University of St Thomas, Minneapolis, MN, USA
e-mail: jami1396@stthomas.edu; jackiemilbrandt@stthomas.edu

Beyond all of the other new skills and attitudes that permanent white water requires, people have to be (or become) extremely effective learners. Peter B. Vaill-Learning as a Way of Being.

Introduction

Peter B. Vaill is described by colleagues and friends as an "innovator," "creative thinker," and "brilliant" human being. It's no wonder that he has been hailed the "poet laureate of management" (Kramer 2016). A pioneer in the fields of organization behavior (OB) and organization development (OD), Peter's ideas have influenced and informed numerous strands of thinking in the fields of management, leadership, and change. The common thread among these streams of thought: the relationship between organizational practice, theory, and learning.

Perhaps Vaill is best described as an original scholar-practitioner. His commitment, to what we later describe as "the field of practice," is reflected across his lifetime (over 60 years) writing, teaching, consulting, and thinking about human systems behavior and change. Leading various streams of thinking on organizational change and development (Vaill 1971) and executive and managerial learning (Vaill 1979) high-performing systems (Vaill 1982), process wisdom (Vaill 1984, 2008), and meaning and spirituality in organizations (Vaill 1998a) earned Peter notoriety and respect among scholars and practitioners alike. Throughout his career, three essential questions have become hallmarks of his work:

- How do organizations work?
- How do leaders, managers, and employees get things done?
- How can we (management educators) help them (managers, leaders, organizations, etc.) do what they are trying to do better?

In the following sections, we offer a narrative of Peter's life and career exploring these questions. We weave recent interviews (with Peter and others reflecting on his life and work) amidst Peter's essays and books, in an effort to create a semblance of a whole. And while these offerings are far from comprehensive, they offer the reader a glimpse into the depth of Vaill's experiences (events, relationships, ideas) and thinking (essays, books, and speeches) on his life in the landscape of management, leadership, and change.

Influences and Motivations: A Portrait of the Artist as a Young Man

In Peter Vaill's apartment in South Minneapolis nearby to where he attended high school pictures fill the wall. Photograph's of family; A photograph of Vaill, in younger years, arms raised above his head crossing a finish line; A painting of a young boy with a toy ship at the edge of a lake. Just below the painting, a piano-keyboard filled with pages of gospel music. Flanking a corner in the room, a writing desk with two bookshelves. One filled with a collection of his work (including his dissertation) the other filled with books that have been and remain influential to his thinking. A window next to his writing desk trimmed with a banner from months gone by, a reminder of the past moments of celebration reads "Happy Birthday!"

A Portrait of the Artist as a Young Man

Peter B. Vaill was born in St. Cloud Minnesota, on November 5, 1936, to Stanley and Elizabeth (Brown) Vaill. When Peter's father (who worked for the phone company) was transferred from St. Cloud to Duluth for 9 years, then later to Minneapolis. Peter went on to attend and graduate from high school in Minneapolis, and then went to the University of Minnesota, earning an undergraduate degree in psychology. At age 23, (1958) Peter left for Boston and admitted as a student in the Harvard MBA program.

In early and later essays on the field of OB (Vaill 1979, 2007), Peter reflected on his early days as a student at Harvard. It was at Harvard that he would first experience the field of organizational behavior (OB), where he would develop his early training and "case method" perspective and where he would meet with the people and ideas that would shape the trajectory of his career in the fields of management and change.

There may be dozens of experiences that informed Peter Vaill's thinking while at Harvard, but two events stuck out in his recent reflections (Jamieson and Milbrandt, May 2016a, June 2016b). The first was a class that he took during his MBA studies at Harvard, 1958–1959. The class was called "Human Relations" taught by a contemporary and close colleague of Fritz Roethlisberger – George Lombard. (George Lombard was described by Roethlisberger as one of his closest friends and later became editor of Roethlisberger's autobiography, "The Elusive Phenomena" (1977).) According to Vaill, Lombard's class was heavily influenced by the works of Roethlisberger and Dickson (1939) and Carl Rogers (1961) and built around practical application. It taught skills on listening and interpersonal relationships. As Peter described,

> . . .it [the course] was heavily oriented towards listening with acceptance, and empathy–Carl Rogers' hallmark. It was framed in a way to teach how to listen to the people around you, especially those who are reporting to you. . . . how to understand what their needs are. . . . how to understand what they are saying, what their feelings are. . . (Jamieson and Milbrandt, May 2016a)

The second major event was Vaill's decision to enter Harvard's newly named organizational behavior doctoral program. It was during Vaill's doctoral days that he became intimate with the perspectives of Roethlisberger and the case method.

In the 1960s Fritz Roethlisberger was the chair at Harvard and busy forming an exceptional OB department, attracting many of the future thinkers in the field. Roethlisberger had operated in the same era as Kurt Lewin, and both were researching various aspects of *human behavior in field settings* and exploring questions involving what we think of today as *engagement*, *motivation*, *turnover*, *productivity*, and *managing change.* Roethlisberger with mentor Elton Mayo was part of the classic Western Electric Company (Hawthorne Plant) studies in the 1920s–1930s where the field grew in its understanding about climate, motivations, and the *social systems of the workplace.*

Although Vaill was at Harvard for only 6 years, 1958–1964, his time there would prove formative. During his first year as a doctoral student (1960–1961), Vaill was introduced to a model of the field of OB conceived of by Fritz Roethlisberger. The model attempted to "map" the emerging field of organizational behavior. It was composed of six boxes that Vaill commented would likely be too simplistic for contemporary scholars, but at the time Roethlisberger presented it to the faculty and doctorate students at Harvard, it made a lasting impression. Nearly 45 years later, Vaill would write:

> In retrospect, this memo is perhaps of even more significance to a doctoral student and a relatively young working scholar than to a seasoned professional, for it urges us to think about how we are framing the field to ourselves, our students, our colleagues, and our professional reference groups. As we shall see, Roethlisberger wants to keep the practitioner in the picture. But the import of his memo is how keeping the practitioner in the picture then affects the theory and research that we do, and vice versa. (Vaill 2007, p. 323) (Fig. 1)
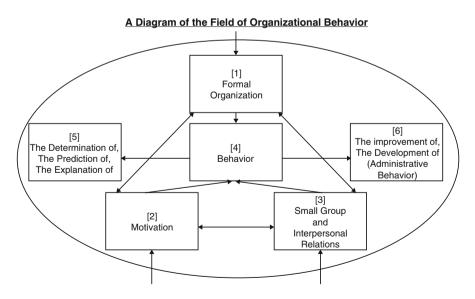

