CHAPTER 4

Tell Me a Story: Exploring Values in Practice in the Field of Organization Development

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Introduction

Organization development (OD) is consistently described by scholars and practitioners as applied and values-driven field (Beckhard, 1969; Bushe & Marshak, 2009; Jamieson & Worley, 2008). While much has been written on the theory of values in the field, little has been written about values from the perspective of practitioner. Because values influence the way we think, feel, and act (Jamieson & Gellermann, 2014; Rokeach, 1973), it is essential to OD practice (from intervention and design to processes and methods) that dialogue which calls forth a value consciousness be kept alive. In this chapter, the topic of values within and across the field of OD is explored in three stages. First, with an overview of the historic values in the field; second, with an in-depth of account of a three-year collaborative

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research project exploring the topic; and finally, with an introduction to a values exploration process which invites others to join in and expand the conversation.

Values have always been central to the scholarship and practice of OD (Gellermann, Frankel, & Ladenson, 1990; Jamieson & Gellermann, 2014; Margulies & Raia, 1972; Tannenbaum & Davis, 1969; Tannenbaum, Margulies, & Massarick, 1985). Now, more than ever, they seem to play a critical role in informing the identity of professional practice. From how change initiatives are designed to how new interventions are developed, consciousness around core values is of the utmost importance to change outcomes and processes and to identity within the field itself. Therefore, dialogue that calls forth value consciousness must not only be kept alive but be reinvigorated.

For the past 20 years (more frequently in the last decade), scholars and practitioners alike have argued that in order to "reinvent" OD, we need to return to its historic roots and understand the founding values of the field and how these values can be used to inform novel approaches to practice (Bradford & Burke, 2004; Church & Jamieson, 2014; Shull, Church, & Burke, 2013; Vaill, 2005; Wheatly, Tannenbaum, Griffen, & Quade, 2003). At a time when the nature of change and development work in organizations is changing, some have expressed concern that the current field of OD has lost its historic sense of values and, consequently, the innovation, relevance, and purpose the field was founded upon (Bradford & Burke, 2004). As numerous nascent fields of "change" and "development" have emerged (e.g., Organization Behavior, I-O Psychology, Project Management, Human Resource Development, Diversity and Inclusion, Change Management, etc.), lines around the boundaries that have historically defined and differentiated the field of OD have blurred (Ford & Foster-Fishman, 2012). These factors have been discussed in the literature with more frequency and vigor over the last decade as the "crisis in OD" (Bradford & Burke, 2004; Burke, 2011; Shull, Church, & Burke, 2013). From articles which have examined and questioned the relevance of OD's historic methods to those which have expressed a need to "reinvent" it (Bradford & Burke, 2004; Bushe & Marshak, 2009; Greiner & Cummings, 2004), one thing is clear—values play a critical role in the past, present, and future of OD.

In view of this line of thinking, this chapter is an exploration of current values in the field from the perspective of practice. Key contributions

include a process which practitioners can use for reflexive (in real-time) and reflective value exploration, and insights gained from examining three critical questions:

- Are OD's historic values in theory its current values in use?
- What new or emerging values are being used in practice today?
- How can the field deepen the connection between values and practice in order to innovate and revitalize practices in the field?

Background

In an initial exploration of this topic, Milbrandt, Stonsifer, DePorres, Ackley, Jamieson, and Church (2014) wrote an article on the topic of values in OD for a special issue of the *OD Practitioner*. Two key insights were gained as a result: First, research on values from the perspective of practice was long overdue. While there have been recent studies measuring attitudes about values in the field of OD (Church & Burke, 1995; Schull, Church, & Burke, 2013), no recent study that the authors are aware of has explored values from the perspective of practitioner attitudes (beliefs, attitudes, value definitions) and actions (interventions, norms, and practice approaches).

Second, having a rich history that has evolved from the contributions made by multiple tributaries, OD is challenged by diversity in discipline, and more recently by the vast changes in labor, technology, and the economy (Greiner & Cummings, 2004). How can a field that crosses multiple disciplines and countries (and likely multiple value sets) attain value alignment or shared identity?

As Milbrandt et al. (2014) concluded:

> A first step toward re-examining and re-vitalizing the values of the field of OD might be conducting research to map ontology, epistemology, definitions, and norms. This would provide a snapshot of the kaleidoscope of values-related variables and their relationships among OD experiences of practice. This exploration might also result in a heterogeneous view of OD values and contribute to a living and evolving understanding of the field. (p. 17)

Following the research model proposed by Milbrandt et al. (Fig. 4.1), our team set out to explore values within and across the field of OD in hopes of expanding and reinvigorating the topic.

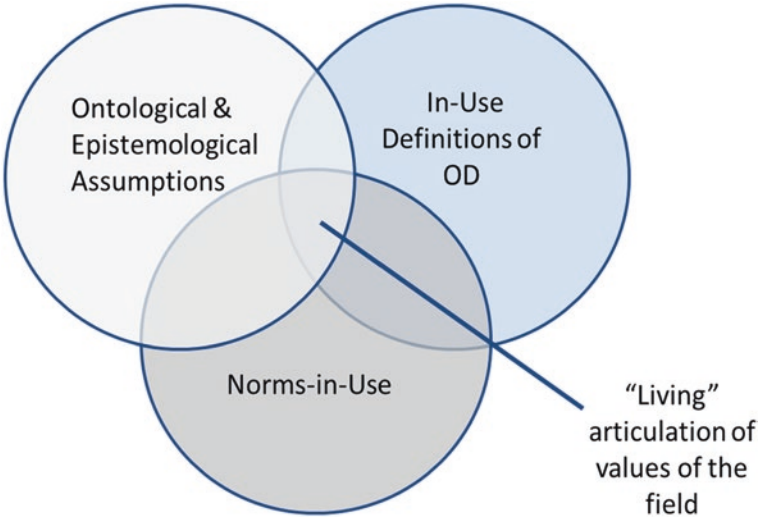

Fig. 4.1 Research model of values in field of OD (Milbrandt et al. 2014)

