

CONCEPTUALISING ORGANISATION DEVELOPMENT:  
PRACTITIONER AND ACADEMIC PERSPECTIVES  
A UK STUDY

ANNE CLARE GILLON

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## **Abstract**

This thesis compares academic and practitioner perspectives on the profession of Organisation Development (OD) in the UK and how it had evolved over four decades. The aims of the research were to find out if there were differences in perspectives between these two communities and identify the areas where there was diversity. In seeking explanation for why any variance occurred, the theories of Institutionalism, Fashions, Fads and the Dissemination of Management Ideas were applied.

The work is situated within a Critical Realist ontology and in the research strategy three methods were applied. Content analysis was carried out on job advertisements in the trade press from over a four decade period. This method was used to gain information on changes in magnitude in the take up of the profession in the UK and significant developments in the content of the job roles over the period. To triangulate this data, semi-structured interviews were carried out with twenty one subject experts, from the UK academic, senior practitioner, business leader and leading influencer communities. The third method was a bibliometric search, this was applied to understand who was dominating thought on what constituted OD.

The main findings were that there was significant difference between the academic and practitioner perspectives, both on the level of presence and in the form of the OD profession in the UK. Other findings were that USA scholars dominated thoughts on OD and its content, but their rhetoric did not reflect the nature of the profession in the UK. In terms of the development of the profession, recently a degree of isomorphism was found, with respect to motivation to move the profession to a more institutionalised status. Agency was found to be a factor in the shaping of the profession in form of a quest for career advantage.

This research was original in that it was the first study to collect empirical evidence on the form of the OD profession in the UK and in the application of the three

methods selected. Theories of Institutionalism, Fashions, Fads and the Dissemination of Management Ideas had not previously been applied to identify forces at work in the development of this professional grouping.

This research should be useful to the practitioner community in terms of understanding how they might best continue to develop and to academics for them to reflect on the extent to which their prior work on the study of this profession has been relevant. Possibilities for future research include collecting further detail on the development of the profession in other countries and also understanding how the OD community can make a greater contribution in global and societal change processes.

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## Preface

*'The professions dominate our world. They heal our bodies, measure our profits, save our souls. Yet we are deeply ambivalent about them. For some, the rise of professions is a story of knowledge in triumphant practice. It is the story of Pasteur and Osler and Schweitzer, a thread that ties the lawyer in a country village to the justice on the Supreme Court Bench. For others it is the sadder chronicle of monopoly and malfeasance, of unequal justice administered by servants of power ...'*

(Abbot, 1988:1)

Those in the professions of medicine, the law and the clergy might have an extremely significant impact at critical moments in our lives. That cannot be said for those who consider themselves to be Organisation (or Organisational) Development (OD) professionals. However, throughout our adult years, most of our waking hours are spent in work mode. The efforts of OD practitioners might not be present in acute life situations, but any profession which could contribute to our existence as human beings at work must surely be of importance.

## Chapter 1. Introduction

### The Beginnings of a Puzzle

As with all research, this project has been an ongoing and iterative work. The author first became motivated to study the difference between academic and practitioner perspectives on the development of the OD profession in the United Kingdom (UK) in 2008. This resulted from her experience of a move from a practitioner to academic career in 2007, and being keen to identify a subject of personal interest and relevance for research. She had previously held a senior practitioner job role which had both Human Resource (HR) and OD in the title. Whilst she had had formal post graduate education in HR, she was less confident on having had such a firm and comprehensive education in and foundation on theory from the field of OD. Therefore, OD seemed to be an ideal topic for research.

The author's impression was that OD was deemed by practitioners to be a particularly important and influential specialist area within HR. She was therefore keen to understand the academic perspective on OD and as a first step took a random sample of HR texts from library bookshelves. She examined book indexes for reference to OD, and was surprised and perplexed to find no references to OD. This did not correspond with her perception of the importance of OD in the HR practice world, and aroused her curiosity. A small scale exploratory study was carried out to confirm her perceptions of the importance of OD amongst practitioners using content analysis data from 2008, and subsequently published in 2011 (Gillon, 2011).

After commencing the project leading to this thesis, in late 2009 she again examined the prevalence and importance of OD roles in HR practice, by initially examining at a small sample of job advertisements through the online job search facility on the (Chartered Institute of Personnel Development (CIPD) website. In this search, 6 relevant advertisements were identified that had OD in the job title. Two of the job roles were for 'Head' of function roles, one of which was for a 'Director of

*Organisational Development*’ with a ‘Salary: £105000 - £110000 per annum + excellent package’. In 2009, this was arguably a very high salary for a professional role, indicating that irrespective of the status of OD amongst HR scholars, some organisations did consider it to be valuable and important.

The author subsequently repeated the survey of library literature in preparation for a presentation to practitioners, by searching a selection of HR core textbooks. On this occasion, the search was less random and titles were specifically chosen as being expected to include reference to OD, such as *Human Resource Management Theory and Practice* (Bratton and Gold, 2012), *The Strategic Managing of Human Resources* (Leopold and Harris, 2009), and *Contemporary Human Resource Management Text and Cases* (Redman and Wilkinson, 2009). However, again no index listings for OD were found in any of these textbooks. In ‘*The Strategic Managing of Human Resources*’, the ‘Quakers’ made the reference list. So it appeared to have been judged that the *Quaker Movement* was deemed of relevance to *Strategic HR*, but OD was not.

## Research Aims and Research Questions

### 1.2.1 Research Aims

In the early stages of this study the broad aim was to investigate the nature of the profession of OD in the UK, and whether this had changed over the period of forty years between 1970 and 2010. As part of the work for this thesis, the content analysis data from the first tranche of research was written up and published (Gillon et al., 2014a). This tranche of research focused on a comparison between the evolution of the OD profession in the UK and the United States of America (USA). The data on the magnitude (i.e. extent) of the presence of job roles with OD in the title, between 1970 and 2010, fed directly into the findings of this thesis. Following the publication of that research, the focus reverted to the exploration of the evidence of findings of variance in the academic and practitioner perspectives on the UK form of the OD profession.

Having found evidence of a difference between academic perspectives on, and practice of, OD the initial broad aim was developed to include an investigation of how the profession had developed in UK; why it had developed in that way; and what and who had influenced change(s). The two communities whose perspective on these issues was of interest were OD professionals and OD academics. Additionally, the study aims to apply theoretical perspectives to identify the forces of influence in operation in the development of the profession in the UK.

### **1.2.2 Research Questions**

From this research aim, the following research questions were developed:

1. To what extent is there a difference between the academic literature and practitioners' perspective of the development of the OD profession in the UK?
2. What does the empirical data of this study evidence on the development of the OD profession in the UK in respect of its form, magnitude and perceived importance?
3. What are the forces at work which influence the development of the OD profession in the UK?

The research questions are also set out in the context of the research strategy in the methods chapter (Chapter 4). These questions will be revisited in the concluding chapter.

### **1.2.3 Research Methods Adopted and the Theoretical Proposition**

Three methods were adopted to address the research questions. The first comprised content analysis of job advertisements with OD in the title over a period between 1970 and 2010, in order to assess representation of changes in the magnitude and form of the OD profession in the UK. This data was collected with the purpose of providing a comparator with the depiction of OD in the academic literature.

The second method was a bibliometric search, which aimed to provide a quantitative measure of who was publishing journal articles, reports and books with

OD in the title, when they were published, and as far as possible to clarify the national context of the work. It was hoped that this data would identify sources of authority in the development of OD and any changes in trend on that influence.

The third method utilised semi-structured interviews with OD, HR and Human Resource Development (HRD) subject experts. A range of academics, senior practitioners, business leaders and leading influencers were interviewed to gain an understanding of variance in perspectives from these different communities, and the data compared with scholarly work on OD.

Institutional theory and the diffusion of ideas, fashions and fads in management were selected as being appropriate theory through which to analyse the data and understand the forces at work in the development of OD. In terms of the author's wish to achieve her aims, the context of Whittington and Mayer's (2000: 4) proposition was applied: *'Between the extremes of universalism and contextualism, we conclude for the value of a modestly generalizing social science of management'*.

It is not contended that this study will result in an *objective and generalizable truth* on the development and form of OD in the UK. Nevertheless, it is intended is that through the adoption of these methods the study will produce a '*modestly generalizable*' understanding of the development of the OD profession in the UK.

## Summary of chapters

### **Chapter 1. Introduction**

This chapter has introduced the background and context of the study, and summarised the research aims and research questions. A summary of subsequent chapters is also provided below.

### **Chapter 2. Theoretical Proposition**

This chapter explains the ontological approach adopted for the study, and presents the theoretical propositions of institutionalism, fashions, fads and the dissemination of management ideas.

### **Chapter 3. Literature Review**

Chapter 3 provides a comprehensive review of literature on OD. It details the origins of the term *Organisation Development*, and outlines its definition, boundaries and history. The chapter also provides a description of traditional OD and the context and challenges around core OD in the UK, with reference critiques of OD, debates on its value and the prognosis for its future.

### **Chapter 4. Methods**

This chapter introduces the broad research aims, questions and strategy, explaining and justifying the choice of methods used: content analysis, semi-structured interviews with subject experts, and the bibliometric search. Limitations of the study are identified.

### **Chapter 5. Findings Content Analysis and Bibliometric Search and Chapter 6.**

#### **Findings Interviews**

The findings from the three different forms of data collection are presented in Chapters 5 and 6.

### **Chapter 7. Discussion**

This chapter comprises 3 parts. Part 1 discusses discrepancies between the OD literature and data collected in this study. Part 2 compares insights from the theoretical positions with the data collected for this study. Part 3 examines debates on the value of OD, contemporary OD and the prognosis for its future.

### **Chapter 8. Conclusion**

The concluding chapter delivers a summary of the key findings of the study, considers its originality and contribution to knowledge, and provides a review of the way in which the research questions have been answered. It discusses the implications of the findings for OD practice, professional associations and academics. Areas for further research are identified.





## Chapter 2. Focal Theory Positioning

This chapter will set out the theoretical position through which the research findings will be analysed, and provide justification for the adoption of a critical realist ontological stance in relation to the study of the profession of OD in the UK. It will explore the change and development of professions, the nature of professions, what is known about them as entities in terms of their evolution, and the role of professional associations.

The phenomena of isomorphism (DiMaggio and Powell, 1991) in Institutional Theory will be examined in terms of how it influences the nature of the development of institutions. Scott's (2008a) three pillars of institutions, and the implications of this typology such as legitimacy, agency and the carriers for change, are considered. Three of the four perspectives on change and innovation in management practice (Birkinshaw et al., 2008) will be examined, i.e. as well the institutional perspective, issues of fashion and rationality will be reviewed. With respect to rationality, consideration will be given to matters relating to: the forces of agency in the development of professions; non-isomorphic change and the influence of institutional factors on the Dissemination of Ideas; Fashions and Fads; and irrational forces for change in management.

### The Philosophical Context of the Subject under Study (OD) and the Adoption of a Critical Realist Stance

To contextualise the ontological and epistemological stance selected for this work it is useful to reflect on the nature of OD and the extent to which it assumes inherent ontological and epistemological positions. It is also important to acknowledge the relevance of the origins of OD research and practice, and changes in the discipline since its foundation.

OD is considered to have its roots in applied behavioural science (French and Bell, 1978). There are many published definitions of OD, such as that of French and Bell (1978: 53) who define OD as having:

*'four major stems: (1) the invention of the T-group and innovations in the application of laboratory training insights to complex organizations, (2) the invention of survey feedback technology, (3) the emergence of action research, and (4) the evolution of the Tavistock sociotechnical and socioclinical approaches.'*

French and Bell (1978: 53)

The reference to *'behavioural science'* is regularly included in descriptions of OD (see Stanford, 2012: 43), and reports on the origins of OD make reference to the *'critical work of the National Training Laboratory ... The birth of the T group and other forms of laboratory education ... The development of survey research methods'* (Cheung-Judge and Holbeche, 2011: 13) which reinforce the foundation of the discipline in a positivist tradition. This suggests that OD may fall within a positivist ontological position, which might be assumed for the topic under consideration in this study.