Fig. 1 A diagram of the field of organizational behavior

To enumerate on this "import" of the diagram and "keeping the practitioner in the picture," Peter concluded:

> As Roethlisberger well knew, the relations of theory and practice are themselves matters of a great deal of theorizing. The problem abides, partly because every new theory of theory and practice creates its own new problems of practice: How is this theory to be used in understanding it and working with it (i.e., practicing) to influence the world. . . . How does any new theory, any new idea about the relations of theory and practice, help? How does practice then influence the evolution of this new theory? . . . . As I noted, Roethlisberger himself could spin much more complex models of the field than this simple diagram. Yet he does offer it as a "diagram of the field" as a basis for asking what he considered questions of the most profound importance. (Vaill 2007, p. 323)

Vaill's reflection on his mentor, and early impressions of the field, allows us to see and understand the development of his unique "framework" of the managerial leader. It also informs how we may begin to differentiate the ideas which he would spend a lifetime exploring – which he would later describe as "Managing as a Performing Art," and the "Practice, with a capital P."

Impressions of the Organization and How It Functions

Vaill's early impressions of the field were situated in a time when "you could do no wrong" in the organization. The 1950s and 1960s were a golden era in which leaders and managers had the luxury of "good profit margins and stability." As a result, there were new innovations, ideas, and experimentation emerging under the banners of organizational behavior (OB) and organization development (OD): Peter was at the epicenter of both. He learned from the original thinkers, participated in early research and practice that led to many further developments in the fields, and began teaching the next generations of managers and other practitioners.

Paul Lawrence was Vaill's dissertation chair. Lawrence's early work was captured in *administering change* (Ronken and Lawrence 1952) and later he contributed to the quality of work life (QWL) movement. The major headline from *administering change* that stuck with Vaill was the idea that change goes better when people have a shared understanding. Peter later commented:

> He [Lawrence] had five propositions about the forces that facilitated change and inhibited it. . . . but the shorthand was that when people were all on the same page, change went more smoothly. When people were not, things were rocky and communication either didn't occur or it mis-occurred (sic). . .but the most interesting thing was how the jobs they were doing influenced their perspectives on what the "page" even was. Compatible perspectives produced good communication, conflicting perspectives produced less effective communication. Understanding this "pin-pointed the "change problem." (Jamieson and Milbrandt, May 2016a)

These early learnings about the need for people to "get on the same page" (for change to work) were confounded by individual perspectives. The realization that

your perspective of what the "page" was changed depending on your job would inform Peter fundamentally throughout his career. The early influences of Roethlisberger and others (Argyris, Likert, Lewin, Maslow, Rogers, and Lawrence) are traceably woven into Vaill's thinking and subsequent writing.

As Vaill worked toward his dissertation, he continued to refine his perspective. Ultimately, Vaill would reject the "scientific" ideals dominating the field of management – the notion of an absolute truth (based on what can be objectively measured). Instead he would embrace the idea that there are multiple truths (based on subjective experience and meaning). From then on Vaill's guiding question would be, "From whose point of view is this true?"

As Vaill pursued his dissertation work, thoughts around the dilemma of "multiple points of view" and the experience in organizations became more concrete. Namely, he was perplexed by the idea presented by Argyris (1957) that the needs of the healthy individual and the needs of the bureaucratic organization were incompatible. To Vaill these ideas revealed a need and passion to better understand (1) how "the hierarchies" within the organization worked and (2) how managers made meaning from their experiences and this meaning influenced their thinking and action (practice). It would be a mixture of good fortune and serendipity that he would be encouraged to work on a large-scale research project that provided him the opportunity to better understand the nature of these competing needs.

Paul Lawrence, who was teaching at Harvard was involved in a big research project at the time collecting data in 11 large organizations. What Vaill did was go into the companies, first with Lawrence and later on his own, to survey the different jobs and departments, using a questionnaire that had been developed to score different dimensions of the jobs, such as creativity, the amount of interaction they had with others, etc. As Vaill described it:

> Paul (Lawrence) was doing a large scale study on the relationship between the structure of industrial jobs, blue collar jobs, and the feelings and behaviors that people had in those jobs. . . . there was a lot of talk at the time on quality of work life and job design and that sort of thing. (Jamieson and Milbrandt, May 2016a)

As Vaill researched the various companies, he was looking at not only the organization and how it was structured but also observing how the people functioned in their environment and with each other. He commented on the process stating:

> We went around to several companies Paul had access to [a paper mill, a chemical plant, an IBM plant]. . . . and we would go in and talk to the personnel people and they would take us down to the factory floor and we would walk around and look at different jobs and departments until we finally isolated a collection of jobs – a set we thought could be studied. (Jamieson and Milbrandt, May 2016a)

Peter wrote short cases on each of the organizations and for his dissertation wrote an in-depth analysis of one of the companies (the Fuller Brush Company and Brown Paper Company). These cases were never published; instead, they ended up being absorbed into the "Harvard system" and used for classroom teaching. Through his

experience, researching in ways that combined theory with practice, Peter developed a point of view that would become instrumental to his life and work – that of a scholar-practitioner.

The Makings of a Scholar-Practitioner

A year after completing his dissertation, Peter was hired by Robert (Bob) Tannenbaum to teach at UCLA and who, according to Peter, thought he was getting a "systems and technology" expert. Vaill reflected:

> To an extent he (Bob Tannenbaum) did get that, because I was interested in the systems and technology, and I also had the desire and readiness to understand OD, and all that was being talked about it. . . . The Harvard point of view, the Case Method point of view, gives you a strong feeling of wanting to immerse yourself in some particular situation and that's what the OD consultant had to do is immerse in particular situations. (Jamieson and Milbrandt, June 2016b)

Working closely with Tannenbaum was a wonderfully rich experience and an opportunity to go deeper on the humans-in-organizations side of his interests. Bob was a proponent of "use of self" and the deep personal work needed to be healthy and capable of being your best. Without the humanistic values of *authenticity* and *intentionality*, organizations were designed to operate in ways that caused people to play games and behave in very unhealthy and inauthentic ways (Massarik et al. 1985).