A Historic Overview of Values in the Field of OD

As a field, OD is considered by most as an applied discipline that emerged out of multiple fields of study (Bushe & Marshak, 2015). Early accounts of the field point back to the 1940s and work that would largely become known through the National Training Labs (NTL). Founded in 1947 by Kurt Lewin, Kenneth Benne, LeLand Bradford, and Ronald Lippitt, NTL began as a series of training sessions meant to explore and experiment with the emerging theories of group dynamics and change processes (Lewin, 1947). NTL's training groups, otherwise known as (T-groups), are what many identify as the source of original energy and theory in the field (Bradford & Burke, 2004; Kleiner, 2008).

At the time of its inception, NTL was infused with thought leaders from a wide array of academic backgrounds and disciplines in the social sciences (Kleiner, 2008; Vaill, 2005). As NTL gained momentum thought leaders across the social sciences would be invited to Bethel, Maine, to attend a variety of the laboratory trainings that were being developed. Students from UCLA, Columbia Teachers College, MIT, and others would participate in the annual lab-centered trainings (French & Bell, 1999). In attendance with students were some of the most influential

social scientists of the time. Theories which became integrated into the labs included those of group dynamics, effects of leadership, and change processes (Lewin, 1947), socio-technical systems (Emery & Trist, 1965), group process and interpersonal relationships (Rogers, 1951, 1961), values and human motivation (Maslow, 1943; Roethlisberger & Dickson, 1939), and team-building and management effectiveness (Argyris, 1957; Likert, 1961). These concepts, emerging in the late 1940s and early 1950s, all found a home at NTL. Experimentation and interplay among these concepts in the NTL labs gave birth to a theory of practice that would emerge in 1960s as OD.

According to French and Bell (1999), the term OD seems to have emerged in the late 1950s "simultaneously, in two or three places through the conceptualization of Robert Blake, Herbert Shepard, Jane Mouton, Douglas McGregor, and Richard Beckhard" (p. 31) (see also "An Interview with Beckhard and Shepard in 1974," *OD Practitioner, 6*[3], 1–8). Perhaps the most widely cited definition of the emerging term in practice is found in a quote by Richard Beckhard describing work he was doing in 1959 with Douglas McGregor at General Mills. Beckhard explained that they didn't want to call it:

> …management development because it was total organization-wide, nor was it human relations training although there was a component of that in it. We didn't want to call it organization improvement because that is a static term, so we labelled the program "Organization Development," meaning system-wide change. (as cited in French & Bell, 1999, p. 32)

In another version, it was Herb Shepard, Robert Blake, and Jane Mouton who around the same time began using the term to describe the "T-group" training they were doing in Baton Rouge. In this context, the term "organization development" was used to describe and differentiate the human relations training they were doing from the management development programs already in place (see Blake & Mouton, 1964; French & Bell, 1999). Recent definitions of the field resonate with Beckhard's emerging one.

For example, Cummings and Worley's (2009) definition of OD as, "a system-wide application and transfer of behavioral science knowledge to the planned development, improvement, and reinforcement of the strategies, structures, and processes that lead to organization effectiveness." In another definition, Jamieson (2012) offers a synthesis of Jamieson and Worley's (2008) key definitions of OD practice stating, "OD is a process of planned and emergent intervention(s) utilizing behavioral and organizational

science principles to change a system and improve its effectiveness, conducted in accordance with values of humanism, participation, choice and development, so that the organization and its members can learn and develop." This and other contemporary definitions have been updated in efforts to keep up with the evolving sense of practice and identity in the field.

No matter how the name came to be, it stuck, along with a core set of values that included humanism (people-centered, relationship focused), democratic and participative choice (focused on including multiple stakeholders from the bottom-up vs top-down bureaucratic management), optimism (hope and belief that people are inherently good and that organizational change can be), and development (learning, growth, and change) (French & Bell, 1999; Jamieson & Gellermann, 2014; Jamieson & Worley, 2008; Milbrandt et al., 2014; Tannenbaum & Davis, 1969).

Values in the Landscape of OD

According to values scholars, values are "generalized, enduring beliefs about the personal and social desirability of certain modes of conduct or end-states of existence" (Rokeach, 1973, p. 5). Furthermore, they are basically "universal" (Schwartz, 2006)—differing not so much in type, but rather how they are prioritized as "hierarchical order of significance" or "value-system" (Gellermann, 1985; Hofstede, Hofstede, & Minkov, 2010; Jamieson & Gellermann, 2014; Rokeach, 1973). Values may be implicit or explicit and exist to varying degrees of consciousness (Rokeach, 1973). Values inform significance, meaning, and need, and desired norms and expectations of behavior (Gellermann, 1985; Jamieson & Gellermann, 2014; Rokeach, 1973; Schwartz, 2006), and as such influence how we think and feel about almost all we do.