However, challenging this position, Garrow (2009: 4) notes that *'since the early days of OD, a new worldview has emerged to question the existence of objective reality'*. Even in a comparatively early view of OD, variations in values, assumptions, beliefs, power and politics imply that it is not such a simple discipline to locate in terms of its philosophical leanings (French and Bell, 1978), and in 1998, Schein and Beckhard (PAGE v) stated that *'there was no one OD philosophy'*. As such, contemporary OD has been portrayed as being underpinned by *'constructionist assumptions and methodologies'* (Francis et al., 2012: 5). For example, Marshak (2006) labelled *Classical* and *New OD*, with *Classical* OD methods premised on *'the existence and validity of an objective discernible reality'*, whilst *New OD* is based on postmodern and constructionist approaches (Marshak and Grant, 2008: S9). Whilst the classification of *Classical* and *New OD*, appears to have marked currency in academic quarters in the UK and USA, there is nevertheless dispute on this

categorisation of two phases of OD, with Burnes and Cooke (2013) arguing instead that it has had a long and continuous history.

Reflecting this ongoing change in the underpinning philosophy of OD, the 2010 National Training Laboratory (NTL) conference focused on the debate around *'whether OD has shifted significantly from positivism: objective reality; one reality; planned and episodic change'* to *'social constructionism: multiple realities; complexity; non-reality, self-organizing change'* (Cheung-Judge and Holbeche, 2011: 189). According to Burnes and Cooke (2013), OD encompasses a continuously evolving body of theory and practice which has proved capable of incorporating and developing new ideas, perspectives and approaches: discarding old ones as circumstances change. Furthermore, they claim that in assuming categorisation of early OD as being positivistic, the recent debate does not pay homage to the pluralistic origins of OD. From its inception with Lewin, the founding father of OD, work on OD could have been considered to sit comfortably in multiple realities: socially constructed, socially negotiated and interpretative philosophical approaches (Burnes and Cooke, 2013).

It is important to contextualise contemporary approaches from the UK, USA, Europe and New Zealand in relation to approaches applied in the field of OD and how this informed the ontological approach used in this study. Many respected OD scholars have described the field in terms of metaphors and discourse (e.g. Jacobs and Heracleous, 2006; Oswick and Grant, 1996; Grant and Marshak, 2011).

However, within the aligned discipline of HRM, there has been a focus on the measurement of HRM in relation to performance from esteemed academics (see Pauwe and Boselie, 2005; Tootell et al. 2009; Lahteenmaki et al., 1998). HR Analytics is the newest form of this approach (see Fitz-Ens, 2010) and the focus for study in Lancaster's Centre for Performance Led HR. This metric centred direction on the contribution to the bottom line has also been used in OD (see Flamholtz and Hua, 2002). In short, the discipline of OD was, and is, ambiguous in relation to its underpinning philosophical assumptions.

To investigate the pluralistic discipline of OD, an ontological approach which accommodates an open and critical selection of method is required. This has led to the pragmatic adoption of elements of Critical Realism as applied to organization studies (Edwards et al., 2014). Critical Realist epistemology includes the identification of social structures (Bryman and Bell, 2011), which is pertinent to this study given that the role of social structures will be considered in examining how the profession of OD has become institutionalised. As outlined by Bhaskar, (1989: 2):

*'we will only be able to understand – and so change – the social world if we identify the structures at work that generate those events and discourses ... These structures are not spontaneously apparent in the observable pattern of events: they can only be identified through the practical and theoretical work of the social sciences'*

Furthermore, critical realists distinguish between the objects of their study *'and the terms they use to describe, account for, and understand them.'* (Bryman and Bell, 2011: 17).

The Critical Realist approach has been influential in the broad positioning of this work, as will be explained in more detail in Chapter 4. In particular, there is much to be gained from an engagement between Critical Realism and New Institutionalism (Mutch et al. 2006). As a study which straddles the eras of *Classical OD* and *New OD*, and with continuing diversity in approach across the discipline of OD, an ontological position which embraces contradiction was deemed appropriate.

In addition, the application of institutional analysis as a theoretical lens fits with an interdisciplinary approach which draws on knowledge from across the social sciences (Thornton et al., 2008). Institutionalism seeks to demonstrate the impact of social environment on organisations (Whittington, 2001), and inherent within Scott's (2008a) three pillars of institutionalism is the paradox of the requirement to correspond with profoundly different ontological positions.

## Professions as Institutions and the Role of Professional Associations

To identify theories of relevance for analysis, the nature of this study on the profession of OD as a development and change in an organisational field as discussed by DiMaggio and Powell (1991) was considered. OD fits within Abbot's (1988: 8) description of professions as being '*exclusive occupational groups applying somewhat abstract knowledge to particular cases*'. Professions are one of the seven forms of institution: family, community, religion, state, market, profession and corporation (Thornton et al., 2012) and as such, Institutional Theory is suitable for application in this study. Moreover, there is precedent for treating professions as institutions, for example, in the work of Scott (2008a, 2008b).

Institutional Theory raises relevant questions about the world of organisations. Why do organisations, such as professional groupings, in similar fields come to resemble each other; and does the behaviour in organisational settings '*reflect the pursuit of rational interests and the exercise of conscious choice, or is it behaviour primarily shaped by conventions, routines and habits?*' (Scott, 2008a: ix).

Institutional Theory also raises the question of '*why and how laws, rules and other types of regulative and normative systems arise*': what is the nature of interests, and do they arise from cultural construction or are they a facet of human nature? (Scott, 2008a: ix).

According to Scott (2008a), the diffusion of structures and practices in institutions, such as professions, is unpredictable and not always in line with the characteristics of the organisation in which they sit. Furthermore, it is useful to question the extent to which cultural beliefs have an influence in the operation and nature of organisations (Scott 2008a). The reason why individuals are disposed to conform to institutions is of interest: did they do so because they felt morally obliged, could they have conceived of nothing other than conformity or were there rewards for them if they were following the rules? Finally, what is the balance of stability and

change, *'if institutions control and constitute individuals, how can individuals hope to alter the systems in which they are embedded?'* (Scott, 2008a: x).

When viewed as institutions, Institutional Theory considers professions to be *'...comprised of regulative, normative and cultural cognitive elements that, together with associated activities and resources, provide stability and meaning to social life'* (Scott, 2008a: 48). In the context of understanding and analysing changes to, and developments of, a professional area, Institutional Theory has also been employed by esteemed scholars (Greenwood et al. 2002; Greenwood and Suddaby, 2006; Scott, 2005; Scott, 2008b; Suddaby et al., 2006). Additionally, the place of professions is implicit in *New Institutionalism* with the isomorphic nature of their structuration, *'the gradual maturity and specification of roles, behaviours, and interactions of organizational communities'* (Greenwood et al., 2002: 59).

When viewed as institutions, professions are seen as forming relational networks, with personal expertise as the source of legitimacy. Professional associations provide a source of authority, and identity comes from personal reputation and the quality of craft. In addition, status in professions is important and as such, a good strategy for professionals is to increase their personal reputation. Personal capitalism is considered to be the economic system of professionals (Thornton et al., 2012). Further features of professions include distinctiveness; practice underpinned by *'formal knowledge'*; autonomy in managing work; and *'norms espousing a service orientation, and certification by the state'* (Scott, 2005: 120). The influence of professionals in organisational life is emphasised by Scott in his analogy on dance (Scott, 2008b). When reflecting on *'who is calling the tune?'* and *'who is supplying the choreography?'* Scott (2008b: 219) judged professions to be the *'Lords of the Dance'*. In similar sentiment, professional institutions are important enablers of *'formation and reproduction of shared meanings and understandings'* (Greenwood et al., 2002: 61).

In a national context, the UK and USA have a common history in the development of professional occupations that preceded the maturation of a strong central state,

and this has had an effect on the development of professions as *'free'* professions (Scott, 2008b: 220). However, generalising on the development of professions across nations should be avoided (Scott, 2005), as differences in educational and state systems play a pivotal role on how professions develop. Muzio et al. (2011) propose that although national context is important, professions may nevertheless have power which takes precedence over the influence of a central functional administration, an organisation, or the state. In light of Scott's (2008b: 219) portrayal of professions as the *'Lords of the Dance'*, Muzio et al. (2011) contend that the consumers of professional services do not have any power in their relationship. Whilst this might be true for professions such as medicine and the law, it is arguably less so for a profession like OD.

### **1.2.1 The Role of Professional Associations**

Professional associations are powerful in managing the boundaries of a given profession and can act as referees in disputed territory, shaping the nature of the development of their particular community (Greenwood et al., 2002). Historically, a sociological view of professionals was that they controlled their work terrain (Abbot, 1998; Muzio et al., 2011). To understand the transformation of a profession, Greenwood, et al. (2002) studied accounting profession in Canada, reflecting on how changes in jurisdiction were endorsed by the relevant professional associations. Underlying the idea of jurisdiction is the assumption of territorial competition between professions (Abbot, 1988): often an issue for discussion in the domain of organisational population ecology theorists.

There are three important facets of professional associations (Greenwood et al., 2002). Firstly, they act as collective representatives within and to the external world, encouraging interaction of the communities through which norms of behaviour and conduct are developed. Secondly, shared categorisations are developed through relations with other communities as well as within the particular professional community. Lastly, professional associations supervise observance of coercively penalised and normatively encouraged expectations. Practices and

beliefs become taken for granted and are embedded through processes such as certification, membership criteria, education and training, and rituals of celebration. Professional associations act as gatekeepers: they control role titles and who can provide what services legitimately whilst using particular role titles (Muzio et al., 2011).

Empirical change within professions tends to move them towards differentiation and the intensification of internal complexity (Scott, 2008a). Specialisation and fragmentation can be found within primary professions; so, for example, some might consider OD and HRD as being specialisms which have developed within HR. In addition, there are an increasing number of professionals who do not practice but are employed in areas such as education, policy and administration. There are also parallel and subordinate functions (Scott, 2008a), and OD could be considered as a parallel or subordinate function of HR (or vice versa).

Moreover, there are tendencies within professions to follow routines, with work being increasingly mechanised and an increasing formalisation and consolidation of knowledge (Scott, 2008a). In terms of exogenous change, there has been an increase in the size, number and social power of the professions and a change in the character of the clients, to which the professions have, in turn, been responsively changing. In professions such as accounting and the law, there has been greater integration of offering a 'one stop shop' service to clients (Scott, 2008a).

### **1.2.2 Isomorphic Pressures for Change**

An underpinning concept of Institutional Theory is that institutions, such as professions, are remarkably similar to other institutions in their field (Scott 2008a), and that this convergence is arrived at through the application of isomorphic forces. Furthermore, the forces driving the convergence are not necessarily rationally underpinned, as the changes do not necessarily make the institution more efficient (DiMaggio and Powell, 1983).



DiMaggio and Powell's (1983) *Iron Cage Revisited* is considered highly influential in founding the concept of isomorphic change which is embedded in the principles of *New Institutionalism* (Greenwood and Meyer, 2008). DiMaggio and Powell (1983) identified three different isomorphic forces at work: *coercive, normative and mimetic* pressures (see Greenwood and Meyer, 2008):

(1) '*... coercive mechanisms, which occur when external constituents on which an organization is dependent or cultural expectations in the society within which organizations function cajole or force organizations to change in a certain way; ...*' (2) '*... normative mechanisms, which arise primarily from professionalization projects; and ...*' (3) '*... mimetic mechanisms, which occur when organizations copy successful role models either because their actions are believed to be rational or because of a desire to avoid appearing deviant or backward*'

(See Greenwood and Meyer, 2008: 261 - 262)

Thornton et al. (2012) provided a useful summary of DiMaggio and Powell's (1983) propositions:

1. If an organisation is dependent on another organisation, it will move towards a similar climate, structure and behavioural focus as the other organisation.
2. If an organisation has a highly centralised and dependent resource supply, it will develop to become like the organisation on which it relies.
3. If an organisation exists in a context where the path to goal achievement is uncertain, then it is likely to imitate an organisation it considers to be successful in the same field.
4. There is a link between how unclear an organisation's goals are, and the extent to which it will mimic another organisation.
5. Organisations which are dependent on academically qualified employees will become more like other organisations that are reliant on this type of human resource mix.

6. Where an organisation has a high proportion of managers with professional body affiliation, then it will increasingly become like others in the same field.
7. The more dependent a number of organisation are on a small number of sources, the more these organisations will become alike.
8. The extent of state involvement will influence the similarity of organisations, with those more engaged with the state becoming more like each other.
9. Where there are fewer alternative models, the speed with which organisations become alike will quicken.
10. Uncertain goals or technology will increase the likelihood of organisations being similar.
11. With higher levels of professionalisation density, comes greater institutional isomorphism.
12. The degree of structuration has an influence on the extent of isomorphism.

Whilst in common parlance the label of institution may imply long term stability and even stagnation, it is misleading to consider institutions to be inert as they are continually evolving (Greenwood et al. 2002). Furthermore, Whittington (2001) notes that institutional theorists should draw more on the work of Giddens' structuration theory which clarifies that as actors follow patterned social activity involving relations, rules and utilisation of resources, they contribute to the ongoing production and reproduction of social structures (Scott, 2008a).