Vaill's first year, 1964, as a professor at UCLA, under the leadership of Tannenbaum, placed him squarely in the mix of a very large-scale OD project at TRW Systems:

> Bob got me involved right away. Shel Davis, who was the main OD guy, had recruited a line-up of experts that included, (Richard) Dick Beckhard, Herb Shepard, Bob Tannenbaum, and there were a couple of other big names. Anyway it was a tremendous line-up. . . . and the consultant and department manager together were co-training. And after training all of the department managers in T-group facilitation, the OD consultant and the department manager would run T-groups for everybody. . . . and the whole idea was to get the people talking to each other. . . (Jamieson and Milbrandt, May 2016a)

As it would turn out, the experience of applying, innovating, and creating ways to help the leadership at TRW Systems develop their organization would prove to be another stroke of good fortune and serendipity for Vaill. According to Vaill, Sheldon Davis was a "scholar-practitioner." He was a leader who was ready to try new things and could integrate them. Davis had tremendous energy for this, and when asked how he kept it up quipped "Love the people, hate the system!" (Milbrandt 2017). In retrospect, this rare combination of qualities Davis embodied would be something Vaill would reflect on throughout his career. In these interactions at TRW with the externals (including Beckhard and others in the lineup) and the internals (Shel Davis and other managers) that Peter would see the "crystallization" of major innovations and concepts in the field of OD come into use.

Another notable influence during Vaill's time at UCLA was his interactions with Eric Trist. Trist had been instrumental in publishing a body of work in England involving the creation of the socio-technical systems theories and practices for improving workplaces and their effectiveness (Emery and Trist 1965). Trist's perspective on socio-technical theory – which involved the simultaneous optimizing of the technical and social aspects of organizations – had a huge impact on the emerging fields. Bringing to attention a need for research on outcomes of work and quality of work life, the socio-technical theories would later influence streams of thought on organizational engagement and satisfaction. While Vaill was at UCLA, Trist was a visiting professor in the Socio-Tech and Work Design Center led by Lou Davis. According to Vaill, he and Trist would become close colleagues. These interactions, no doubt, added greater depth to Peter's thinking on the systems view of organizations.

Throughout these experiences, informed by pioneers in the fields of organization behavior (Roethlisberger, Lombard, Lawrence, respectively) and organization development (Beckhard, Shepard, Tannenbaum, Trist), Vaill crystalized a line of thinking that would be unwavering – Peter would begin and end his career with an eye toward understanding leaders and the organizations from a perspective of experience, meaning, and practice.

On the Frontiers: Early Years in the Fields of Management and Change

It was 1966, Peter, in his later years at UCLA, found himself at an "Industrial Network" meeting at a Holiday Inn, in Montreal (Vaill 2005). Tannenbaum, who couldn't attend, asked Peter to go in place of him and represent the university. As Peter recounts it, there were two important things that took place at that meeting: (1) The network changed its name from the "Industrial Network" to the "Organization Development Network" (ODN) and (2) the leadership transferred from Jerry Harvey to Warner Burke. (The late Jerry Harvey, also a professor of management and later at George Washington with Peter, would become a lifelong friend and colleague.) Peter would go on to attend nearly every ODN meeting from the 1970s through the 1990s. Peter was also present when the leadership changed again from Warner Burke to Tony Petrella in the early 1970s. Peter recalled how during the Burke and Petrella years the organization grew from its founding, with about ten organizations represented in the Industrial Network, to more than 3000 members in the ODN when Petrella took over.

Peter also had many opportunities to work with NTL. Founded in the late 1940s by Kurt Lewin, with the help of Ron Lippitt, Leland (Lee) Bradford, and Ken Benne, NTL was a diverse mix of academics and practitioners from various backgrounds ranging from disciplines in the social sciences (psychology, social work, organizational behavior, sociology, political theory) to education (adult and organizational development). In its zenith, NTL was the place where scholars and practitioners who were interested in understanding "group dynamics" and social systems came to learn

(Kleiner 2008). It was in this context that the innovation of the "training group" otherwise known as the T-group flourished. Throughout the 1950s and 1960s, the T-group experience would be the dominate method used in Bethel labs. In many ways, these labs and the T-group infused the field of OD with its original energy (Bradford et al. 1964).

According to Vaill, his introduction to NTL was in the early 1970s. Peter was invited to study a subject that had received very little attention: "The world of the OD practitioner." The research involved several weeks at NTL's 1970 summer head-quarters in Bethel, Maine, conducting in-depth interviews with consultants going through NTL's "Program for Organizational Training and Development." That summer, Beckhard was head of the program Peter was investigating.

A year later, Vaill completed his first on the topic of OD publication entitled, "Practice Theories in Organization Development" (Vaill 1971). According to Vaill, this study brought some attention to the field of OD and attempted to begin to define it from the bottom up. In understanding how OD professionals and managers made sense of their practice, Peter felt he was bringing some focus and clarity to defining OD. Themes found in Vaill's later writings are echoed in his conceptualization of "practice theory." Vaill writes:

> In the development to date of the OD field, two other subjects have received a great deal more attention then has the OD practitioner's own frame of reference. The first area is the study of organizations, and particularly what is wrong with them.... The second major area is how the OD practitioner, the agent of change SHOULD act if he wants to influence the system – an evolving body of prescriptions for effectively influencing organization events.... The basic thesis of this paper, however is that these two areas of OD should not continue to develop without being tempered and tested against the practical realities of the OD practitioners situation, that is against how the organization seemed to be TO HIM.... .practice theory is, literally, a personal theory guiding practice, bearing some relation to public, objective theories, about organizational situations, but in no sense identical with them. (Vaill 1971, p. 162)

Another key event during this period was that Vaill, shortly after receiving tenure at UCLA, and despite his deep admiration and love for Bob Tannenbaum, accepted a position at the University of Connecticut. This would prove to be a pit stop – as only a few years later, in 1973, an invitation would come from Gordon Lippitt (who Vaill had met at NTL) to interview for the deanship at George Washington University (GW) School of Government and Business Administration. At GW, Vaill would find a cohort of kindred spirts who would come to support him as a leader, colleague, and changemaker. Peter's entry into GW put him on the fast track to becoming a spokesperson for OB, OD, and management education.