From a social constructionist perspective, values are embedded and learned from social interactions. Manifesting in the assumptions, beliefs, stories, symbols, and practices of a group or individual (Cavalli-Sforza, 1993; Hofstede et al., 2010), understanding values and their meaning is a type of tacit knowledge transfer developed over time. In this way, values and more importantly value schemas (significance of order and meaning) have an impact on how things are done (process) and the very nature of the experience (being). What is right or wrong in a given context or situation depends on the interplay between what might be described as nested value systems, or value systems that are operating at various social levels (i.e. individual, group, or organization level). Because value systems can co-exist and differ in the extent they are aligned and inform behavior, values will influence:

- types and frequency of value conflicts,
- logics of desired behaviors (what is right, desired, and good), and
- connections and commitment to other members (i.e. described as the "glue" to *identity* and *belonging*) (Kaplan, 1985; Mandler, 1993; Rokeach, 1973; Schein, 2010).

Consequently, a group or organization's ability to collaborate to achieve goals, overcome conflict, and form consensus depends on how well individual values align with group values (Beckhard & Pritchard, 1992). In light of all this, the complexity of values and values systems that OD practitioners must manage in order to successfully effect system-wide alignment is profound. This may begin to explain how awareness and values consciousness are not only important but critical skills needed to respond to ethical dilemmas (both personal and professional) encountered in the field.

So how do practitioners use values in practice? How do values influence the field's thinking action and ideal or preferred outcomes and states of being? And what can practitioners do to develop a deeper connection between practice and values which may enable a greater values consciousness within and across the field? In order to answer these questions, we reviewed the extant literature related to values in the field of OD.

Connecting Values-in-Theory and Values-in-Practice

From its inception in the 1950s and 1960s, there has never been a single definition of OD values, nor a universally agreed-upon way that the values are practiced (Bradford & Burke, 2004; Church & Jamieson, 2014). This makes understanding the relationship between OD values and practice both elusive and dynamic. Perhaps the most in-depth look at values from a historic perspective of the field can be found in Gellermann, Frankel, and Ladenson's (1990) book, *Values and Ethics in Organization and Human Systems Development*. In it, the authors define values as "standards of importance." According to Gellermann et al. (1990), the value standards can be broken into discrete parts (ethic, morals, and ideals) and, when combined, inform practice and professional identity (p. 131). In an annotated statement, they offer a comprehensive articulation of these values in an attempt to make sense of the meaning and significance of them. We offer an abridged summary of this articulation in Appendix A of this chapter.

Other pioneers in the field also made significant efforts to emphasize the importance of values and values awareness to practice in the field (e.g. Burke, 1977; Church, Waclawski, & Seigel, 1999; Friedlander, 1976; Greiner, 1980; Tannenbaum & Davis, 1969; Tannenbaum, Marguiles, & Massarik, 1985). In an early article, Tannenbaum and Davis (1969) make explicit reference to observable attitudes, thinking, and actions which they describe as enactments of values in OD. In later writing, Tannenbaum et al. (1985) described the importance of value awareness to the practitioner from the perspective the role values play in authenticity and intentionality concluding that values are critical to interpersonal relations and the ability to understand the interplay of differences at various levels of a system (self, group, organization, etc.). They conclude, "The foundational joint values of *self-knowledge* and appropriate *self-disclosure* run the ever-present twin threads through the of labyrinth that is the human condition" (p. 6). Over the course of his career Tannenbaum would continue to emphasize the importance of values in the work of "human systems development," a theme which persists to be a definitive expression to punctuate a humanistic view of the organization.

Likewise, Frank Friedlander (1976) observed the values as tributaries from three divergent philosophical underpinnings: the rational (thinking), pragmatic (doing), and existential (awareness of being). In his essay on the field, Friedlander explores how these divergent perspectives add to the complexity of practice making values consciousness essential to the practitioner. Friedlander argues that understanding the tensions between these tributaries is essential to the maturity of the field and developing the skill to draw upon and balance a unique blend of all three (rationalism, pragmatism, and existentialism) necessary to actualize OD's full potential.

Larry Greiner (1980) observed that values were strongly connected to practice, and over time values shifts created observable shifts in practice. Greiner points to a values shift from the 1950s and 1960s—from an openness, feedback, personal change, and self-awareness to teamwork, integration, and organizational change, respectively, to a shift in the 1970s toward an increasing value of the "bottom line."

Finally, Margulies and Raia (1972, 1988) have written extensively on the topic, offering that while some values may change, those connected to professional identity (which they describe as higher order) in the field may have a more lasting and broader implications to consider in practice. They write,

> OD values provide a beacon or target which represents an "ideal" state toward which the design, structure, and processes of the organization is directed…

> values are implied by the very process of organizational development. The diagnostic process, for example, common to organizational development, stresses participation, openness, and enquiry. (Margulies & Raia, 1988, p. 8).

Margulies and Raia (1988) go on to state that the core values which have endured over the past decade (1960s, 1970s, and 1980s) are perhaps more important to the future of the field than they were at its founding. First, because of what they identify as "the increasing divergence between OD values and those of corporate America," and second, because of what they identify as "unwitting collusion between OD practitioners and a management which appears to be eroding the values of the field" (p. 15). Because of this, they advocate values be "periodically reviewed."

In more recent articles on the topic, we found varied perspectives on the role values play in the current landscape of practice. Minihan and Norlin (2013) commented on the inability to achieve values alignment as a threat to the future of the field. They describe the tendency toward "extremism" in values and toward "counter-dependence" as potential factors contributing to this outcome. They call for a more nuanced or centered values orientation in the field and suggest values be revitalized through creating a sense of shared purpose, core principles, and core professional competencies.

In another recent article by Shull, Church, and Burke (2013), the topic is approached longitudinally, comparing current attitudes about values in the field to those reported in an earlier study (Church and Burke, 1995). Shull et al. (2013) report a decreasing sense of connection to OD's historic values (namely, process and "touchy feely"/relational values) and an increasing sense of connection to outcome values (namely organizational effectiveness and efficiency). Shull et al. suggest revitalization in the field thorough creating innovations in practice (interventions, tools, and methods) designed to meet today's organizational needs.