## **The Three Pillars of Institutions, Legitimacy, Agency, Carriers and Relational Networks**

### **1.3.1 The Three Pillars of Institutions**

DiMaggio and Powell (1983) provide an explanation of three forms of isomorphic change forces driving change in institutions. In developing further understanding of the nature of and change in professions as institutions, Scott (2008a:50) defined the three pillars of institutions as consisting of '*regulative*', '*normative*' and '*culture-cognitive*' elements. The *coercive*, *normative* and *mimetic* forces identified by DiMaggio and Powell (1983) are reflected as mechanisms in Scott's depiction of the three pillars of institutions as outlined in Table 2.1 below (Scott, 2008a: 51 Table 3.1).

The *regulative* pillar refers to the way in which institutions limit and constrain members. It also denotes the extent to which rules are policed to maintain compliance with set regulatory processes. The *normative* pillar refers to values enacted through evaluative and prescriptive concerns. Social obligation is fundamental, with pride and honour coming from acting in accordance with traditions, whereas disgrace and shame serve as a controlling sanction to those who step outside the norms. The *cultural-cognitive* pillar has elements fundamental to institutions (Scott, 2008a). According to Scott, institutions '*take seriously the cognitive dimensions of human existence: mediating between the external world of stimuli and the response of the individual organism is a collection of internalized symbolic representations of the world.*' (Scott, 2008a: 57).

DiMaggio and Powell (1991) contend that the institution of professionalism is normative in nature and that professionals adopt norms, for example, by taking a stance on moral obligation which goes far beyond that required by regulation (Scott, 2008a). It is also imperative for institutions to have social legitimacy (Meyer and Rowan, 1997; Greenwood and Meyer, 2008), since if their place is not secure they risk losing support and resources. It is also important for organisations to

	<b><i>Regulative</i></b>	<b><i>Normative</i></b>	<b><i>Cultural-Cognitive</i></b>
<b><i>Basis of compliance</i></b>	<i>Expedience</i>	<i>Social Obligation</i>	<i>Taken-for-grantedness</i> <i>Shared understanding</i>
<b><i>Basis of order</i></b>	<i>Regulative rules</i>	<i>Binding expectations</i>	<i>Constitutive schema</i>
<b><i>Mechanisms</i></b>	<i>Coercive</i>	<i>Normative</i>	<i>Mimetic</i>
<b><i>Logic</i></b>	<i>Instrumentality</i>	<i>Appropriateness</i>	<i>Orthodoxy</i>
<b><i>Indicators</i></b>	<i>Rules</i> <i>Laws</i> <i>Sanctions</i>	<i>Certification</i> <i>Accreditation</i>	<i>Common beliefs</i> <i>Shared logics of action</i> <i>Isomorphism</i>
<b><i>Affect</i></b>	<i>Fear Guilt / Innocence</i>	<i>Shame/ Honor</i>	<i>Certainty / Confusion</i>
<b><i>Basis of legitimacy</i></b>	<i>Legally sanctioned</i>	<i>Morally governed</i>	<i>Comprehensible</i> <i>Recognizable</i> <i>Culturally supported</i>

Table 2.1 Scott's Three Pillars of Institutions (Scott, 2008a: 51 Table 3.1)

reflect 'socially constructed reality' through structures within their domain (Greenwood and Meyer, 2008: 261).

The ideas in Institutional Theory link well to a typology of intellectual social systems where the dominant structures are professional and academic (Whittington, 2001). The basic resources in that typology are expertise and legitimacy, the basic rules are provided by professional codes, and the predominant organisations are professional bodies and universities (Whittington, 2001). All of these issues are relevant to OD, how it has developed as a profession, and of particular relevance to its legitimacy, which is explored further below.

### 1.3.2 Legitimacy

Legitimacy provides social power for institutions. It is of key importance to their status, and institutions will develop and change in order to achieve further legitimacy (Scott, 2008a). Literature tends to assume that organisation change is driven by rational aims (Ashworth et al., 2007). However, *Institutional Theory* provides an alternative motive for organisational change: the motive of achieving legitimacy through meeting stakeholder's expectations (Ashworth et al., 2007). Legitimacy is important to professions to ensure that they avoid being viewed as pushing for the adoption of fads or fashions. In Scott's (2008a) three pillar model different conceptualisations of how organisations achieve legitimacy are included. The *regulatory* pillar proposes that legitimacy is legally sanctioned; the *normative* pillar proposes that legitimacy is morally governed; and the *culture-cognitive* pillar proposing that legitimacy is achieved through comprehensive recognition and cultural support (Scott, 2008a).

OD professionals may be employed within organisations or be organised independently as consultancy professionals, which raises questions about the extent to which facets of professionalism, such as legitimacy, differ. For example, would a professional actor be perceived differently if they were employed in an independent consulting capacity than they would if they were working as an organisational employee (Scott, 2005)? Muzio et al. (2011) applied the regulatory pillar in an examination of the legitimacy of management consultants, noting that that there was no professional association grouping and little in the way of

qualifications or standards for management consultants in the UK, and that there were *'permeable boundaries to the occupation – there being no legal restriction on who might practice as a consultant'* (Muzio et al., 2011: 807).

### 1.3.3 Agency

Whilst legitimacy is the change that institutions seek to achieve, it is through *agency* that the social actors exert themselves to engender change in institutions. This thesis will address the phenomena of *agency* as employed by social actors in more depth than is common in an Institutional Theory approach (Mutch et al., 2006). It will do so as a result of the emphasis placed on the importance of the relationship between agency and structure, in this case professions, in organisational theory and analysis (Reed, 2003). The concept of *agency* proposes that actors have an impact on their social world: they possess causal power and can alter relational networks, rules and resources (Scott, 2008a). Human agency can be defined as *'the temporarily constructed engagement by actors of different structural environments – which, through the interplay of habit, imagination, and judgement, both reproduces and transforms those structures in interactive response to the problems posed by changing historical situations'* (Emirbayer and Mische, 1998: 970).

Agency in the institutional context has many guises, some of which are contradictory. Professional associations can play an agency role through behaving as principal regulatory agents. As such, they can be conservative in nature, reinforcing existing rules, practices, conventions and norms (Greenwood et al., 2002). However, professional associations can also take a leading role in legitimising change, by facilitating discussion, debate and by *'reframing professional identities'* and how these are presented to the external world (Greenwood et al., 2002: 59).

There are two forms of agency the first *'stems from the internal ambiguity and plurality of the rules governing the reproduction of particular sets of social structures'* (Whittington, 2001: 704). In this conception of agency, multiple rules exist and agents operate in a number of social systems simultaneously, and can

draw from a range of diverse resources (Whittington, 2001). However, actors are viewed as having only partial autonomy from social structures, with their cultural context having an impact on their power and agency. Whittington (2001) explored whether managers actively gain agency by exploiting tensions arising from deviating structural principles (Thornton et al., 2012). The second form of agency arises '*from the external contradictions between a system's intrinsic structural properties and ... alien rules and resources*', from members with multiple other affiliations or from cross cutting system relationships (Whittington, 2001: 704). In the case of OD professional, multiple affiliations could be within a professional context of OD and HR, or OD and consultancy. It could also arise from the business context (e.g. the sector) in which they work. The second form of agency can be of greater significance in that it challenges systems logics.

In terms of power, when faced with uncertain and complex tasks organisations have been found to favour the use of professional norms to enhance the predictability of outcomes (Scott, 2005). However, in some cases professionals were found to use their monopoly of power to out-rank managers' hierarchical control. In this way, professions could gain power within organisations by successfully dealing with significant sources of uncertainty (Scott, 2005). Professionals were also found to have claimed moral superiority in the terrain of ethics, as '*the social trustee model of professionalism stresses the altruistic, civic minded, moral aspects of professional status*' (Scott, 2005: 125). However, in the arena of business professions, technical competence is considered to be of greater importance.

Status can also be an issue in the institution of professionalism with a difference in status potentially having implications, raising questions about the extent to which agency is deployed to move to a higher status version of the profession. Normally inherent in the idea of institutionalisation is that that change cannot come from within. However, studies have shown that change has come from calculative and interest aware parties that were found inside a professional community (Greenwood and Suddaby, 2006). Professional populations are not necessarily

formed from homogenous communities, and intra-professional boundaries and membership criteria can be constructed and maintained by professional associations (Greenwood et al., 2002). In this context, sub-groups may have competing interests, meaning that consensus is temporary.

An additional perspective is where there is a drive for change within a profession. In this perspective it is assumed that the drive for change comes from the periphery of the field where institutional contradictions are more at play, there is less privilege, and '*organizations are less embedded*' (Greenwood and Suddaby, 2006: 29). Three reasons are put forward to support this perspective: in terms of other organisations, those on the periphery are less connected and therefore less likely to be embedded in norms of the profession; with tenuous connections to field level institutions, they are not aware of the expectations; and they are likely to be disadvantaged, and therefore more in favour of change (Greenwood and Suddaby, 2006).

Moreover, professional groupings more prosperous in resources were found to have no imperative to imagine beyond the established traditions which suit their interests, and in which they may have already invested considerable time and resources which served those traditions and interests (Greenwood and Suddaby, 2006). However, compliance with this approach may involve a significant threat to institutions if they fail to adapt to exogenous jolts, as there may be contradictory values in the institution, and the gap between the disadvantaged and privileged may be so great that it would act to destabilise the status quo (Greenwood and Suddaby, 2006). Therefore, on occasion entrepreneurial change may come from the centre, precisely because the centre can '*exemplify embedded agency*' and have the power to promote change (Greenwood and Suddaby, 2006: 30).

#### **1.3.4 Carriers**

As described above, social actors apply agency to achieve change in the legitimacy of their institutional status. Scott (2008a) provides information on the carriers for



change, set out in the three pillars model below (Scott, 2008a: 79 Table 4.1):

	<b><i>Pillars</i></b>		
<b><i>Carriers</i></b>	<b><i>Regulative</i></b>	<b><i>Normative</i></b>	<b><i>Cultural-Cognitive</i></b>
<b><i>Symbolic Systems</i></b>	<i>Rules Laws</i>	<i>Values Expectations</i>	<i>Categories Typifications Schema</i>
<b><i>Relational Systems</i></b>	<i>Governance Systems Power Systems</i>	<i>Regimes Authority Systems</i>	<i>Structural isomorphism Identities</i>
<b><i>Routines</i></b>	<i>Protocols Standard operating procedures</i>	<i>Jobs Roles Obedience to duty</i>	<i>Scripts</i>
<b><i>Artefacts</i></b>	<i>Objects</i>	<i>Objects meeting conventions, standards</i>	<i>Objects possessing symbolic value</i>

Table 2.2 Institutional Pillars and Carriers in Scott's Three Pillars of Institutions

### 1.3.5 Relational Networks of Institutions

The patterned interconnections between networks are central to the concept of relational system carriers in Scott's (2008a) three pillar model shown above.

Patterned interconnections allow for the flow of new ideas, relational commitments and modes of behaviour. Habitual behaviour and routines serve as carriers to embed institutional practices and norms, as they '*rely on patterned actions that reflect the tacit knowledge of actors – deeply ingrained habits and procedures based on unarticulated knowledge and beliefs*' (Scott, 2008a: 82).

Professional institutions operate in networks, with other institutions of similar and non-similar forms acting in "'sets" or "communities"' (Greenwood et al., 2002: 59).

Professional institutions' influence on each other is a focus of interest for Greenwood et al. (2002) who examines the extent to which there is meaningful

regular and ongoing interaction directly between them. Joint discussion and development of practice often takes place, underpinned by the creation of regulatory process sanctioned and policed by, for example, professional associations or the state (Greenwood et al., 2002). Through this process the objectification of categorisations may be developed, reproduced and disseminated. In this way, legitimisation and social reality is created by social actors (Greenwood et al., 2002).

### 1.3.6 Non-Isomorphic Change and its link with Fads and Fashions

As outlined earlier in this chapter, an assumed context of institutionalism is that the nature of change is isomorphic. However whilst the driving forces for change may be isomorphic, they may instead be non-isomorphic. Greenwood et al. (2002: 60) provides an overarching model of the stages of non-isomorphic change, which is shown below in Figure 2.1.