In the Trenches: Middle Years Managing the Art of Change

Accepting a dean's position, in the School of Business and Public Administration, at George Washington (GW) moved Peter into a new phase of his career: administration. Although Peter only spent 5 years as dean, he spent another 20 years as a

professor and director of what was initially called the "experimental doctoral program." According to his close colleague Erik Winslow, who was part of the team that received him at GW, Peter was part of a dream team that Gordon Lippitt had assembled which held enormous influence over the school at the time Vaill was there. The "team" was comprised of Peter Vaill, who studied with Roethlisberger and Tannenbaum, Erik Winslow who studied with Fredrick Herzberg (1976), and Jerry Harvey (1988) who studied with Robert Blake (Blake and Mouton 1964). It was a confluence of those influences (Tannenbaum, Herzberg, and Blake) along with Maslow (1943) and McGregor (1960) that really created the powerful team that shaped GW business school – which was one of the largest in the country (Dent 2002).

When Vaill accepted the deanship, he was only 37 years old.

In his first year as Dean, 1974, Peter delivered a commencement speech to the graduating class – entitled "Management as a Performing Art." Nearly 15 years later, Peter would publish his first book, with a similar title. Winslow reflected on the early development of Vaill's thinking:

> The three of us were talking- Jerry Harvey, myself and Peter once about managing and the roles managers have to play and he laughed and said, "Well, that's because managing is a performing art." And he wrote a speech about that. And Jerry Harvey kidded him and said, "How are you going to make a speech about managing as a performing art if you aren't going to do a performance?" And I couldn't believe it- Peter took a recorder- he took it with him to where he was giving the speech and before he started his speech he played a song on the recorder! And then he said, "That's to introduce my topic, "Management as a Performing Art." And I thought that was so creative. And quite frankly such a risk-taking behavior. . .. but was brilliant, just like Peter. (Milbrandt September 2016a)

Embedded in this early speech were the seeds for Vaill's central argument, then and now – business schools and business educators needed to change the way they were preparing the leaders of the future to lead future organizations. Vaill began to communicate, with urgency, this perspective pointing out quite early that the golden era in which the field of management was born would not return. Therefore, the concepts, theories, innovations, and checklists for how to manage it were ineffective. These models did not address the realities that managers were experiencing in "the trenches." These theories did not help leaders in their practice of leading organizations. Peter's advice to the teachers of management and change: *turn to practice to reinvigorate scholarship.*

Through Peter's various professional organizations (NTL, ODN, OBTS, ASTD), he would exercise and demonstrate his commitment to this end. Peter worked tirelessly to challenge and expand the boundaries of his own and others understanding of their practice. Longtime friend and colleague, Marvin Weisbord, recalled his work with Peter at NTL, first in workshops and later in sessions with the PSOD program. As Weisbord reflected, Vaill is, and was, an astounding designer of process, insightful on the social aspects of learning, and a creative idea stimulator. Having worked with Peter across decades, Weisbord offered key illustrations of Vaill in these areas. In describing a learning process Vaill designed (called ESAC –

an acronym for Educational System for Accelerated Comprehension), Weisbord laughed with joy:

> Oh, I haven't thought about this in years. Here is how it works: You are trying to teach something to a group. And you give them a presentation and instead of lecturing them for an hour or half an hour, you give them some of the basic concepts and a little task. Then you put them in small groups and you say, "What's your understanding of this and how to apply it?". (Jamieson and Milbrandt, June 2016c)

Later, Weisbord commented on the instrumental role that Peter played in leading and transforming the NTL, as an organization. He reflected:

> Peter was part of what we called the gang of four who re-organized NTL in 1975-which at that time was coming apart. . . . The social model- the whole idea that there was this elite group- called the fellows of NTL the 40 or 50 mostly academic members and then there were the grunts, like me, who were practitioners, and there were other issues around race and gender and other stuff – and so it really was a cultural re-organization. . . . and Peter was one of the four members who were asked to figure out how to organize NTL – it was Barbara Bunker, and Edie Seashore and Hal Kellner, and in 1975 they held a forum – So they got 60 of us together, and I don't know how they picked us, but we went to Washington and we spent two or three days thinking and re-organizing the future of NTL. Peter was really instrumental in the process. (Jamieson and Milbrandt, June, 2016c)

According to Weisbord, Vaill's's ability to stimulate ideas and new insights was an experience he had of Vaill time and time again. Vaill's creativity, his drive to experiment with design, was instrumental in Weisbord's development of his own process, *Future Search*.

As Weisbord explained it, the 1986 lab would be the last he and Peter ran together at Bethel. It was a 2-week lab designed for experts in the field of change. Weisbord commented he was anxious to experiment with the Future Search process, which was part of the design. The first week, they (Vaill and Weisbord) ran the lab according to the original plan, and it was the "worst lab ever." The second week (after making some adjustments) was the "best ever." As Weisbord described it, Vaill's ability to *experiment with experience in ways that he and others could use what they were learning* was a hallmark of working with him. Weisbord later reflected:

> In fact, Peter is the one who added "helpful mechanisms" to the six-box model (as found in "Productive Workplaces," 1986) as a catch-all to the things that I found didn't fit in the other boxes. He and I were talking one day, and I couldn't figure out what to do with these things that didn't fit. And I said, These things are helpful mechanisms. . . and he said "Then why don't you call it that?" And later he liked to say "that (helpful mechanisms) is the most useful box of all." That captures him in a nutshell. . .In the end it's what you do to help integrate. . . . (Jamieson and Milbrandt, June 2016c)

Weisbord concluded, Vaill's focus on what was useful stuck with him as he later helped developed his ideas on "acts of leadership" (being a good innovator, helping people collaborate across boundaries, etc.). Vaill's creativity with and concern for how things "worked" was one of his greatest gifts.