Finally, a third article by Murrell and Sanzgiri (2011) offers an additional perspective considering the increasingly diverse contexts (globally and internationally) in which OD is practiced. This begs the question as to whether a profession, that crosses multiple fields and multiple countries, can plausibly obtain a values alignment. Murrell and Sanzgiri suggest that rather than seeking to align values, practitioners might develop greater values awareness. They offer a conceptual framework of points to consider in assessing values from a personal, professional, and situational perspective, and so advocate the need for developing values consciousness versus values alignment within and across OD.

In the above discussion of values in OD, the interdependence between values and professional practice is clear. Values in OD are not simply an abstract expression of a desired or ideal end-state (outcome)—they were historically, and remain currently, a synthesis of desired ways of being (awareness), desired actions (doing), a shared sense of purpose and meaning (thinking). When combined, these expressions of values drive practice and outcomes intended to develop the organizations that "we," as a field, serve.

In our review of the literature, we found numerous values and practices articulated (e.g., authenticity, intentionality, congruence, hope, openness, dignity, integrity, self-awareness, etc.), but only a few were named consistently across time, among all the literature we reviewed. Among those consistantly named: humanism, optimism, development (learning), and democratic or fair process (participation, consensus driven, choice, etc.) (Gellermann et al., 1990; Jamieson & Gellermann, 2014; Jamieson & Worley, 2008; Tannenbaum et al., 1985). We considered these enduring values to be core to the OD's historic and current espoused identity, and wondered how these core values, and others, were used, enacted, and embedded in the landscape of practice.

To help answer this question, we engaged in a collaborative inquiry on the topic, examining values from the perspective of the practitioner and their practice. In the following sections, we describe our inquiry in three stages: First, collecting individual practice stories, then holding a values-in-change caucus to further understanding from a broader view of the field, and finally developing a values exploration model which, when put to use, can deepen the relationship between practice values and values-driven change.

Reflecting on Values in Practice Through Practice Stories

Storytelling and values have always been interconnected. We need only look back to the epic poems of Homer or Greek tragedies of Euripides to confirm that storytelling, which informs context and action, is essential to creating shared understanding and meaning. It is through dialogue and storytelling that we learn to interpret actions as good and just, learn what we and others assume to be important or true, and learn ultimately how we relate to others and the world. With this in mind, we began our first phase of the research collecting "practice" stories. Below, we describe the research design, process, and how we made sense of the information after it was collected.

Are OD's Espoused Values Its Governing Values?

First, our team determined our main questions and the limitations of the study to determine how to design and seek participants. Our research questions largely came out of an article co-authored by the primary investigators (Milbrandt et al., 2014). What we hoped to learn was threefold:

- What norms, interventions, and processes are embedded in OD practice today that might inform our understanding of the current values-in-use?
- What theoretical assumptions do practitioners hold regarding these values (espoused values)?
- Are the values-in-use the same as the espoused values?

As we became focused on our questions, we shifted our conversation to the research design. Our instrument was simple and loosely structured (see Appendix C). Operating from the assumption that questions directly addressing values (or any of the assumptions, beliefs, or in-use definitions) would most likely elicit responses reflective of historic and espoused values as opposed to current in-use values, we avoided any mention of values up front. Instead, we relied on an open-ended question, asking participant's "story" about a recent experience in practice, followed by a depth dialogue inviting reflection on values evidenced in the story.

At this phase of the interview, reflection on meaning and values evidenced in the story took place. Both interviewer and interviewee collaborated on making sense of the values (explicit and implicit) evidenced in the story. The interviews concluded with a final question related to values that the practitioner identified were missing from the story, but otherwise part of their practice identity. Although investigator observations of practice were not part of our study, we considered this initial research phase phenomenological in nature because of (1) the effort to capture the lived experience of practice through the thoughts and reflections of the practitioner, and (2) the effort to use the "experience" described in the practice story as the basis for the values reflection.

Our participants in this phase of the research were practitioners we engaged from among our personal networks. Of those in our network, we sought practitioners who met the following requirements: (1) identified as OD practitioners, (2) had at least 10 years of experience in the field, and (3) were currently in practice or had a recent practice experience (within

the last year). Because we were concerned with values of professional practice around the world, we sought participants working in a variety of "culture contexts" and attempted to hold interviews with practitioners who practiced within and outside of the United States. The most difficult groups to access at this initial stage of interviewing were those we categorized as practitioners who "live and practice outside the US." We sorted participants into the following groups:

- practitioners who live and practice within the United States ($n = 7$),
- practitioners who live within the United States, but practice outside of the United States ($n = 4$), and
- practitioners who live and practice outside the United States ($n = 3$).

Over the course of six months, we interviewed and transcribed all 14 interviews.

Analyses, Themes, and Key Insights

To begin the analyses, each transcript was reviewed by several trained volunteer-reviewers (students, scholars, and practitioners). Reviewers were asked to (1) first read the transcripts and (2) re-read, making notes using "descriptive-coding" methods. In general, descriptive coding is concerned with understanding "what is going on here?" In this case, coders were asked to pay special attention to espoused (named) values, practitioner attitudes/beliefs, and descriptions of practices. Once this was done, independent reviewers worked in small groups to build consensus and were asked to work together to collapse individual lists into one theme-coded list. This process was used for initial theming in all 14 interviews and resulted in a total of 200 distilled themes.