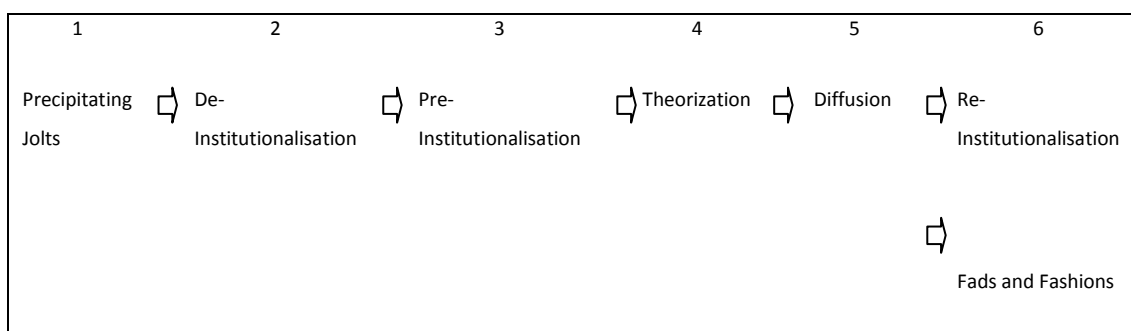


Figure 2.1 The stages of non-isomorphic change

In this model, change is thought to be preceded by precipitating jolts, either from within or outside of a professional institution. These jolts may come from technical and / or social upheaval, or from change in regulation or competition which results in a phase of de-institutionalisation causing a disruption in consensus in the socially constructed field. Change may be accompanied by an ascendance of actors, with new players emerging and evidence of institutional entrepreneurship. The model includes a pre-institutional stage during which organisations seek their own workable technical solutions and independent innovation (Greenwood et al., 2002).

Greenwood et al., (2002) note that attention to the theorization stage (stage 4) of the model is often neglected. Since abstract and formal knowledge constitute elementary facets of professions this is a fundamental phase in institutional change (Abbot, 1998; Scott, 2005). In the diffusion stage the institutional changes '*become - "objectified" and through their pragmatic value gain social consensus and legitimacy with further diffusion continuing from this*' (Greenwood et al., 2002: 61). The model provides two alternatives in the final phase: change can be integrated, re-institutionalised or become a fad or fashion.

## **Management Fads, Fashions and the Diffusion of Management Ideas**

In addition to institutionalism, this research also includes consideration of theory on Management Fads, Fashions and the Diffusion of New Ideas in Management. With regards to Fashion, many scholars implicitly or explicitly describe OD practice, assuming a period during the 1960s and 1970s when it had been more or less in vogue in the UK. The received wisdom on OD as having fashionable status during that time is exemplified by the esteemed HR academic Karen Legge, who referred to OD '*Even in its heyday ...*' (Legge, 2005: 212). Legge (2005) refers to OD as having been fashionable in the 1960s and 1970s, but then dying out as a result of its incongruence with management style in the UK. In its early years, OD in the UK was considered to be socially manipulative and '*hard nosed line managers were highly sceptical of this development in personnel management*', finding the social concern of OD to be too distant from their imperative to optimise commercial performance (Legge, 2005: 54).

Disillusionment with OD and its placement as an out of date fashion was attributed to beliefs that the costs of OD outweighed its benefits, and that the social system approach was no longer politically fashionable. This led managers and academics to become increasingly critical of OD (Gill and Whittle. 1992). The environment in which OD practice operated was considered to suggest a lack of theoretical

foundation, euphoria, and inadequate understanding and diagnosis (Gill and Whittle, 1992), and more variability occurred in OD trends than in any other main trends (Huczynski, 2006).

This section will examine the conceptualisation of Fashion and Fads, and the Diffusion of Ideas in business and management generally, focusing on the extent to which this illuminates incidences of transience in the adoption of OD practice (Huczynski, 2006).

#### **1.4.1 Fashion and Fads**

The manifestation of fashion, or being fashionable, can be defined as: '*1 conforming to fashion; in vogue 2 of, characteristic of, or patronized by people of fashion ...*' (Harper Collins, 2009: 598). The features of these definitions which may have most relevance for this research are those features concerned with ideas and concepts that are most recent; most admired; not designed to last; conforming to set norms; and artefacts / ideas patronized by a particular individuals who identify themselves as being a member of a particular group.

Theories of Fashion tend to be dominated by the aesthetic perspective which tends to give rise to fashion being traditionally viewed as being negative, trivial and something which academics should distance themselves from, in order to avoid being considered as '*snake-oil salesmen*' (Abrahamson, 1996a: 255). However, Management Fashions should not be considered to be a subset of, and therefore subjected to the same vagaries as, aesthetic fashion (Abrahamson, 1996a).

A lack of respect for the profession of management and management theory, and the associated lack of legitimacy, opened up the field of business and management to quick fixes and fads (Hilmer and Donaldson, 1996). In longer established professions such as medicine, law and engineering, quick fix practices based on unsubstantiated ideas would not have been entertained from those without an established professional or academic track record (Hilmer and Donaldson, 1996). The proliferation of fads and quick fixes in the field of management arose as a result

of its comparative immaturity as a discipline. In addition, managers considered it un-palatable that issues were too complex for simple solutions, and that longer term, sustained approaches were required (Hilmer and Donaldson, 1996). National values and culture played a role in Management Fashions, their duration and their frequency Abrahamson (1996a). Whilst professions such as medicine, pharmacy and teaching are honoured and respected in the Western world, managers tend to be less highly regarded (Hilmer and Donaldson, 1996).

Management Fashion developed to close gaps in organisational performance, which are generated by the pressure of technical and economic forces (Abrahamson, 1996a). Managerial fashions therefore wax and wane in response to macroeconomic fluctuations (Abrahamson, 1996a). It is the role of academics and consultants to aid managers in applying fashions, through providing information on ideas that will help them be successful in the face of competitive pressures (Abrahamson, 1996b). However, socio-psychological needs are in competition with techno-economic circumstances in Management Fashion demand (Abrahamson, 1996b). Managers seek certainty in an unpredictable world in order to minimise confusion and threat (Huczynski, 2006), favouring the use of professionals to enhance predictability of outcome when faced with uncertain and complex tasks (Scott, 2005).

Embracing ambiguity in management choices may be a more successful strategy (Grint, 1997). A traditional Western polarised binary approach, of bad / good and effective / not effective is becoming increasingly irrelevant in increasingly complex internal and external environments (Grint, 1997). Management gurus typically connect easily with management consumers as they can provide comfort by providing information that management consumers already know (Jackson, 2001). Measurement in management tends to be inherently fuzzy; concerned with subjective measurement such as an individual's performance. Even areas such as financial performance or production targets can be ambiguous (Grint, 1997). In this increasingly complex and unpredictable context, there is an argument that whilst it

is normal for managers to seek to find certainty in solutions, applying fuzzy logic solutions might be more productive (Grint, 1997).

However, in this fuzzy world, academics have a role to play in unpacking the jargon and models put forward by management gurus (Collins, 2000), and to work with consultants *'to debunk dysfunctional management fashions caused by socio-psychological forces'* (Abrahamson, 1996b: 617). These fashions arise out of three psychological states: *'(a) frustration, (b) boredom ..., and (c) striving for status differentiation'*, with Management Fashion satiating these needs (Abrahamson, 1996a: 271). Linking back to potential motivation for deploying agency as described in Institutional Theory above, a further view on the drivers of socio-psychological forces in management are that they are: *'propelled by two human instincts: fear and greed'* (Micklethwait and Wooldridge, 1997: 9). Additionally, where socio-psychological needs have been met through a successfully applied idea, this then results in a positive feeling *'which can be called revelation'* (Huczynski, 2006: 237).

Management Fads are often perceived even more negatively than Management Fashions. A fad can be defined as: *'1 an intense but short-lived fashion craze, 2 a personal idiosyncrasy or whim'* (Harper Collins, 2009: 590). This definition suggests a particularly short passing trend but also a lack of rationality in adoption and application. In management publications, there is a range of judgement on Management Fads with them being viewed as being from the trivial, to being extremely useful and effective (Carson et al., 1999). An alternative and more positive perspective on fads is that they are *'managerial interventions which appear to be innovative, rational and functional and are aimed at encouraging better organizational performance'* (Carson et al., 1999: 321).

Management fads and fashions have been presented as following a lifecycle (Carson et al., 1999; Gill and Whittle, 1992; Jackson, 2001) or, as Abrahamson (1996a) proposed, a series of lifecycles. Abrahamson defined four stages of the lifecycle of fads: invention, acceptance, disenchantment and decline. Nevertheless, what might have been considered as a fad at inception can, at some point, prove to

be of sufficient use and benefit that it is translated into accepted practice (Carson et al., 1999). Furthermore, tried and tested management theory, philosophy and practice can be found at the root of many fads, in line with the *'it's all old wine in new bottles'* analogy (Warren, 1996).

There is also a paradox in the selection and adoption of innovative approaches, as whilst managers want new ideas, they also want new and novel ideas to be sufficiently like that which they already know (Huczynski, 2006), tending to reject radical ideas which challenge their existing knowledge framework. As such, in seeking to embrace fresh ideas, managers tend not to want these to be too far-reaching (Huczynski, 2006). Managers' reactions to new knowledge can be summarised in three broad categories: 1) this is what I already know, this knowledge has no additional value to me; 2) this is so fundamentally different to what I know that it attacks my world view, I therefore reject it and can find rational reasons to justify the rejection; or 3) the idea is new, it means that I will need to review my framework of knowledge, however it will be beneficial and worth the effort to embrace this new idea (Butler, 1986).

The likelihood of a Management Fad developing into a longer term trend, tends to be based on the extent to which it:

- '(1) fits with the basic culture and values of society;*
- (2) offers significant benefits, in terms of both number and strength;*
- (3) is adaptable to the specific needs of an organization;*
- (4) addresses the underlying causes of a problem rather than a symptom;*
- (5) fits with other common interventions and programs in place (for example, TQM and MBO programs are antithetical in that their basic tenets are contradictory); and*
- (6) is supported by key users and proponents as well as by objective assessments of effectiveness.'*

(Carson et al., 1999: 325)

Academics should be wary of rejecting popular culture in management ideas, since fashionable ideas will likely have an impact on the world of work. If for no other reason than its adoption in practice, popular thinking must be given scholarly attention (Jackson, 2001). Academics could do worse than to study the communication forms of management gurus, since understanding successful communication channels may provide lessons (Jackson, 2001). This is especially important given that management is an oral tradition and managers prefer to hear and see new information rather than to read it (Huczynski, 2006). If academics make more effort to engage with the managerial community and help them to understand how to apply critical evaluation and objective viewpoints, this could be to their benefit (Jackson, 2001).

#### **1.4.2 Diffusion of Management Ideas**

The Diffusion of Ideas is an additional aspect of fashion which has particular importance to management knowledge. Diffusion can be defined as: *'the process in which an innovation is communicated through certain channels over time among the members of a social system'* (Rogers, 2003: 5). As with fashions in management, it is not always the most rationally effective innovation which is adopted (Rogers, 2003). Rogers (2003) proposed that the technical merit of an idea is not what leads to successful adoption, and that there are four main elements in successful diffusion: the first element is that there is an innovation; the second that there must be effective channels of communication of the innovation; the third is the element of time; and the fourth is the social system through which adoption occurs (Rogers, 2003).

In the implementation of an idea, adopters may vary the innovation by customising it to their preferences. The communication channel through which most adopters are influenced is the *'subjective evaluation of an innovation that is conveyed to them from other individuals like themselves who have already adopted the innovation'* (Rogers, 2003: 18 - 19). This, combined with study of social system



networks, differing characteristics of early and late adopters, and the role played by opinion leaders, are important influences to consider (Rogers, 2003).

There is much rationalised myth accepted in developing institutions (Meyer and Rowan (1991). Pro-innovation bias, which is the extent to which it is presumed that innovation will provide positive benefits for organisations, is a dominant perspective in the Diffusion of Innovation literature, akin to *efficient choice* (Abrahamson, 1991). Also included in the typology of the four perspectives in the adoption of innovations, are the *forced selection*, *fashion* and *fads* perspectives (Abrahamson, 1991). This categorisation is intended to explain the choice of whether to adopt technically efficient, but also technically inefficient, innovations (Abrahamson, 1991).

The two assumptions upon which the first *efficient choice* perspective is based are an assumption that organisations are free to choose and have certainty about their goals, and an assumption that adoption of the innovation would further those goals (Abrahamson, 1991). In contrast, in the second *forced selection* perspective, external conditions act as drivers for change. For example, groups such as trade unions and governmental institutions can exert sufficient power to force adoption (Abrahamson, 1991).