Key Contributions: A Life of Leading and Learning

Peter B. Vaill's life has been filled with writing and thinking but also leading in learning. As an educator for nearly 45 years, Vaill's interactions with others ranged from teaching in formal academic settings to presenting among peers. It is difficult to ascertain the impact of these interactions to those whose life Vaill touched. In speaking with a former student, Eric Dent, who is now an Endowed Chair in Ethics at Florida Gulf Coast University, we found a story that echoed Peter's own experiences as student at Harvard:

> I started an MBA program at George Washington University in 1984. I was planning to major in finance. So as you know every MBA student has to take the core courses and so I was taking a required organizational behavior class and he (Vaill) was my professor. . . . And while I was taking that class there were some things that were happening at work (related to what I was learning in the class) and that changed my interest from computer science and the physical sciences to human behavior. After that class the trajectory of my life changed from a career field in one area to a life-long interest in human behavior. (Milbrandt, July 2016b)

And later when describing Vaill's approach in the classroom, Dent reflected:

> You are going to get a pretty one sided story from me, I am a huge Peter Vaill fan. I think he is one of the wisest people I have ever met. I was always very impressed that he didn't teach from notes, which was different from the other faculty I had met at that time. He just seemed to know the material inside and out. He was able to place things in historical contexts and come up with incredible examples that seemed to illustrate in real ways the concepts that he was teaching. (Milbrandt, July 2016b)

In a different interview with William (Bill) Monson, who worked with Vaill in the executive MBA program at the University of St. Thomas (UST), Monson commented:

> I met Peter through a paper he wrote, the paper was titled "Notes on Running an Organization" and I made an immediate connection with him having never met him because he had such clarity on the topic. (Jamieson and Milbrandt, June 2016b)

Further reflecting on Peter's approach with students, Bill added:

> . . . . he was always careful not to privilege the art of management, or the science of management, but let's talk about the practice of management. What its really like for the person in the position called manager. And one of his core contributions, was his way is to go about this which was a reflexive process. (Jamieson and Milbrandt, June 2016b)

In Peter Vaill's own writing, he would eventually address the topic of teaching, identifying this role as both primary and important to his identity. In a reflective essay on his teaching, Vaill (1997) wrote:

> . . . .I have functioned as a teacher/speaker/presenter/workshop facilitator on the average of at least 2 or 3 times a month for my entire career. . . .to capture the diversity of my experience in this chapter, I do not use the words teacher and student and classroom to talk about my work. I refer to myself as a presenter, to those I am presenting to as participants and to the setting in

which I am doing it as sessions. These words for me do better justice to the range of my experience and to the fact that so many important learnings have occurred outside my role as a teacher of students in a classroom. (pp. 261–262)

In scope of Vaill's career, whether as the presenter or participant, this much seems true: Vaill's sense that good leading is learning and good learning is being aware of the opportunities and conditions needed to maximize learning for yourself and others.

Efficacy at the Point of Action

Perhaps it is in Vaill's earliest work and writings that we can see the greatest fire between his words, and we can see the solidification of his argument that leaders and organizations need to pay more attention to the experience, to the act of managing, to developing a consciousness and awareness which informs *how* things *happen* or *don't*.

In an article Vaill published on the field of OB, entitled "Cookbooks, Auctions, and Claptrap Cocoons" (short title, 1979), Vaill writes:

I simply cannot imagine an academic field which lacks any of the components of OB: Its interest in action and its connection to the work of affairs; its eclectic intellect and relative freedom from preoccupation with the fine difference between psychology, sociology, philosophy, history, political science and economics. . . If we were more interested in action we would attach more importance to the experience. . . . We would be awed and humbled by the obvious fact that most of the time, most people make plans and are actually able to carry them out. We would ask, "How is that?" "How is that?" (Vaill 1979, p. 3)

This question and the preceding statements imply a train of thinking which would lay the foundation of Vaill's later work. The observation that leaders will need to let go of the formulas, the cooked up theories, and the "generalized" checklist of "what to do" in order to answer the better question, "how to do it?" To illustrate his concern for the "checklist trends" and often "impracticality" of theories that were constructed apart from practice, he offered the analogy:

We've all heard managers and students ask for a cookbook (and among ourselves we speak condescendingly and even disdainfully of such needs). But what would the cookbook look like as written by a contemporary, OB professor? Well, it would probably take a systems view and discuss at great length the interactions of the cook, ingredients, utensils, sink, stove and diner. Reading it, one would not be able to tell if it was addressed to the spoon, the salt shaker, the cook or the dough. . . . As the field of cookbook theory matured, sub-specialists would emerge. We would produce a doctoral field in salt-shakers. Two-factor theories of the cook's motivation would be offered. . . .ultimately the heavy-hitters in cookbook theory would be sitting in endowed chairs, satraps in a game which, long since, had relegated the cooks to the sidelines. (Vaill 1979, p. 4)

Vaill's laser-like focus on practice and study of how managers and organizations "got things done" would be consummate throughout his career and eventually prompt Peter to look at the role of leading and learning, in increasingly complex environments: in other words, twenty-first century organizations.

Midway into his career, Vaill set into motion his thoughts on this in what he described as "high-performing systems" (Vaill 1982). As Vaill conceived it, "high-performing systems" were ones in which the leaders "share three commitments – time, feeling, and focus – that enable them to project and maintain a clear and effective sense of purpose among all system members."

- *Time* refers to the observable and consistent long hours leaders devote – Vaill clarified in his later reflections on this that these leaders are not necessarily "workaholics" but typically stay longer hours than their counterparts who are not members of a high-performing system.
- *Feeling* refers to the clarity, respect, and devotion for which they express to the system and the people that work in it.
- *Focus* refers to an uncanny thoroughness of understanding of the work. Knowing what two or three things that need to get done and moving into action on them.

In these early comments, Vaill's sense of urgency and call for change is both unwavering and unapologetic: "Managing as a Performing Art" (1989) was a concept whose time had come.

Shifting the Paradigm

By the mid-1980s, Peter Vaill's sense that the management theory being taught in schools was outdated and the literature being used to teach MBAs was ineffective in preparing them for the "real world" was growing. It was at this time that he and a colleague were facilitating a session at the ODN conference called "My Practice." The session was meant to explore the current experiences of managers, leaders, facilitators, and other participants who attended.

As Peter reflected on this session and his growing observations of the increasing levels of change, uncertainty, and turbulence that management and leaders were facing, he offered that "leaders and managers are in a position of stepping into the dark with most of the initiatives they propose. They don't know what's going to happen next." In response to this suggestion, a participant who remains unknown offered his experience stating:

> Most managers are taught to think of themselves as paddling their canoes on calm, still lakes...they're led to believe that they should pretty much be able to go where they want, when they want, using means that are under their control. Sure there will be temporary disruptions during changes of various sorts – periods when you will have to shoot the rapids....but the disruptions will be temporary, and when things settle down you will be back on calm lake mode. But it has been my experience, he concluded, that you never get out of the rapids. (Vaill 1989, p.)