Following completion of the distilled themes, a second cycle of theming was done by the principal investigators which sought to further refine the value themes. Looking for repeating themes and collapsing high-frequency theme labels, the list of 200 was reduced to the total 49 value themes.

Next Steps

In general, the research team concluded that the values which emerged in the first phase of research appeared to align with the espoused values

identified in the literature. In other words, we didn't find new values emerge from the data. It appeared that OD's values-in-theory were in fact its values-in-use. This finding, however, elicited other questions: Were the values that emerged in the research specific to the field of OD? Or, were they more broadly used within and across other nascent fields of change? If so, which ones? It was the moment that we determined to expand the conversation.

Expanding the Conversation: Academy of Management Values Caucus

While there are a number of academic disciplines which identify with the work of OD and change (Organization Development, Human Resources, Management, Organization Behavior, Change Management, etc.), OD has always differentiated itself from other fields of study through a primary focus on practice and application. In our investigation, we felt an expressed need to integrate and solicit a variety of perspectives on change and development by inviting as many of these nascent fields of scholarship to join the conversation.

Our primary question became, "How can we expand the conversation?" While many of these disciplines hold their own conferences specific to their academic areas, there is only one place where the authors of the study knew all of these disciplines interact: the annual Academy of Management (AOM) conference. Chosen strategically to expand the conversation and potentially attract a wider and more diverse perspective of values in the field, we submitted a proposal, and were accepted, to convene a caucus on values at the 76th annual conference in Anaheim, CA.

In the AOM 2016 session description, our research group promised to share what we had learned from our previous study and create a dialogue with participants aimed at exploring values-in-use in twenty-first-century change. In this phase of the exploration, our team had a broader set of questions:

- What are the values-in-use in the field of change? and
- How are these values similar or different to the other value themes found in the qualitative analyses?

With these questions in mind, we designed the values caucus at the Academy of Management with the primary goal of expanding the conversation

through interactions with a group of diverse practitioners in the field of OD and related fields.

The Values Caucus

In our initial research, we had sought those who self-identified as OD practitioners; however, at the values caucus, we sought to engage greater diversity—representative of the various disciplines across the field of change (i.e. Human Resource Development, Change Management, Organizational Behavior, etc.). Similar to our early qualitative study, we wanted participants to engage in a dialogue, share their stories, and reflect on those stories. However, we knew that we wanted to test the time this exploration had taken in the interview phase (nearly 30 minutes). In our design work, we thought about what was essential in the process and sought to create an accelerated framework that built on those foundations.

We identified three elements as essential to the process:

- start with a story about a recent or ongoing change;
- have reflective discussion that connects story to values;
- consider how the values evident in the story relate to espoused values in the field.

Our values exploration process used in the caucus was designed toward this end.

An Accelerated Exploration Process

The process used in the caucus was an adaptation from our original interview structure with the intention of being an accelerated design. In the caucus design, each participant had 15 minutes to pair, share, and make sense of their stories using the values lens. Unlike the research interviews, this group began with a working definition of values, and a full view of the process (story to values exploration) that they would use to facilitate the conversation. This section will explain more about the process and the results of what was learned.

To begin the work, we offered a definition of values, which included: (1) a synthesis of beliefs and assumptions about the self and groups to which we belong; (2) what is important to us; and (3) what is right and good. Next, participants were asked to pair up and determine partnership

roles. The process required participants to accelerate what we had done in our interviews from 30–45 minutes to 10 minutes. This meant we had to condense our storytelling timeframe to 5 minutes, allowing 5 minutes of collaborative dialogue which would be done in the paired groups of caucus attendees. Partner "A" would begin telling a story of their change practice, and Partner "B" would take notes and actively listen for values operating in the story. After the completion of the story, participants were asked to engage in a collaborative dialogue reflecting of what values stood out to the storyteller and what values stood out to the listener. As they synthesized their collaborative understanding, they were asked to write a list of those values. Once the partners completed this cycle, they switched roles. Partner "B" became the storyteller and Partner "A" became the active listener. This allowed all participants to collaborate with a partner, teasing out the covert and overt values operating in the stories.

After each paired member shared and reflected on their change story, we asked them to work together for final synthesis of what emerged. What values or themes were in common? Which ones were unique? And how did the values identified in the process relate to values espoused in theory? Through this reflective dialogue, each pair synthesized a final list to share and report out to the caucus group of the whole. As the pairs reported out, facilitators captured the list and synthesized when values repeated or value themes (expressed and principles or practices) were mentioned. At the end of the caucus, with the help of the participants, we emerged with a list of 47 value themes.

Analyses, Themes, and Key Insights

As previously discussed, our key insights at each stage guided the direction of our next steps. In this phase, we were very curious as to how the list of 49 value themes from the interviews would compare or contrast with those captured at the caucus. To determine this, we used multiple coding methods, suitable for this purpose.

First, we used a process of "focused-coding." According to Saldana (2015), the main goal of focused-coding is to sort themes into general groups without paying attention to all the nuances and details the codes may hold, and is an adapted form of axial coding (described below). We agreed on a general framework and process in which two independent reviewers would merge and group the themes. First, each reviewer was to look repeating themes and collapse similar value themes across both lists. Next, each reviewer was to sort value themes into a predetermined

framework containing three categorical buckets: (1) espoused values/value labels, (2) beliefs/attitudes, and (3) practices.

Next, we used axial coding to synthesize the work of the two independent reviewers into a single values-theme table. Axial coding, like the axial of a wheel, helps to reconnect the dimensions and properties (characteristics or attributes) on a continuum, paying special attention to components such as context, interactions, and conditions of a process that helped to make sense of the sequence and relationships among the labels that explained the if, when, how, and why among the categories. Special attention was given to the relationship between the supra-categories (the value cluster and value labels) and sub-categories (attitudes/beliefs and practices). The final cycle also grouped the value labels into value clusters to show what emerged as values and their manifestations in practice. See Table 4.1.