The assumptions underpinning the third *fashion* perspective is that environmental conditions, such as those in the wider economic environment, lead to a high level of uncertainty in achievement of organisational performance (Abrahamson, 1991). In the Diffusion of Management Ideas, the perceived safest route is to imitate other organisations by seeking the view of fashion setters such as business media and consultants (Abrahamson, 1991). This perspective could be on occasion linked to DiMaggio and Powell's (1991: 70) assertion that normative pressure for change often stems ... '*from professionalisation*'. By following normative influences, decision makers can appear to be making rational choices, to the extent that they do not stand out from the norm (Grint, 1997).

Abraham's (1991) typology on the fashion perspective also noted that when lower reputation organisations adopt a fashion, then higher reputation organisations may seek to disassociate themselves from them by adopting new fashions (Abrahamson, 1996). This idea is also reflected in the phenomenon of distancing. For example, in social hierarchy where the norms in a higher class group are mimicked by a lower class group with a view to the lower class group projecting themselves as higher class, the higher class group seeks to re-create distance (Grint, 1997). To put distance back in place, the higher class group adopts a new social fashion to replace their previous norm. The choice to implement new norms and fashions in order to achieve distance is not driven by rationality, but by an emotional response to change (Grint, 1997).

The fourth perspective in Abrahamson's (1991) typology of the adoption of innovation is the *fad* perspective. This is similar to the fashion perspective in that it precipitates in uncertain conditions, but differs in that the organisations imitated are not of a different kind, but from within the same group, and in particular, those organisations with a high reputation (Abrahamson, 1991). Both this and the fashion phenomena are similar to the idea in Institutional Theory that mimetic forces are in operation where there is insecurity and ambiguity (DiMaggio and Powell, 1991). In times of uncertainty, decision makers are impelled to imitate leaders in their group.

### **1.4.3 Further Irrationality**

Not all drivers for change may be rational, but Abrahamson (1996) suggests that what matters is the appearance of progress and rationality. With regards to managers, underlying values and emotions are governed by: wanting to be in control; winning (and not losing); suppressing negative feelings; and being seen to act as rationally as possible. Therefore, there may not be congruity in what managers and organisations openly profess they want to achieve and what they actually want to achieve (Argyris, 2000).

Fashions and Fads could also be irrational in adoption, for example by giving competitive advantage to organisations and institutions, even if they are

*'symbolically efficient'* in promoting a progressive or ethical image (Abrahamson, 1991: 608). Even when symbolic efficiency is not present, theorists should not assume that the adoption of a new idea will harm an organisation. If contrary fashions are adopted sequentially, each application could provide incidental benefits (Abrahamson, 1991).

In the adoption of innovation, managers take selective inspiration from others, with some ideas coming from those who set fashion in management. The management theory industry primarily comprises *'consultancies, business schools and gurus'* (Micklethwait and Wooldridge, 1997: 54). Business mass media (Abrahamson, 1996) and well known company executives (Crainer and Dearlove, 2003) can also be fashion setters. Fashion setters tend to be in competition to be influential, with the leaders being individuals or groups that are fastest to identify the needs of managers and provide them with new techniques: those who can effectively and eloquently tailor and describe these techniques; and those who can reflect this information back to the management community (Abrahamson, 1996). The danger for those who are slower to do this is that they may be viewed negatively as lagging behind.

The objectives and values of each community of fashion setters may not be the same. For example, academic researchers and managers might act based on different assumptions and motives (Blackler and Shimmin, 1984). The values of researchers are underpinned by seeking understanding, whilst managers' values are governed by accomplishment. Academic researchers tend to take a longer term perspective, are more objective, and seek validity: whilst managers are more likely to be concerned with effectiveness (Blackler and Shimmin, 1984).

However, academics may have other motivations than simply seeking to obtain distance and objectivity from the phenomenon under investigation. They write mainly for their audience of peers rather than for managers (Grint, 1997). Whilst some academics' careers may have flourished on the book and conference circuit, many achieve career development through treating their peer group as their

primary audience, with academic journals as the principal route for publication. Since career success is tied to scholarly peer approval, it has not been in academics' interest to spend time and effort writing for a practitioner community. These issues will be explored in more detail in the context of the OD profession, and a comparison of the pertinent points from the theory explored in this chapter (with the findings from this study) will be made in the discussion chapter (Chapter 7).

## Conclusion

Critical Realism, as it has been applied in the study of organizations, is an appropriate philosophical approach for this work, due to its commitment to an ontology which asserts a social reality independent of our knowledge of it. In addition, Critical Realism has a strong commitment to examining the development of ideas over time, and of those who hold these ideas. This provides useful guidance for the selection research methods, as will be seen in Chapter 4. As argued by Mutch et al. (2006), Critical Realism articulates well with Institutional Theory (with its inclusion of issues such as structure and agency). This in turn provides a rich source of concepts (including isomorphism) to understand the formation and impact of professions as a key feature of modern life. The theoretical perspectives outlined in this chapter will be helpful in exploring the nature and development of OD as a profession, and also to provide insight into the factors which influenced the adoption of ideas: thereby helping to further understanding on the extent to which OD might be conceptualised as a Fad or Fashion. These broader ideas are the context to the discussion of the literature on OD, which is reviewed in the next chapter.

### **Chapter 3. Academic Perspectives: an OD Literature Review**

Having set out the theoretical position for this work in Chapter 2, this chapter provides an overview of the literature on the development of OD. Chapter 2 explored concepts on the formation of professions, including an analysis of what is known about how and why professions develop as institutions, and the forces that influence development. This chapter discusses the historical development of OD from its origins, necessarily providing a multi-attribute definition. A number of key attributes presented in the literature are outlined, followed by a discussion of the context of OD and ways in which key challenges to the profession have been presented.

In relation to the core attributes of OD, a review of traditional OD will be followed by consideration of OD practice, and of the skills required to be a competent OD professional. A particular skill identified for OD practitioners is the ability to challenge organisational orthodoxy. Change Management is an ongoing attribute of the OD profession, so will be addressed, as will the attribute of Consultancy Orientation. Other core attributes of OD considered are Behavioural and Cultural concerns, supporting efforts to achieve Organisational Effectiveness, and taking a Strategic Approach.

With regards to the context and challenges faced by the OD profession, one key issue is the relationship of OD to HR and HRD. The role of professional associations, which is a key factor in the institutional status of the OD profession, will be examined, as will the issue of values and ethics for the profession. Critiques of OD will be explored and the chapter will conclude with review of the perceived value of the profession, a discussion on contemporary OD, and the prognosis for its future.

This chapter does not provide an account of the systematic process used to identify the sources. Since a bibliometric search was one of the methods applied to source data used in this study, the systematic process applied to search for and identify relevant work will be described in the methodology and findings chapters. This

bibliometric search will also demonstrate that writing on OD was dominated by work from the USA, followed by the UK. A special issue of the *Journal of Applied Behavioural Science* specifically invited articles to review the state of practice in international OD, with the conclusion being that the international deployment of OD practice was still '*very much at the beginning of these phenomena*' (Neumann et al. 2009: 184). As such, the United States (US) / Anglo-centric accounts provided in this review are a reflection of the geographical spread of publication, rather than of author bias in literature searching.

Also noteworthy was that, in comparison to other academic subject areas in business and management, the number of OD scholars was found to be comparatively small. For example, a 2014 journal article by Cummings and Cummings dedicated to the divergent perspectives on OD contained only 28 lead author sources, the work of many of whom were also referred to in this chapter. It was not intentional to draw continuously from the same authors, or from somewhat dated sources, but this serves as a reflection of OD as an area of research with neither a large number, nor a diverse range, of published scholars. In terms of the nature of what was published, some OD topics had more coverage and few reports on empirical research data had been gathered and analysed. Not all, but much of, the writing was descriptive and prescriptive rather than critical in nature. In summary, reviews of OD '*are now out of date, the textbooks tend to be sketchy, and the OD readers, by their nature, do not present a coherent picture*' (Burnes and Cooke, 2012: 1396). All of the factors noted above have influenced the review contained in this chapter.

## The Origins of the Term and Definitions of OD

In considering the history and trajectory of OD, it is first useful to understand the origins of the term itself. The term OD was coined simultaneously in two or three places, '*through the works of Robert Blake, Herbert Shepard, Jane Mouton, Douglas McGregor, and Richard Beckhard*' (French and Bell, 1999: 41). The name itself came

from the T group movement, run by two groups of National Training Laboratory (NTL) consultants: Richard Beckhard and Douglas McGregor working on a project at General Mills, and Robert Blake and Herbert Shepard working at Esso (Burnes and Cooke, 2012).

In 1959 Douglas McGregor and Richard Beckhard carried out a company-wide culture change project at General Mills in Dewey Balch using a '*bottom up*' approach. Thinking that the term '*bottom up management*' would not be accepted in academic circles, they decided to use the term '*Organization Development*' (Cheung-Judge and Holbeche, 2011: 16). In the same year Herbert Shepard and Robert Blake were carrying out a culture change programme at the Esso Refinery in Bayway, New Jersey, entitled the *Managerial Grid* educational programme. The objective of the programme was to improve organisational health through culture change throughout the total system, and they decided to use the term '*Organizational Development*' for their work (Cheung-Judge and Holbeche, 2011: 17). Both of these programmes shared characteristics which have continued to be the five core characteristics of OD: (1) '*system wide*;' (2) '*planned change efforts*;' (3) '*focused on the total system and not just one aspect of it*;' (4) '*targeted at the human side of the enterprise*;' and (5) '*aimed at improving organisation effectiveness*' (Cheung-Judge and Holbeche, 2011: 17).

### **2.1.1 Definition and the Broad Range of OD**

In order to understand OD, it is important to first understand its founding essence. OD '*is an approach to change developed in the USA. It is based on the work of Kurt Lewin and, originally at least, was concerned with improving the effectiveness of the human side of the organisation through participative change programmes*' (Burnes, 2004a: 601).

The CIPD (2014a: n/p) notes that OD is concerned with ensuring an organisation has a committed:

*'... fit for the future workforce needed to deliver its strategic ambition. It plays a vital part in ensuring that the organisation culture, values and environment support and enhance organisation performance and adaptability. Provides insight and leadership on development and execution of any capability, cultural and change activities'*

(CIPD, 2014a: n/p).

However, there are multiple definitions of OD. In the words of Pettigrew (1985: 3): *'(OD) has almost as many definitions as it has practitioners'*, and the copious number of definitions of OD tells a story in itself. However, despite their number, these definitions do little to clarify the understanding of OD and if anything add to the confusion and difficulties of providing a clear definition. A recurring theme amongst scholars is the lack of consensus on the basic goals of OD (Schein, 2006). There is little agreement about what OD is or what it does (Bradford and Burke, 2004), and several authors provide multiple definitions and characteristics (e.g. Cheung-Judge and Holbeche, 2011; Cummings and Worley, 2015; French and Bell, 1999; Senior and Swales, 2010). Though OD has *'maintained a conceptual core'* - a focus on change and processes with an explicit and implicit goal to improve organisation effectiveness - there is less agreement in the literature on *'which values should inform the concept of "organizational health"'* (Schein, 2006: xvii).

Over the four decade period between 1970 and 2010 applied to the data collection for the content analysis, the nature of the field of OD has changed. As would therefore be expected, the characteristics of definitions have also changed. Nevertheless, to give some context to the field an early definition which is still quoted (see Cummings and Worley, 2015) is that: *'Organization development is an effort (1) planned, (2) organization-wide, and (3) managed from the top, to (4) increase organization effectiveness and health through (5) planned interventions in the organization's "processes" using behavioral-science knowledge'* (Beckhard 1969: 9). This definition includes many of the features covered by Cheung-Judge and Holbeche (2011) in the five core characteristics noted above with planned,



organisation /system wide approach and a focus on effectiveness included in both. Whilst Beckhard (1969) refers to the application of behavioural science, Cheung-Judge and Holbeche (2011: 17) use a broader rhetoric of '*the human side of the enterprise*'. Beckhard's (1969) inclusion of top down management and the use of a process approach are both absent from Cheung-Judge and Holbeche's (2011) characteristics. However, given the time gap between the definitions, they are broadly similar.

A categorisation of the main themes of OD definitions are outlined in Table 3.1 below (adapted from Stanford, 2012: 47). This table encompasses features of Beckhard's (1969) definition and Cheung-Judge and Holbeche's (2011) core characteristics.