Of course, hindsight is the best foresight. If today's readers pick up *Managing as a Performing Art* (1989), they may find themselves sucking air through their teeth as they shake their head in awe at the relevance "permanent white water" holds today.

Vaill's insights in Managing as a Performing Art are unchanged by time, and are as relevant now as when written. The metaphor and its meaning to organizations illustrate the feeling today's managers often talk of as "putting out fires," "going backward," and the feeling of being incapacitated in their ability to "get a handle on it." In permanent white water, leaders are sailing at breakneck speed into the unknown, propelled forward by forces they have no control over: the continuous, roaring white water beneath them. Peter's essential point is that it is incumbent upon leaders to stop putting their attention on how things got done on placid waters and turn their attention to how things are getting done in "white water."

In another well-known essay that followed, *Notes on Running an Organization* (Vaill 1992), Peter expanded upon his thinking on the need to learn from and observe the experience of practice commenting:

> Theory and practice do not "integrate"; they dance with each other, sometimes lustily, but just as often ploddingly or with one lording over the other or warily and with stony indifference. But it also must be said that in a school of administration, management, leadership, or practice, if theory and practice do not dance with each other somehow, the learner will graduate not knowing much about practice nor having gained any increment in concrete skill nor remembering any of the theories that were intended to be relevant in the future. (Vaill 1992)

Ultimately, in his writings, Vaill planted the seeds for a new paradigm: *Learning as a way of Being*. As Vaill points out, the model of the organization in which leaders can assume to know what to expect is becoming obsolete, that the emphasis on technical and rational solutions, or "off-the-shelf" remedies were no longer useful – if they ever were! Replaced with an increasing need to manage unknown thinking and action, organizations and the people in them need to learn how to manage the challenges of permanent white water, where the reality is chaos and uncertainty.

Vaill grounded this new paradigm in the following key assumptions:

- Reality is socially constructed.
- That the nature of "being" is subjective (there are many truths, perspectives, and meanings).
- The most effective leaders (in "permanent white water") will seek to understand and learn from their experiences and from the perspectives of those who report to them.

These key assumptions offer a compelling new vison of organization in the "new age" in his hallmark thinking on the art of managing permanent white water that came to maturity in his second book, *Learning as a Way of Being* (1996).

Toward a Human Image of the Organization

The value of *Learning as a Way of Being* (1996) lies not so much in the ready-made skills or steps offered to the reader but rather a perception of consciousness and the

processes needed to develop it in future organizations. Vaill challenges his readers to consider these frames (old and new) of the needs of the individual and the organization stating:

> The permanent white water in today's systems is creating a situation in which institutional learning patterns are simply inadequate to the challenge. Subject matter is changing too fast. Learners are interweaving their learning with work responsibilities and expecting their learning to be directly relevant to these responsibilities...The problem is to envision what learning can be and how it can go on giving... while the traditional paradigm for conduction is not designed for the task and is in many ways inadequate under the current conditions. (Vaill 1996, p. 41)

Vaill goes on to define an approach and development of whole-person learning – or learning "that goes on all the time and extends to all aspects of a person's life...." (Vaill 1996, p. 43) in seven types:

1. Self-directed learning
2. Creative learning
3. Expressive learning
4. Feeling learning
5. Online learning
6. Continual learning
7. Reflexive learning

In Vaill's typology, learning becomes the antidote to "white water." And Vaill is quick to point out that learning in organizations is necessary at all levels. To do this, Vaill suggests we must (collectively) shift our attention from understanding what has been (past performance metrics, ROI, profits, and loss) to what is becoming (new insights, synergies, invention) from the static (the tried and true, past successes, old pathways) to the dynamic (interactions, experiences, collaborations, innovation) from what is fixed (what we do) to what flows (how we are doing it). In this new frame of the organization, we can do better than surviving permanent white water – we can master the experience of it.

After writing *Learning as a Way of Being: Strategies for Survival in a World of Permanent White Water* (1996), Peter left GW for an appointment as an endowed chair in the newly forming Opus College of Business, at the University of St. Thomas (1997–2003), and helped develop a cutting-edge executive MBA program. Within that period at St. Thomas, Vaill would publish his third book, *Spirited Leading and Learning: Process Wisdom for a New Age* (1998), and various other commentaries on the field of OB and OD.

Process Wisdom: The Heart of Organizations

Vaill's early and later work on *process wisdom* is spread throughout his writings and teachings. He was regularly commenting on what managers did well (process), what

didn't work well (process), and the need for new ways of acting (process) in the growing landscape of permanent white water. In one of Vaill's more recent chapters on "Process Wisdom" in Thomas Cumming's, *Handbook of Organization Development* (2008), he pulls together his earlier and current thinking on the role of process in social systems and organizations. In this chapter, Vaill emphasizes how process affects learning and subsequently all we do – and poses the question, if content is constantly changing, in what ways might our processes need to change too?

Vaill highlights eight virtues *process wisdom* brings to an organization in change. He Vaill argues that process wisdom:

1. Surfaces the *what* and the *how* in the organization, what the organization is trying to do, and the goal development and formal goal-directedness
2. Calls out the social (relationship) changes needed or implied by any change
3. Identifies the unintended consequences of leadership initiatives
4. Anticipates events that will need to happen as part of understanding how people may be affected by the changes
5. Helps to see beyond the immediate context of an action, into the larger system
6. Anticipates downstream disruptions to social process
7. Teaches others how to see and use process wisdom and provides a common language to more deeply explain what people are experiencing
8. Understands the element of the "unknown" when facing a "process frontier" and creates ways to authentically help people maintain experimentation and learning

In Vaill's *Spirited Leading and Learning* (1998), he continued to expand the challenge of the managerial leader being twofold – to recognize the importance of purpose and meaning in what people are doing (as they see it) and how to help one's self and others to determine what's missing and what needs to be worked on.