The more we talked with practitioners and listened to practice stories, the more apparent it became that there were varying degrees of intentionality or awareness in how practitioners used values in their work. Although most practitioners seemed to easily link the choice of their approach to a value, few described an intentional value approach as part of their typical practice.

Next Steps

These observations left us both satisfied and curious. We were (1) satisfied that we had found saturation among our data (values expressed in both prior phases were consistent across time and participants—we didn't feel like we found "new" values) and (2) curious that in most cases the value manifestations (beliefs/attitudes/practices) did not seem particularly overt, or intentional. This last observation held strong implications for professional practice and the field itself. This left our group with two provocative questions: (1) If most practitioners were not intentionally selecting values-in-practice, then how did the selection of values-in-practice occur? And (2) what impact would greater intentionality of values have in the field of change?

Because the values that emerged from the caucus were highly saturated with those that had emerged from the interviews, and many seemed to endure across time, we determined that it was not a matter of re-codifying OD values, but rather deepening the connection between values awareness and their intentional use in professional practice. For the next six months, our group collaboratively experimented with a process designed to do just that.

Table 4.1 Values-in-theory and values-in practice theme table

Value Cluster	*Value label*	*Belief/Attitude*	*Practices*
Humanism	Relationships	Organizations are human systems; reality is socially constructed	Develop relationships; pay attention to/manage conflict; pay attention to social exchange dynamics (power, knowledge, structures for interaction)
	Empowerment/ Human Dignity	Belief in doing the work where the client is; that the work belongs to the worker	Help individuals feel successful; individual choice; providing frameworks and letting the client fill-in the content; use of self-agency; setting conditions for people to actualize their potential
	Humility	It's not about me; focus on serving the client	Recognize own imperfections; do inner work
Process	Participative	People embrace what they help create	Engage *ALL* stakeholders; persisting until everyone is on the same page; co-creation in identifying challenges and possibilities with client; making sure all voices are heard; work toward consensus in decision-making; get full participation
	Data-Driven	Use data to raise awareness and shared understanding (sense-making); use data to gain clarity	Determine what is known and unknown by clients; use to develop coherence across the system; co-investigate with clients; feedback data to various levels in the system; use data to drive conversations on decisions; use data for collective sense-making
	Whole System	See the system as client; need to work holistically at multiple levels	Pay attention to social and technical needs attention; clarity of roles; working toward clarity with data; work on multiple levels; pay attention to power dynamics; effective use of timing (sequencing, leveraging, considering how variables connect)
	Values/Culture Sensitivity	Culture exists to preserve itself; need to understand the informal vs. formal system	Pay attention to personal/group values and alignment/ differences of values; pay attention to how conflict is managed (collaborate, avoid, etc.); look at not only what happens but how

(*continued*)

Table 4.1 (continued)

Value Cluster	*Value label*	*Belief/Attitude*	*Practices*
	Marginality	Need to be able to separate self from the system; need to be able to speak truth to power	Understand the client (values, culture, system dynamics) when creating a change approach; balancing personal and client values; suspend judgment
	Collaboration	Focus on the collaboration with client system, and among the client group and team level	Make sure everyone is working together toward common goals; working with leadership and at all levels of system;
Optimism	Openness/ Inclusion	Need to be transparent; be accepting of others	Creating space for communication on differences; be forthcoming; avoid collusion; seeking diversity in thought and perspective
	Authenticity	Being true to self; encourage others to be true to themselves	Modeling (walk the talk); build trust through honesty and integrity; maintain confidentiality
	Hope	Belief that all people are essentially good; things will work out	Being positive; patience (as a way of being); don't flee the hard things; focus on a desired future state; have courage and encourage others
	Helping	Do no harm; meet the client where they are	Honor where your client is coming from
Development	Learning	Need for continuous learning and growth	Build capacity within the system; using data to develop understanding; teaching and learning as a recursive process; developing leadership; teach the process;
	Curiosity/ Inquiry	Should not prescribe solutions	Use of inquiry; suspending judgment
	Flexibility	Need to be adaptive and flexible; change is iterative	Redesign and recalibrate as you go; have a willingness to learn and change
	Awareness	Need to deal with your own stuff; know thyself	Reflection; self-evaluation; be true to yourself; use self as instrument

A Values Exploration Model: Testing the Mechanism

In order to better understand how values awareness might be translated into practice, we experimented on the theme. What began as collaboratively reflecting on what we had learned, in some cases, transformed into a type of action research. At times, our bi-monthly check-ins would have updates on what came of the values insights that we had discovered in prior conversations. As we continued to meet, we developed a running list of questions and experimented with sequence and depth. We also discussed what we had learned from the previous research phases. We explored what was unique and common among them.

In phase one, we discovered that the simple act of telling a story of practice brought about new insights and values awareness. In phase two, we discovered that by introducing values as part of the storytelling framework, we accelerated that process. In a concentrated effort to combine the "discovery" of values to a process of "accelerated" value awareness, the "5A Values Exploration Cycle" was born!

To test the process design, we experimented as a collaborative. Each took turns as storyteller, interviewer, or note-taker/observer. The more we experimented, the more excited we became. Each story had some unique insights, gave further credibility to the process, and allowed our group to create shared ideas about values at the intersection of change and development work. We also found out where limitations may be in the design. For example, after several rounds as storyteller/listener, we determined that the role of the listener was one more suitably described as facilitator in that it required both familiarity with the values topic and skill in asking deepening questions. We also found that the value label was not as reliable as a value enactment (illustration, description, example) to create shared value meaning.