Themes of the definitions	Key authors
Mention of ' <i>change</i> '	Bennis, NTL, Margulies and Raia, Friedlander and Brown
Includes reference to improving ' <i>organisational effectiveness</i> ' or other organisational aspect	Beckhard, Margulies and Raia, French and Bell, Cummings and Worley
Suggests a consciously planned approach to change or improvement	Bennis, Beckhard, NTL, Friedlander and Brown, French and Bell, Cummings and Worley
Indicates that OD is applied to an organisation's ' <i>processes</i> '	Beckhard, NTL, Friedlander and Brown, French and Bell, Cummings and Worley.
Focus on the ' <i>human side</i> ' of the enterprise and/or mentions of behavioural science	Bennis, Beckhard, NTL, Friedlander and Brown, French and Bell (1984 and 1990), Neilson, Schein, Cummings and Worley
Views the organisation as a system	Schein, Cummings and Worley

Table 3.1 Themes of Definitions of OD and Key Authors (adapted from Stanford, 2012: 47)

However, since many of the definitions referred to above are dated, the development of the themes contained within them is shown in Table 3.2 below.

<b><i>'Element inherent in definitions' (from table above)</i></b>	<b><i>'Moving to'</i></b>
<i>'... relatively stable contexts'</i>	Instability and continuous change
<i>'Improving effectiveness'</i>	Measured and evaluated effectiveness emanating from the creation of <i>'continuous adaptability' effectiveness</i> label is beginning to be replaced by <i>health</i>
<i>'New state' arrived at through planned change</i>	<i>'Flexible approach to various types of change'</i> (planned and / or unplanned radical change, planned and / or unplanned incremental change)
<i>'Human process'</i>	<i>'Human and business process, structures, technologies'</i>
<i>'Behavioural social/science'</i>	Ethnography, anthropology, neuro-economics, positive psychology
<i>'Systems theory'</i>	Complexity theory, chaos theory, quantum theory

Table 3.2 Inherent elements in the original definitions of OD and how these are changing (adapted from Stanford, 2012: 50)

Whilst providing a useful typology of themes within OD, the variation between definitions is noteworthy. The boundaries of early definitions of OD were much clearer and the world was more predictable, so defining OD was a simpler task (Garrow, 2009). However, in a world that has become increasingly unpredictable and uncertain, having a standardised OD definition is more difficult (Garrow, 2009). There is increased blurring of the boundaries of the field of OD, alongside significant development in new techniques and approaches. As a result, it has become more difficult to define and describe the concept (Greiner and Cummings, 2004).

OD was not well understood by those from outside the field, for a number of reasons. It was perceived as being eclectic, had a number of conflicting definitions, and did not have a place either in the academic or the corporate world (Marshak, 2006). The diverse nature of OD may be a weakness and a strength *'... but leaves many thoroughly bemused'* (Marshak, 2006: 835). Stanford (2012: 50) questions if it was a problem that OD had *'no standard definition'*? Where the lack of standard definition was a problem was in the assessment of OD's contribution. Evaluation

was difficult as the field of OD had blurred boundaries and consequently, this led to difficulty in the maintenance of credibility and reputation (Marshak, 2006).

As organisations changed and the challenges they faced changed, then so should have OD. As an action science, it therefore moved with the times and new applications and methods were developed (Stanford, 2012). The lack of a coherent definition was not necessarily negative, as it reflected that OD utilised knowledge from a range of subject areas. However, a consequence of this was that it reduced the possibility for the development of '*a unifying theory*' (Stanford, 2012: 50). This suggests the need for a multi-attribute definition and, in turn, the need to consider the boundaries between OD and other areas.

### **2.1.2 Blurred Boundaries and Confusion with other Particularly Close Subject Areas**

Although the blurred boundaries of the field of OD in both literature and practice have been acknowledged, fuzziness endures even in areas where there is potential for more clarity. The terms of organisation and organizational development have often been used as though they were the same (see Francis, 2012). Rothwell et al. (1995:12) are amongst the few who have differentiated, noting that '*organizational development refers to any effort to improve an organization. Unlike* OD '*... it does not imply assumptions about people, organizations, or the change process*'.

Crossover exists between OD and other fields such as Quality of Working Life, Human Resource Management, Human Resource Development, Total Quality Management, Organisation Transformation, Organisational Effectiveness and Management Development (Church and Burke, 1995). There is a little more clarity on the difference between Organisation Design and OD (for these purposes referred to as Organisation Development, in order to differentiate it from Organisation Design), and the CIPD professional map differentiates between these (CIPD, 2014a). Though separate fields, Organisation Development and Organisation Design complement each other as core capabilities required in the design and delivery of strategic change (Cheung-Judge and Holbeche 2011: 214).

Organisation alignment is the goal of Organisation Design (Cheung-Judge and Holbeche, 2011), and includes explicit and visible *'focussing on aligning the non-people (hard) parts of the organisation'* (Stanford, 2012: 55). Organisation Design differs from Organisation Development on the issues of people, process, technology and physical infrastructure (Stanford, 2012). However, although Organisation Design is the driver for structural change, this in turn impacts on the need to address cultural change (Cheung-Judge and Holbeche, 2011). In contrast to Organisation Design, the objective of Organisation Development is sustained organisational effectiveness (Cheung-Judge and Holbeche, 2011) and relates *'... to elements of the organisation that are implicit and cannot be so easily codified or explained: culture, behaviours, relationships, interactions, the way a written process operates in practice ...'* Stanford (2012: 55). Organisation Development and Organisation Design are required to work together integrally as it is essential that changes in structure and interpersonal systems legitimise and reinforce each other (Beer and Huse, 1972).

Further clarification of the boundaries of OD is provided by Burke (1971). In reflecting on the work of Warren Bennis, he describes the similarities and differences between OD and Operational Science. He explains that they have much in common, as both started about the same time: both are post war phenomena; both rely on the application of empirical science; both emphasise improvement and optimisation; and both are applied, problem centred and normative in approach. They both also; use a systems approach; take interdependencies in the internal system into account; are best applied in a fast changing complex and science based system; and are dependent on relationships with clients underpinned by communication and trust. For all their similarities the most crucial difference identified is in the identification of strategic variables for intervention (Burke, 1971). Where Operations Science concentrates on routing, inventory and allocation, OD concentrates on mission and values, conflict, human relationships, leadership, resistance of change, human resource usage, communications staff and Management Development (Burke, 1971).

An area where there is also confusion is in the relationship of OD to HRD.

Organisation wide training programmes, including large scale programmes of managers attending human relations training laboratories, have often been referred to as OD efforts (Burke, 1971). However, the difference *'between these and a genuine OD effort ... is that they are not specifically related to the organization's mission; they are not action-oriented in the sense of providing a connecting link between the training activity and the action planning which follows it'* (Burke, 1971: 21).

OD is more often confused with Management Development than with other practices or concepts (Burke, 1971). OD and Management Development are often treated as though they are a single entity (e.g. Patching, 1999). However, a primary differentiating character is the customer. In Management Development, the client stakeholders are the managers and the interventions are restricted to their development rather than focusing on the development of the wider organisation (Beckhard, 1969). However, OD and Management Development can be compared on a variety of other categories: *'Reasons for Use ... Typical Goals ... Interventions for Producing Change ... Time frame ... Staff Requirements ... Values'* all of which had different features (Burke, 1971: 572 - 573). Nevertheless, although the strategies are different, they can be compatible and Management Development is identified as one of the techniques which can be used as an intervention in an OD process (Burke, 1978).

## History

Having reviewed the issues around defining OD, its history must be examined in order to consider how it has developed. Since the content analysis data on the development of the profession of OD in the UK covered a forty year period between 1970 and 2010, it is vital to understand what has been written about the roots of the profession and how it has changed over time. There remains confusion in terms of the timing of the origin of OD (Burnes and Cooke, 2013) and *'the cohering and naming of somewhat disparate social-psychological ... concepts and practices as the managerial field of ... (OD)'* is normally acknowledged as emanating from the US in the 1950s (Burnes and Cooke, 2013: 768). The origins of OD have been linked to the post World War II era, as part of the ethos of the need to rebuild, reorganise and manage in a new world (Stanford, 2012). It was considered as being a post war answer, acting as a countervailing influence to the dehumanising practices of scientific management (Garrow, 2009).

### 2.2.1 Academics Identified as Important Contributors in the Founding Field of OD

Given that an objective of this research is to understand the dissemination of management ideas, it is important to know who was identified as having had an influence on the development of others understanding of OD. Many scholars writing on OD acknowledged key figures in the early development of OD, especially those who influenced its early development. The key figures acknowledged by three authors of being of importance to OD are detailed in Table 3.3.

Many of the key individuals listed in Table 3.3 are featured in at least two of the lists, with Lewin, Lippitt, McGregor, Argyris, Beckhard, Shepard and Blake having appeared in all three. Lewin died on the 11 February 1947 (Burnes, 2004b) and as such, his direct work ended early in the history of OD. By that time he had founded *Field Theory*, developed thinking on *Group Dynamics*, coined the phrase *Action Research* and developed a *3-Step Model* for change (Burnes, 2004b).

<b>Cheung-Judge and Holbeche (2011)</b>	<b>Stanford (2012)</b>	<b>French and Bell (1999)</b>
Lewin Lippitt Schein McGregor Likert Argyris Tannenbaum and Shedline Beckhard Shepard Blake	Beckhard Bennis Blake Mouton Lawrence Lorsch McGregor Schein Argyris Shepard Burke Greiner Kolb Lewin Lippitt White Emery Revans Trist Jaques	Lewin Radke Festinger Lippitt Cartwright Benne Bradford Tannenbaum Argyris McGregor Shepard Mouton Beckhard Bennis Schindler-Rainman Likert Mann Bion Rickman Trist Emery Blake

Table 3.3 Important Contributors in the Founding Field of OD

Although Stanford (2012: 43) describes Kurt Lewin as a *'significant other'*, this is in marked contrast to the primary founder position normally attributed to him: such as being the first name listed by French and Bell (1999). He is considered to be the *'critical founder of OD ... Schein commented that there is little question that Lewin is the intellectual father of contemporary theories of applied behavioural science, action research and planned change'* (Cheung-Judge and Holbeche, 2011: 14).

Lippitt was also influential at the outset of OD and was in the first group to train in T group methodology in 1946 (Cheung-Judge and Holbeche, 2011), and along with Benne, he is attributed as the inventor of the T Group (French and Bell, 1999). The association of early OD with T groups is significant as there was a distinct link between those involved in the NTL and those who became leading names in the OD movement (Burnes and Cooke, 2012). Those involved in early T groups and the NTL also '*shared its zealot-like commitment to the promotion of T-Groups*' which in turn produced an environment suitable for a '*rapid expansion of OD in the 1960s*' (Burnes and Cooke, 2012: 1399). Lippitt was also a member of the original staff at MIT's '*Research Center for Group Dynamics at MIT*' as well as being one of founders of NTL (Cheung-Judge and Holbeche, 2011: 14).

Likert is known for the founding of organisation survey methodology (Cheung-Judge and Holbeche, 2011). Along with Mann, he developed the survey research and feedback stem, which linked with the Lab and Survey Feedback stems (French and Bell, 1999). Other contributors to developments in the laboratory stem were Tannenbaum, Argyris, McGregor, Shepard, Blake, Mouton, Beckhard, Bennis and Schindler-Rainman (French and Bell, 1999). Argyris authored several books on OD, some of which are considered as classics in the field (Cheung-Judge and Holbeche, 2011). Tannenbaum worked with Shedline to launch the first non-degree training programme on OD, with Beckhard creating an early '*non-degree training*' OD programme at the NTL (Cheung-Judge and Holbeche, 2011: 16). Shepard is credited with establishing the '*the first doctoral programme*' in OD '*... at the Case Institute of Technology*' in 1960 (Cheung-Judge and Holbeche, 2011: 16). He was influenced by work at the Tavistock Institute, particularly in their approach to family group therapy, where he spent 16 months (Cheung-Judge and Holbeche, 2011). At a later stage he was '*significant in shaping the changes in T group*', spending 6 years on the NTL staff at Bethel (Cheung-Judge and Holbeche, 2011: 16).

By far, the majority of those identified above are US-based scholars, and the field of OD has been dominated by US based academics. With respect to the UK influence in early OD, key contributors to developments in the *Sociotechnical / Socioclinical*



stem and to *Visioning* and *Future Search*, were Bion, Rickman, Trist and Emery (French and Bell, 1999). Other UK based contributors include Revans and Jaques (Stanford, 2012). In the founding era of OD, there were links between US and UK centred scholars such as Trist, Bion, Lewin, Likert and Argyris, characterised by the joint launch of the *Human Relations Journal* by Tavistock and MIT Research Centre for Group Dynamics (French and Bell, 1999). Bennis and Blake also crossed the US / UK divide by studying at The Tavistock Institute as did Argyris, who '*held several seminars with Tavistock leaders in 1954*' (French and Bell, 1999: 45).