Themes in *Learning as a Way of Being* (1996) and *Spirited Leading and Learning* (1998), as well as in later essays (Vaill 2005, 2007, 2008), build to this general and final conclusion: Organizational life demands learning that is more personal, person-centered, and relevant to the needs of the individual, in order to serve the human system which Vaill contends is "the only side of the organization!" In this spirit Vaill rejects the dominant image of the organization, what he refers to as the "material-instrumental" perspective, offering an alternate vision of organizations, with a five-way bottom line (Vaill 1989). Vaill writes:

> I have concluded that it is possible, to talk about five ongoing and intertwined streams of valuing – a "five-way bottom line"... My alternative to the M-I model is a view of the organization, as an intertwined stream of energy that keeps it going from the individual and joint actions of people as they work out their sense of what is important, of what they need to do in their own present reality to fulfill and continue to pursue their sense of who they are. The five categories are simple and easily recognizable. I call them the economic, the technical, the communal, the adaptive, and the transcendent. (Vaill 2009 Conference Paper)

This highly "conscious" awareness on development was integral to Vaill's concepts of "Spirited Leading and Learning" (1998). As Vaill surmised, a leader's ability to

understand meaning and purpose in their own life is the measure of their ability to develop such consciousness in others. And without this understanding of self – this whole-person consciousness – Vaill contends organizations cannot and will not survive the "rapids" of permanent white water. Ultimately, Peter invites us to become explorers, to abandon the idea of being learned to become *learning beings*, and to abandon the image and meaning of the organization as an economic engine and replace it with a construct that is more resilient, robust, whole, and humane. Peter points to key elements of this transformation:

- The practice of becoming *learners* versus *learned*.
- The practice of balancing what is technical (techniques, skills, competencies) with what is social (the social nature of human beings, our values, our assumptions, our desires and needs).
- The practice of valuing the process as much as the product. While work life has a utility, product, or service, leaders must attend to the process (purpose, meaning, and ways of working that honor the people who are and make up the organization).
- The practice of framing organizational scholarship and (i.e., management, OB, OD, ODC, HR, and all its various factions) management education in the landscape of application.

The culmination of the past 60 years of Peter's thinking on the topic of the person and the organization offers managers, educators, change agents, and change thinkers a compelling alternative: a new image of the person and the organization. In this new image, the needs of the organization are *not* conflicted with the needs of the individual but rather contingent on them. Vaill's thinking comes full circle in his final published thoughts in *Spirited Leading and Learning* and his chapter on *Process Wisdom* (2008).

Through his own self-study and observations of the field of management and change, Peter has offered a compelling bridge – to help the current and next generation of change thinkers begin to develop a body of consciousness around "practice wisdom."

New Insights: A Leader's Impact

In addition to the wide influence that Peter B. Vaill has had in scholarship (nearly 3000 citations from various articles are cited through "Google Scholar"), Vaill has also had impact in the field of practice and our own (the authors) work. Dave Jamieson reflected on Vaill's early influence, which for him began as early as 1970. Jamieson writes:

> As a young, new doctoral student at UCLA, we all had a desk in "student cubicles." On one vacant desk there were copies of many articles, working papers of faculty and previous students (most mimeographed!). Many of Peter's early essays were there, for students to read. The earliest concepts that I read about that stuck with me were "practice theory", the "*art* of managing" and "high performing systems" papers. (Some of which were recently

found in my personal archives, that have moved multiple times!) From my doctoral studies to today I had a strong orientation to practice and to develop the capability to lead change. And Vaill's earliest work resonated with me immediately. By graduation, I was already beginning a consulting career and working as a professional association leader.

Almost from the start, the image of the organization as a system was central in my thinking and speaking; additionally high performing teams became a mainstay in my work, as was my continual pursuit of my own "practice theory" which has never abated. In the beginning I chose to pursue a scholar-practitioner life and was passionate about exploring how theory could inform practice and vice-versa. As my experience accumulated, teaching provided the platform to clarify my own thinking on practice. Soon, I began to develop models and frameworks derived from my developing practice to help explain what I was observing. All of my work was informed and supported by others' theories and research, but was always slightly different based on the practice sources. This scholar-practitioner focus enabled me to successfully teach managers and later change agents, as they could relate to the 'practice theories' more easily and found great usefulness in the courses.

Although Peter and I did not meet one another at UCLA (we met much later) Peter's indirect influence on me can be in evidenced by the early writings on the topics mentioned above. Much of my own writing, alone and with others, is heavily influenced by practice or has been written to impact practice. Some of my current presentations express this: "How We Change Needs to Change," "Changing How We Change", "Why Organization Change is so Difficult and What We Can Do about It", "Learning Masterful Practice", "Mastering Consultation" and, "Suppose We Took OD Seriously" explore these current questions. Similar themes are evident in my other writing:

From books such as:

- *The Facilitators Fieldbook (1999, 2006, 2012)*
- *Consultation for Organization Change (2010)*
- *Consultation for Organization Change, Revisited (2016)*

To chapters and articles such as:

- *The Critical Role of Use of Self in Organization Development Consulting (2016)*
- *"Exploring the Relationship between HR and OD" (2015)*
- *"Exploring the Relationship between Change Management and OD" (2015)*
- *"The Practice of OD" (2008)*
- *"Values, Ethics and OD Practice" (2006, 2014)*
- *"Front-End Work: Effectively Engaging with the Client System" (2009)*
- *"Aligning the Organization for a Team-Based Strategy"(1996)*
- *"Design as the Bridge between Intention and Impact" (2015)*
- *"The Heart and Mind of the Practitioner: Remembering Bob Tannenbaum"(2003)*

- *"You are the Instrument"(1991)*
- *"What it Means to be a Change Agent"(1990)*

Finally, Peter and I were both embraced and inspired by Bob Tannenbaum and his central thinking about "use of self." And later, at the University of St. Thomas, although at different times and in different roles, I have continued to both concentrate on leadership, organization development and adult learning and, in the last 10 years, digging deeper into the "use of self" concepts – developing, writing, researching and teaching about it, especially as it relates to helping professionals of all types; and leaders and change agents, in particular. (Jamieson et al. 2013; McKnight and Jamieson 2016) As Peter wrote in his last book:

> . . .all true leadership is indeed spiritual leadership, even if you hardly ever hear it put that flatly. The reason is that beyond everything else that can be said about it, leadership is concerned with bringing out the best in people. As such, one's best is tied intimately to one's deepest sense of oneself, to one's spirit. My leadership efforts must touch that in myself and in others." (Vaill 1998a)