Values, we found, were something of an elusive phenomenon. In some cases, easily identified in the telling of the story. In other cases, completely hidden. We found that having a skilled listener who could interact with the details of the story and pay attention to what the storyteller chose to share, include, or even leave out of the story was incredibly helpful in navigating what were at times hidden or unknown dimensions within the story. The role of the facilitator became something of a shadow consultant.

In final iterations of "testing the mechanism," we expanded the conversation to include participants who *did not identify as OD practitioners*. We did this in order to determine if and how this process could be used to develop values awareness across a wider base of professionals. We reframed

the focus of the story from "experiences of OD practice" to "experiences of change." We found on average that the process took 15 minutes, when facilitated. We also found that the experience of the process in each case brought new insights and useful strategies and clarity in what we identified as "confusing" and "sticky" situations. Below, we offer a general overview of the process model and a narrative of how to use it.

The 5A Values Exploration Cycle

The underlying objective in developing this process model was to create something practitioners could use to *intentionally* develop values awareness and consciousness in practice. While its development, we experimented, adapted, and considered various uses that were specific to OD and beyond. Figure 3.2 can be used independently by the practitioner or can be used in combination with others (co-facilitators, clients, collegues) to guide the conversation. Our experience has been that the latter (in conversation with others) provides a more robust experience and has multiple implications for practice. To accompany the model, a brief explanation of each phase is provided, followed by implications for the field and immediate next steps (Fig. 4.2).

Fig. 4.2 The 5A value exploration cycle

Step 1: Ask
The process begins with an open-ended question: "Tell me a story about a recent experience of OD/change." This is followed by supporting questions, such as:

- What is (was) going on that seemed important?
- What are (did) you noticing (notice)?
- What do (did) you think needs (needed) to be paid attention to?

Step 2: Amplify
This step looks at the emerging critical values in the story. Key questions at this stage focus on what was standing out in terms of values related to "what was noticed." In some, the listener can ask clarifying questions. In others, they can launch into deepening questions, as below.

- What values did you notice in the story specific to you? Which of your core values stand out for you?
- What values stand out for others? What values did you notice existing outside of yourself?
- What was triggered in what you noticed? What "interactions" or "triggers" help me better understand this situation?

Step 3: Align
This step examines the interplay among values/value systems of self, clients, and other stakeholders asking key questions. Framing the question in terms of a value definition is important.

- Where are my values aligned or not in this story?
- What or where are others' values aligned or not?
- What can I do to optimize awareness of this? For myself and others?
- What were the internal and external factors influencing this situation/context?
- Were the values across the system aligned?

Understanding where values aligned, or where they did not, became critical to answering the next question—what is the right or best way to respond?

Step 4: Act
This phase in the 5A model is extremely helpful in "real-time" change stories, where deciding what to do was still at the forefront. However, it is also helpful in reflection of recent or continuing events.

- From a values perspective, what is (was) the best way to respond?
- What processes would best enhance and support values that emerged as important?
- What would theory tell me?
- What would practice tell me?

Step 5: Assess
The process ends with a reflection of the conversation: examining key thoughts, meanings, takeaways, and explorations of what is possible. This model is unique in its ability to build internal reflection on values and value reflexivity. The experience the model frames is one in which the value learning emerges from not only hearing the story, but the telling of it.

- What outcomes are (were) anticipated?
- What outcomes have been fulfilled?
- What did I learn?
- What are next steps?

Implications and Next Steps

The ultimate driving force following the completion of this research was to provide a method for others to explore and develop awareness of the potential differences and interplay between personal, client, stakeholder, and system values. Additional research that expands understanding of how values are and can be used in practice in ways that improve change process and outcomes would be invaluable to field. Methods such as case studies, that may capture emergent processes used in developing values awareness and value-based practices are particularly promising. Further experimentation and exploration on values-in-practice may be one of the best ways to prepare OD practitioners for working in a diverse set of change environments, in an increasingly complex field.

As a research group, our immediate next step is to continue the effort of expanding and enlarging the conversation. As much as we learned from designing the "5A Value Exploration Cycle," we feel it must be experimented with by a broader cross-section of the field. To do this, our team

will use the forum of the 2017 annual Academy of Management Meeting testing the capability of the mechanism through a Professional Development Workshop (PDW). The objective of this will be twofold: (1) develop greater awareness among scholars and practitioners of values enacted and (2) explore the use of and the needs of both reflexive and reflective value awareness processes. These processes are pertinent to ensuring values-based change is put into practice through self-awareness and the awareness of others' values that are involved in the change process.

Concluding Thoughts

As the twenty-first century—defined by globalization, the information age, and technological innovation—ushers in what has been described as the era of "permanent white water" (Vaill, 1989), organizations and the field of OD must begin to seriously address the pressing questions of our time.

- How are we changing the way we approach change?
- How will we ensure the practices of OD are relevant in the future?

Because values can be individual or collective, implicit or explicit, and exist at varying degrees of consciousness, we see *Values Exploration Cycle* as a call to action, for all participants in the field of OD, and those in related fields of change and development, to join us in expanding the conversation. We see this chapter as neither the beginning nor end of the work, but rather as an ongoing effort to make meaningful engagement and connection within and across the field. As we learned in our own experiences over the last three years, values inform not only our experiences, but also meaning. They provide the glue and connection of shared understanding and purpose. As we explore our values together, we develop deeper insights and connections to "who we are," "what is important and good," and "what works and helps." In this way, the process becomes the practice, and the circle between us closes.