Not all US-based scholars acknowledge the UK based contribution to the development of early OD. In their 10<sup>th</sup> edition, Cummings and Worley make no reference to *Sociotechnical Systems*, The Tavistock Institute, or to the work of Trist or Emery (Cummings and Worley, 2015). However, in reviewing the UK contribution to OD, Burnes and Cooke (2013) examine the formal establishment of The Tavistock Institute. In a 1945 document which constituted an application for a funding application to The Rockefeller Foundation to found the Institute, mention was included of '*OD's specific cluster of social-psychological ideas to business and management*' (Burnes and Cooke, 2013: 769).

Lewin met Trist, a founder of The Tavistock Institute, in London in 1933 and they met again in 1936 in the US when Trist visited Yale (Burnes and Cooke, 2013). Scholarly accounts of these meetings were that Lewin impressed and influenced Trist, implying a one sided relationship (Burnes and Cooke, 2013). However, in Trist and Murray's history of The Tavistock, Lewin is only mentioned with respect to his field theory and his visit to Yale, and it is a '*Professor Sapir at Yale whom Trist names as having had a significant impact on him*' (Burnes and Cooke, 2013: 775). Trist and Emery were also pioneers in their own right in the founding of the *search conference* real time participative approach to planning in rapidly changing environments (Anderson, 2000). Their approach has been identified as the founding of dialogic OD (Bartunek and Woodman, 2015). However, in more recent accounts, Lewin and his '*immediate US followers*' are still situated '*at the centre of OD history*' (Burnes and Cooke, 2013: 775). Ultimately, The Tavistock Institute's role in founding

the field of OD had not been recognised or sufficiently acknowledged (Burnes and Cooke, 2013). The account of the founding of OD as having been entirely US and Lewin centric should be challenged (Burnes and Cooke, 2013).

Another UK based academic who was influential in the development of OD was Pettigrew, with a 1985 text reporting on an in depth eight year study of ICI. With such a ground breaking study it would be reasonable to expect Pettigrew (1985) to have appeared in the lists of influential scholars in OD. However, here again is a UK based scholar who had shaped understanding of OD, but has not been fully recognised by academics reporting on the development of OD. Pettigrew's seminal study on ICI was referenced widely (see Beer and Walton, 1987; Burnes, 2004b; Burnes and Cooke, 2012 and Grieves, 2000), and French and Bell cite other work by Pettigrew (1979) as being amongst the '*Important contributions to OD literature*' (French and Bell: 1999: 300).

Although judged as an important work by some, Pettigrew (1985) does not feature in other works where it might be expected to appear. So, for example when making reference to OD's history and development (see Bazigos and Burke, 1997; Cheung-Judge and Holbeche, 2015; Church et al., 1992; Cummings and Worley, 2015; Garrow, 2009; Shull et al., 2013; Stanford, 2012), authors have referred to USA based scholars, but missed reference to this formative UK study.

The majority of the names in Table 3.3 above are of those who were influential in the early development of OD. Since the field of OD was not clearly defined up to the 1960s, Schein and Beckhard (1998: v) commissioned an Addison-Wesley series and invited a number of scholars in the field to contribute. The six books were authored by '*Beckhard, Bennis, Blake and Mouton, Lawrence and Lorsch, Schein and Walton*' (Schein and Beckhard, 1998: v), suggesting that they were considered to be eminent in the field of OD at that time. Also influential in the development of the field of OD were Schein, who promoted that process consultation was not just a tool but a key philosophy which underpinned OD (Cheung-Judge and Holbeche, 2011: 15); and Burke, for establishing the US based OD Network (Stanford, 2012).

Although the founding of OD included the underlying intention to improve the working life of the many, it also had an elitist tendency (Golembiewski, 1989). This came from an '*intellectual elitism*' derived from its research orientation (Golembiewski, 1989: 43). It could be argued that this intellectual elitism is still a feature of contemporary OD.

### **2.2.2 The Development of OD as a Profession since its Founding**

Having examined the leading names in the founding field of OD, this section will examine its development as a profession. The date of origin of the field of OD is contested, but 1947 is a year commonly given for its foundation (e.g. Cheung-Judge and Holbeche, 2011). Stanford (2012) dates its inception a year earlier, in 1946, claiming that OD has a shorter history than HR with its roots in '*behavioural science ... psychological concepts ...*' and '*... social and humanist values relates to openness, trust and harmony*' (Stanford, 2012: 43). However, a case was made for OD originating in 1939, with both the publication of Lewin's autocracy-democracy studies and his participative / action research studies with the Harwood Manufacturing Company (Burnes and Cooke 2012). In terms of development, the rapid growth in OD was as a result of the '*promotion of T-Groups*', but by the end of the 1960s it was under attack (Burnes and Cooke, 2012: 1399).

Scholars have often described the development of the profession as being chronological and an order of succeeding forms. Four accounts of this chronological development are presented in Table 3.4.

Table 3.4 outlines the perspectives of Burke (2004), Cheung-Judge and Holbeche (2011) and Garrow (2009) in relation to the earlier origins of OD, whereas Palmer (2006) and French and Bell (1999) extend their descriptions into later decades. Burke (2004) mentions earlier influences prior to OD, and describes sensitivity training and socio-technical systems as setting the stage for the inception of OD. Broadly speaking, Burke (2006), Cheung-Judge and Holbeche (2011) Palmer et al. (2006) and French and Bell (1999) all describe similar origins and developments,

whilst Garrow's (2009) description corresponds less well as a comparison: using the categorisation of *roots* she does not follow a chronological order.

Burke (2004)	Cheung-Judge and Holbeche (2011: 13)	Garrow (2009: 3 - 4)	Palmer et al. (2006)	French and Bell (1999)
<p>Scientific management</p> <p>The Hawthorne studies</p> <p>Industrial psychology</p> <p>Survey Feedback</p> <p>Sensitivity Training</p> <p>Socio-technical systems</p> <p>Organization development (OD)</p> <p>The managerial grid and OD</p> <p>Coercion and confrontation</p> <p>Management Consulting</p>	<p>NTL '<i>on group dynamics and leadership</i>' ... 'founded in 1947'</p> <p><i>'The birth of the T group and other forms of laboratory education'</i> ... 'Pioneered in the USA by Lewin ... and in the UK by the Tavistock Group' ... 'Carl Rogers labelled the T group the most significant social invention of the century (1968)'</p> <p><i>'The larger human relations movement in the 1950s'</i></p> <p><i>'The socio-technical system (STS) thinking from the British Tavistock Institute'</i> commencing with studies conducted in British coal mining in 1947</p> <p><i>'The development of survey research methods'</i> e.g. survey of the Detroit Edison Company</p>	<p>Root 1: The Human Relations Movement</p> <p>Root 2: Training and development</p> <p>Root 3: Employee feedback</p> <p>Root 4: Action research and change</p> <p>Root 5: Systems thinking</p>	<p>40s 50s NTL and T Groups, Action Research and Survey Feedback</p> <p>50s 60s Participative Management, Productivity and Quality of Working Life (QWL)</p> <p>70s 80s Strategic Change</p>	<p>Laboratory Training Stem</p> <p>Survey Research and Feedback Stem</p> <p>Action Research Stem</p> <p>Socio-Technical and Socio-Clinical Stem</p> <p>Second generation (1999)</p> <p>Organisational Transformation</p> <p>Organisational Culture</p> <p>Learning Organisation</p> <p>Intensified interest in teams</p> <p>Total Quality Management (TQM)</p> <p>Visioning and Future Search</p> <p>Large meetings and getting whole system participants in the room</p>

Table 3.4 The Development of the OD Profession as an Order of Succeeding Forms

### 2.2.3 The Development of OD as Portrayed in the Academic Literature

Having explored its founding and broad development, this section will examine how the literature on OD unfolds. The earliest book / journal that included the label *Organisation Development* was Richard Beckhard's 1969 text (Stanford, 2012). Also in 1969, Schein et al. (1969: iii) introduced a series of 6 books as '*... we felt there was a growing theory and practice of something called "organisation development," but most students, colleagues, and managers knew relatively little about it.*'

In the 1970s, OD was still in the process of '*growing up*' (Burke, 1976: 23). At this point it had moved from being involved only in industrial applications to having a wider scope of organisational applicability, and had also adopted more of a contingency approach (Burke, 1976). Democracy was no longer the primary value, but authenticity was. The focus had changed from the OD consultant being the change agent, to line managers taking that role. At this point Burke (1976) was calling for a more unifying theory and research base.

The emphasis in the 1970s, and into the 1980s, was on profit rather than on people (Burnes and Cooke, 2012). There was a move from a behavioural and small group orientation to whole system approaches in which strategy, structure and organisational effectiveness became more important, and the perspectives of a range of organisational stakeholders were considered (Burnes and Cooke, 2012).

Characteristics of this change were:

- practitioners viewing organisations as whole systems and contextually '*building on socio-technical and contingency theories*'
- emphasis on organisational culture over group values and norms
- a similar shift in the focus on learning from group to organisational learning and organisational transformation prevailing over group change

(Burnes and Cooke, 2012: 1405)

In the 1980s techniques such as Business Process Engineering (BPR), Six Sigma and Total Quality Management (TQM) came to the fore (Burnes and Cooke, 2012).

Whilst OD specialists had been successful in having their group level work accepted, their whole systems transformation approaches were less clear. A quandary for OD practitioners was that whilst organisations sought interventions which contributed to organisational economic performance, they were less collaborative or group based (Burnes and Cooke, 2012). Not all stakeholders had equality of voice, which was against OD's central tenet of democratic and humanist values (Burnes and Cooke, 2012).

An era of rapid top down approaches to change became more common and often the methods involved unpleasant consequences for people, such as business closures and redundancies. The spirit of participation in change for positive impact for all seemed out-of-date (Burnes and Cooke, 2012). This resulted in OD's failure to address power relationships, and this became a focus of academic critique (Burnes and Cooke, 2012).

The range of views on OD from the *'early 1980s and 1990s'* varies: from being considered as critical to business success, through to being *'a flash in the pan'* (Sharkey, 2009: 12). However, in this climate, OD became practitioner driven, although its academic wing still continued to contribute new ideas and models, especially in terms of large-scale transformational change (Burnes and Cooke, 2012). Once the field became dominated by practice, OD's credibility, effectiveness and rigour was on a less stable footing. Nevertheless it expanded into Japan, Latin America and Europe from its origins in the US and UK (Burnes and Cooke, 2012). The notion of strategic OD also developed in the 1980s (Anderson, 2009).

The 1990s and 2000s saw *'the renaissance'* of OD (Burnes and Cooke, 2012: 1409). This was as a result of three separate developments: 1) the OD community engaged in soul searching; 2) a new generation of scholars began to give critical yet supportive attention to Kurt Lewin's work and 3) there was increasing use of OD practice in HR and HRD (Burnes and Cooke, 2012). Additionally, OD and its

membership bodies became more internationally dispersed (Burnes and Cooke, 2012).

More recently, there has been a shift in emphasis with OD paying more attention to the external environment in which it operates, with a focus on achievement of alignment and strategic organisational objectives (Austin and Bartunek, 2006). Areas of interest for development have included diversity awareness, socio-technical systems design, self-managed teams, congruent reward systems (e.g. gain-sharing), community, and spirituality (French and Bell, 1999). There has also been a widespread interest in BPR. However, the extent to which BPR is congruent with OD values has been questioned (French and Bell, 1999).

A key question is how the development of OD compares with the development of HR and HRD, particularly in the USA? The histories of OD, Human Resource Management (HRM) and HRD in the USA came from distinctly separate professional roots, and each has evolved in different timeframes (Ruona and Gibson, 2004). According to Ruona and Gibson (2004), HRM originated in the mid-1980s, HRD originated in the late 1970s, and OD was considered as the oldest of the disciplines with its inception in the mid to late 1970s. However, this date is much later than most other scholars determine, and may be based on the founding of the OD Network in the early 1970s. In giving the date as mid to late 1970s Ruona and Gibson (2004) have failed to acknowledge many fellow scholars who place OD's origins from the late 1940s. The development of the profession in the UK did not follow either the same chronological or developmental path, as will be demonstrated in the findings of this study.

There is also a view of OD as having a short history, which started in the 1950s and moved forward into the 60s with the *'hippy counter culture, after which it lost its relevance and coherence and fizzled out in the 1980s'* (Burnes and Cooke, 2012: 1396). Aligned to this short historical perspective was a labelling of *classical OD* and *new OD* (Marshak and Grant, 2009): a classification readily adopted by others such as Bartunek and Woodman (2015), Bryant and Cox (2013), Francis et al. (2012).