For Jackie Milbrandt, who is currently a doctoral student in the field of organization development and change, Vaill's "permanent white water" and "learning as a way of being" have taken a prominent role in her early impressions in the overall field of study. Milbrandt writes:

> As a newcomer to the study of the field of OD and Change, I first learned of Vaill's work during my involvement with a project involving the *Journal of Management Inquiry's* "Six Degrees" podcast series (JMI Six Degrees 2016). The project involved a team of about a half-dozen interviewers and a list of 50 or more of the great thinkers in OD. The goal of the project was to capture various perspectives on the early and current thinking in the field of OD. Looking through the list, Peter Vaill's name jumped out at me. At the time, I had only really heard of his work through references to him – but that quickly changed. The more Peter and I talked, the more I became immersed in his writing and thinking about the nature of organizations and change. Of his many ideas, two have captivated my imagination and interest. Namely, the connectivity between personal experience and learning, and the perspective that change is not only continuous but accelerating.
>
> My current understanding of "permanent white water" and "learning as a way of being" have shaped my development and how I perceive the challenges of the time. In a world which I experience growing more diverse, complex, and turbulent – it is of critical importance to me to embrace the enormous challenge of learning and sharing what I learn in ways that help people collaborate across different perspectives, time zones, and cultures. This has presented a need for new models and ways of thinking about organizations and change. For myself and others in the field of OD and Change I find an urgent need to learn how to do this in order to function in today's volatile, unpredictable, complex, and ambiguous (VUCA) context (see Bennett and Lemoine 2014; Pasmore and O'Shea 2010). And, I have found myself reflecting on the broader questions – What are the intersections between learning and change? And how can I find ways to support both in organizations?
>
> In a recent presentation (co-facilitated with David Jamieson and Ken Nishikawa at the ODN 2015 titled "Connecting the Dots: Global Communities of Practice in the Field of OD") issues of globalization, the need to balance social and technical systems, and rapid change were at the forefront of the discussion. Reoccurring concerns over how to "develop conditions for psychological safety," "mechanisms to transfer and develop new knowledge" and how to

create spaces for "innovative" and novel approaches were discussed. The depth and attention to which Peter Vaill spent (a life-time) observing, thinking, and writing on these topics – and the insights he offers – in my view make his work relevant and valuable to my own understanding as a current scholar-practitioner and to generations in the foreseeable future.

Legacies and Unfinished Business: Reframing the Human-side of Enterprise

During and after Vaill's time at GW, he made key contributions to various networks and associations he was connected to as a consultant, scholar, and educator. People who worked closely with him over the years expressed their love and respect for him, and his incredible insights, generosity, and creativity he offered to them personally, and the organizations to which Vaill belonged.

As an active member, Vaill held various roles at the Center for Creative Leadership and continued to work with NTL. As a long-standing, active member at the OB Teaching Society (OBTS) and attendee of their annual conference (OBTC) and lifelong member of the OD Network (ODN), he received various honors and awards. In 2002, the OBTS awarded Peter with the "David L. Bradford Outstanding Educator Award." The same year, Peter received the ODN's "Lifetime Achievement Award." A few years later in 2007, he was awarded OBTS's "Peter Frost Mentoring Award." The people who knew him well commented on his ability to make the complex clearer, create spaces for personal reflection, show his own vulnerability, and approach all his work with humility. He was a critically thinking, reflective scholar-practitioner!

And like most good scholar-practitioners, he was integrative, bridging across disciplines, weaving perspectives and concepts together, and producing new understanding.

In a final interview with Peter, he presciently reflected on his current and developing thinking and observations – in three areas:

1. On transforming the image of people-in-the organization to people-as-the organization." Vaill offered:

    For almost 60 years we've been living with a massive misconstruction of the nature of organizations. Since Douglas McGregor published his famous book in 1960, the "Human Side of Enterprise," for the whole of the succeeding 56 years, we've accepted that construction – that there is a human side of enterprise. . . . and then there is all the business stuff; that's a misconstruction. The more correct construction is as follows: There is only one side to organizations and that's the human side. (Milbrandt, July 2016b)

2. On resurrecting the ideas of *spirit* and *purpose* into organizational thinking. On this, Vaill reflected:

    Since World War II almost no one, among the big names so to speak, in behavioral science has attached anything to the human being you might call a spiritual nature. That the feeling of being-that there is a higher meaning and higher purpose; the feeling of having a higher-

self that is up above all this craziness that is in the world. For some people it is the feeling of being blessed, processing or seeking God's grace – for others it is things to do with spirituality. (Milbrandt, July 2016b)

3. On defining leadership as a landscape of practice, Vaill concluded:

And finally, this whole field of practice – we just don't have a good understanding of what practice is – We have theory and then we have the trenches – that is not a deep understanding of practice – so I am working on a whole approach to practice that tries to transform that. (Milbrandt, July 2016b)

Conclusion

While so many in the field were building islands, Peter B. Vaill was building an arc made up of new ways of thinking, practicing, and approaching change through helping the "people who are the organization" renew hope, purpose and spirit in the work. We have some work ahead of us. But where do we begin?

As Vaill so often pointed out, we (as a field at large) have been asking the wrong questions. The vast majority have been looking at the outcomes in organizations "what happened" – instead we might be looking at the processes "what is happening?" We (as a field at large) have been trying to frame practice inside theory – instead we might try to frame theory in practice. As it would seem, in general, we have been barking up the proverbial wrong tree.

In essence, after nearly 60 years in the field of scholarship and practice, Vaill concludes that we have more questions than meaningful answers. He leaves us with some hints to what these may be:

• What do we really know about practice, if we do not question what *it* is?
• How can we support organizational learning and development if we do not more fully understand how *we* are learning and developing?
• How can we expect to understand the whole, if we do not understand ourselves?

As Vaill suggests, it is incumbent upon the next generation not only ask these questions (which are both timeless and timely) but to reflect on them and our experiences to inform our learning and leading change in the twenty-first century. For more than 60 years, Peter B. Vaill has dedicated his life to these questions and more. He has devoted a career to shaping the perspective of the fields of management, leadership, and change by creating "learning" and "learning spaces." Retired now, and no longer teaching formally, Vaill's essays and articles serve as a placeholder for others to explore. The questions posed and the insights shared, through numerous books, articles, and essays, gently beckon to us – inviting, challenging, and coaxing us to embark on a journey into the *art of learning, managing* and *leading change.*

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