Appendix A: Abridged List of Beliefs, Values, and Ethics of OD (Summary from Gellermann et al., 1990, pp. 111–184)

Abridged List of Beliefs

- All human beings are equal.
- Human beings are interdependent and thus connected.

- Human beings have freedom and responsibility (freedom to act and function according to their own needs, desires, and path to growth).
- Organizations are human systems.
- Organizations are open systems.
- Organizations are unique and dynamic.
- As professionals, we aspire to help people realize their highest potential.
- As professionals, we enable people to align with one another and their environment.
- As professionals, we recognize the importance of both process and task.
- As professionals, we seek to serve the greatest good.
- As professionals, we see values and ethics as simultaneously interacting at various levels of the social system—from the individual, interpersonal, societal, etc … and as such place importance on values alignment.

Abridged List of Values

Fundamental Values

- Life and the quest for happiness
- Freedom, responsibility, and self-control
- Justice (serving in the interest of fairness and equity)

Personal and Interpersonal Values

- Human Potential and empowerment
- Respect, dignity, integrity, and worth
- Fundamental Human Rights
- Authenticity, congruence, honesty, openness, understanding, and acceptance
- Flexibility, Change, and pro-action

System Values (May Also Be at the Personal and Interpersonal Levels)

- Learning, development, growth, and transformation
- Widespread meaningful participation in system affairs, democracy, and appropriate decision-making

- Whole-win attitudes, cooperation-collaboration, trust, community, and diversity
- Effectiveness efficiency, and alignment

Abridged List of Ethical Principles, Moral Rules/Ideals

Moral Rules/Ideals

- Do no harm
- Prevent harm or lessen the potential harm suffered by anyone.

Ethical Principles

- Serve the good of the whole
- Do unto other as we would have them do unto us
- Always treat people as ends never only as means; respect their being and never use them only for the ability to "do."
- Act so we do not increase power by the most powerful stakeholders over the less powerful.

Appendix B: Organization and Human Systems Development Credo (July 1996)*

Retrieved from www.odnetwork.com (see also source of Credo published as in Gellermann, Frankel & Landenson, 1990, pp. 374–376.)

We believe that human beings and human systems are interdependent economically, politically, socially, culturally, and spiritually, and that their mutual effectiveness is grounded in fundamental principles which are reflected in the primary values that guide our practice. Among those values are: respect for human dignity, integrity, and worth; freedom, choice, and responsibility; justice and fundamental human rights; compassion; authenticity, openness, and honesty; learning, growth, and empowerment; understanding and respecting differences; cooperation, collaboration, trust, diversity, and community; excellence, alignment, effectiveness, and efficiency; democracy, meaningful participation, and appropriate decision-making; and synergy, harmony, and peace.

We believe further that our effectiveness as a profession, over and above our effectiveness as individual professionals, requires a widely shared commitment

to and behavior in accordance with certain moral-ethical guidelines. Among them are: responsibility to self-acting with integrity and being true to ourselves; striving continually for self-knowledge and personal growth; responsibility for professional development and competence—developing and maintaining our individual competence and establishing cooperative relations with other professionals to expand our competence; practicing within the limits of our competence, culture, and experience in providing services and using techniques; responsibility to clients and significant others—serving the long-term well-being of our client systems and their stakeholders; conducting any professional activity, program, or relationship in ways that are honest, responsible, and appropriately open; responsibility to the Organization Development-Human Systems Development (OD-HSD) profession—contributing to the continuing professional development of other practitioners and of the profession as a whole; promoting the sharing of professional knowledge and skill; social responsibility—accepting responsibility for and acting with sensitivity to the fact that our recommendations and actions may alter the lives and well-being of people within our client systems and within the larger systems of which they are subsystems.

*The moral-ethical position on which the OD-HSD profession is based, along with the beliefs and values underlying that position, is more fully described in "An Annotated Statement of Values and Ethics By Professionals in Organization and Human Systems Development." This *credo* is based on that Annotated Statement.

*The global perspective does not mean changing the focus of our practice, but only the context within which we view our collective practice. And by shifting our paradigm of who "we" are, we can become a global professional community whose collective action will have global significance based on both our practice and ways in which we "walk our talk."

ODN Statement of Values Published in "Principles of Practice" Statement in 2003

The practice of OD is grounded in a distinctive set of core values and principles that guide behavior and actions. Values-based key values include:

Respect and Inclusion—equitably value the perspective and opinions of everyone.
Collaboration—build collaborative relationships between the practitioner and the client while encouraging collaboration through the client system.

Authenticity—strive for authenticity and congruence and encourage these qualities in clients.
Self-awareness—commit to developing self-awareness and interpersonal skills. OD practitioners engage in personal and professional development through lifelong learning.
Empowerment—Focus efforts on helping everyone in the client organization or community increase their autonomy and empowerment to levels that make the workplace and/or community satisfying and productive.

Appendix C: Interview Guide for the Lived Experiences of OD

The lived experience of OD practitioners

Criteria:

- Currently practicing
- Minimum of 10 years

Targeted Sample for Interviews:

- Live in United States practice in North America (5 participants)
- Live in United States and practice internationally (5 participants)
- Live internationally and practice internationally (5 participants)

Interview Protocol

1. Describe an actual consulting experience that you've had within the last year, utilizing an example that illustrates your typical approach to OD practice.

   Subsequent questions:

   (a) Based on your example, when you think of the values that drive your practice, what values were in evidence?
   (b) What OD values do you hold as a practitioner that were not evident in this story?
   (c) Is there anything else you'd like to add, that may not have been part of this story, which relates to your experience-in-practice of OD values?

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