However, arguably, OD has had a longer presence, with its origins in 1939 and remains the leading and most applicable approach to achieving organisational change (Burnes and Cooke, 2012).

OD has moved considerably from its roots in planned and group based change, and much of early and later OD practice has become mainstream, such as action research and T groups, self-managed teams and job design change (Burnes, 2004a). Although crucial to its relevance, the organisation wide transformational approaches of OD have not been as well refined, focused and established as its expertise in group / team level work. Ironically, the more OD has focused on organisation wide issues, the more loosely connected it has become to what is happening with teams and individuals (Burnes, 2004a).

In reporting on documented history and historical developments, as has been done in this section with regards to the development of OD, it is important to always retain a caveat. That is that the documentation is of itself reflective of two eras, the era that is being written about and the era and context in which it was written. For example, norms of the social era at the time of writing could also lead to assumptions pervading the reporting of historical facts. In reviewing two different editions of a French and Bell text, Cooke (1999) demonstrated that in listing key scholars of influence in the development of OD, in the 1984 text no females were mentioned, yet in the 1996 edition, female scholars' names were included!

## Core Attributes of OD

### 2.3.1 Traditional OD: Open Systems, Process and More Recent Additions

During the founding period of OD, Lewin wrote about field theory, group dynamics, action research and the 3-step model of planned change (Burnes, 2004b). All of these elements were integrated into the field of OD practice.

The core of traditional OD was often associated with open systems and process approaches, and the application of tools. There are four broad OD approaches: process consulting; application of systems models; Appreciative Inquiry (AI) and a CIPD toolkit based on a '*... seven-step change management approach*' Stanford (2012: 54). Schein developed the OD focus on process (Schein, 1969 followed by Schein, 1987; Schein, 1988; Schein, 1999) and continued to emphasise process over content (2006: xix), noting that '*Process at the individual, group, or intergroup levels is what OD practitioners understand and can improve*' (2006: xix). Continuing to improve human processes within organisations legitimised OD as being essential to the general field of people in organisations (Beckhard, 1969).

There are several similar descriptions of the OD process. For example, stages in the process model have been defined as being '*diagnosis, strategy planning, education, consulting and training, evaluation*' (Beckhard, 1969: 105). Cheung-Judge and Holbeche's (2015) outline processes as consisting of: the overview, entering and contracting phase; followed by diagnosis, intervention and evaluation. Models in Rothwell et al. (1995) also follow related process stages: entry, start up, assessment and feedback, action planning, interventions in large systems, interventions in small groups, person focussed interventions, evaluation, adoption, separation. As a general model of planned change Cummings and Worley (2015: 28) outline parallel steps, with feedback loops for all steps, as demonstrated in Figure 3.1.



Figure 3.1 The General Model of Planned Change. Adapted from Cummings and Worley (2015: 28)

Senior and Swailes (2010) propose a refined process model for a change programme. Step 1a consists of diagnosing the current situation, with the data collection methods being the social science type methods also recommended by Cummings and Worley (2015). Step 1b involves developing a vision for change. Step 2 focuses on gaining commitment to the vision and need for change. Step 3 involves developing an action plan, in which the role of the change agent is clearly outlined and responsibilities identified, allocated and charted. Step 4 consists of implementing change, using survey feedback to evaluate, and step 5 involves assessing and reinforcing the change. Whilst the chronological process models outlined above have been part of OD for decades, in a rapidly changing external world there has been increasing need to fast cycle through the process (Anderson, 2000).

Conceptualising OD as having a systems orientation, Cheung-Judge and Holbeche (2011: 10) cited Schein (1988) in explaining that *'OD is about building and maintaining the health of the organization as a total system'*. In a similar vein Cheung-Judge and Holbeche's (2011: 11) own definition emphasises a *'focus on the "total system" even if we are asked to look at a specific organization issue'*.

Cummings and Worley (2015) use open systems thinking for their primary diagnostic model, delineating diagnosis and interventions at organisation, group and individual level, as do Senior and Swailes (2010). In the diagnosis stage Cummings and Worley (2015) apply an open systems model. Their comprehensive model contains more detailed information than the overarching open systems model, with organisation, group and individual levels all set out in full. The Cummings and Worley (2015) diagnostic model is based on the overarching open systems model shown below (Figure 3.2).

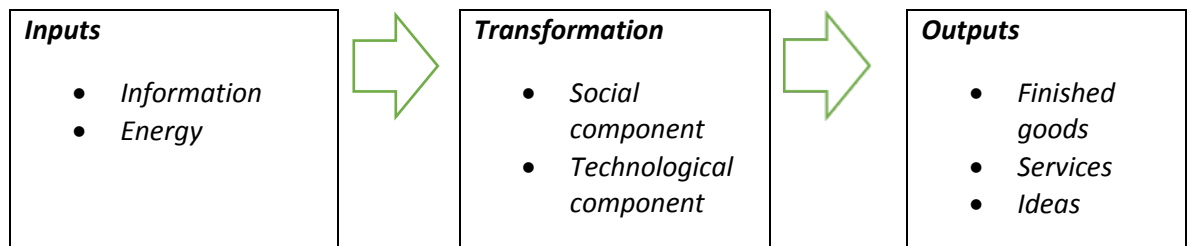


Figure 3.2 The Open Systems Model. Adapted from Cummings and Worley (2015: 92)

At the intervention stage, Cummings and Worley (2015) categorise four types of intervention; human process, techno-structural, human resource and strategic change. They also provide a matrix map of which form of intervention is suitable for the particular level the intervention is aimed at, such as individual, group or organisational level (Cummings and Worley, 2005).

Senior and Swailes (2010) devoted a chapter to soft systems models for change and described OD as being an acknowledged example of this approach. They also outlined process oriented change and challenged the notion of rationality underpinning change. An OD approach tackles change by viewing the organisation as a whole system, in addition to being made up of interconnected parts. As such, evaluation of OD interventions is difficult, as there was no way to identify single causes of change and the clear effects of these causes (Senior and Swailes, 2010).

Using an OD approach on the whole organisation system is time consuming and is not a quick fix. Essentially, it involves a process of facilitating planned change which involves anticipation, diagnosis and evaluation of the alternatives, and the management of change (Senior and Swailes, 2010). This is due, in part, to behaviour from senior management determining the culture used to achieve change.

However, organisations tend to be made up of a balance of forces that have developed over time and changing this balance automatically generates resistance as various parties adjust (Senior and Swailes, 2010).

Traditional OD, as described above, has continued to develop in form. More recent approaches to traditional OD have divergent perspectives, with four identified

stances: development versus change, episodic versus continuous change, planned versus emergent change and diagnostic versus dialogical OD (Cummings and Cummings, 2014). In particular, the relationship between diagnostic and dialogical OD has been extensively explored (Bushe and Marshak, 2009; Oswick, 2009; Wolfram Cox, 2009; Marshak and Bushe, 2009). A dialogic approach to OD has also been introduced. Although pitched as a new form of OD, and for example, appearing in the second edition text of Cheung-Judge and Holbeche (2015) but not in the first (2011) the dialogic approach has been in place since the 1980s. The dialogical approach is coherently pulled together by Marshak and Grant (2008) and Bushe and Marshak (2009) (Bartunek and Woodman, 2015).

Changes in traditional OD over time led to two different eras termed '*Classical OD*' and '*New OD (1980 onwards)*.' New OD includes practices such as '*appreciative inquiry, large group interventions, changing mindsets and consciousness, addressing diversity, and multicultural realities, and advancing new and different models of change ...*' and the '*emerging field of organizational discourse offers sympathetic concepts*' (Marshak and Grant, 2008: S7). This approach utilizes the construction of metaphors in OD practice (Jacobs and Heracleous, 2006) and applying discourse approaches to change (Grant and Marshak, 2011; Oswick et al. 2010). Action research was reframed to include dialogical, critical and conventional forms of the process (Maurer and Githens, 2009). Additional forms of intervention which had not traditionally been under the label of OD began to be included in the field: such as Kaizen (Anderson 2000) and leadership coaching, which had the power to make sustainable change to behaviour (Smith et al. 2009). The recommendation to include a sense making perspective to OD interventions was made (Werkman, 2009).

In terms of the move to using large group organisational change interventions were the following methods:

- *'Future Search Conference*
- *Large-Scale Interactive Process Methodology Real-Time Strategic Change)*
- *Managing Organizational Change (MOC)*
- *Open Space Technology (OST)*
- *Search Conferences/Participative Design*
- *Self-Design for High Involvement*
- *Simu-Real*
- *Technology of Participation (ToP)*
- *Total Transformation Management Process (TPPM)'*

Schmidt Weber and Manning (1998: 236)

However, these larger group interventions were not as popular with OD practitioners as was expected, as they preferred to work at group level (Burnes and Cooke, 2012). In addition, these approaches were not as well received as earlier OD interventions due to being supported by little in the way of theory development or research (Burnes and Cooke, 2012).

This section has explored the nature of the characteristics of traditional OD with a focus on open systems, process and more recent variation. However, there is a need to explore whether traditional OD, and in its more recent forms, are reflected in contemporary UK practice. Therefore, writing on practitioner issues in OD will now be considered.

### **2.3.2 OD Practice, Competences and Skills**

Given the changing nature of academic understanding of OD, it is important to explore the development of OD practice, competence and skills in the USA and UK. There is debate about the USA and UK tradition in the scholarly foundation of OD (Burnes and Cooke, 2013) and as part of that, the extent of divergence in professional practice traditions should also be explored. Some have argued that there is a need for OD practice to be codified, with the fields and definitional boundaries clarified (Cummings and Feyerherm, 2003), and published information on practice, competence and skills has been examined by professional

organisations such as the CIPD in the UK, and the Strategic Human Resource Management (SHRM) and the OD Network in the US.

In the UK, the CIPD (2014b) developed a professional map which includes OD as one of the eight core specialist areas (Figure 3.3).



Figure 3.3 The CIPD Professional Map

The CIPD (2014a) details the following topics as falling within the scope of the OD specialism: OD strategy, planning and business case development; organisation capability assessment; culture assessment and development; organisation development intervention and development; change management and communications; OD methodology; and project and programme management.

Further detail lists descriptors for four levels at which these areas might be performed. However, it is important to note that the professional map was only developed in 2007 (Gillon, 2011), and prior to this OD was not included in the benchmark standards published by the CIPD. In contrast, the US based OD Network has focused entirely on OD from the outset. It provides more detail on the nature of OD, with 141 points under 17 main competence headings:

*Marketing, Enrolling, Contracting, Mini-Assessment, Data Gathering, Diagnosis, Feedback, Planning, Participation, Intervention, Evaluation, Follow-Up, Adoption, Separation, Self-Awareness, Interpersonal, Other* (Sullivan et al. (2001, n/p)

The OD Network (2014, n/p) describes OD as evolving. In providing detail on the competences required, they state their intent to provide '*principles of practice*' to serve as a compass for future training and development of OD practitioners, and as a ruler for current practitioners to assess their practice. In addition, the detail is intended to provide a base for researchers to add new or changed principles, and one of the criteria was developed for clients to evaluate internal and external OD consultants. The Principles of Practice are outlined as being: values-based; supported by theory; systems focused; the application of action research; process focused; informed by data; client centred and focused on effectiveness and health (OD Network, 2014).

### **2.3.3 What is Required to be an Effective OD Practitioner?**

A 1988 SHRM survey concluded that OD practitioners require more general knowledge than those working in other areas of HR specialism (Rothwell et al., 1995: 35). The survey found that it is important for OD practitioners to possess linking skills and '*the requisite background, knowledge, theory base and proficiency of skills*' including: self-awareness, understanding of others, interaction skills, toleration of ambiguity and persistence (Wigglesworth, 1995: 424). It was also found to be essential that OD practitioners develop a clear professional identity, and that OD education programmes emphasise OD's core ideologies, role concept and key characteristics, and an understanding of the vision of the founders of OD (Gottlieb, 1998).

An additional view is that to be effective an OD practitioner must have conceptual, technical, interpersonal and integrative skills (Neilson, 1984). Integrative skills are viewed as the binding for a practitioner to be able to integrate and synthesise conceptual, interpersonal and technical skills (Neilson, 1984). In addition, capability and competence in understanding financial aspects of organisations had become



increasingly sought after, although rarely found in the skill set of OD practitioners (Dunn, 2009).

Conceptual competence for the OD practitioner is not simply concerned with possessing knowledge of behavioural sciences, but also having a voracious appetite for learning about people and organisations (Neilson, 1984). OD practitioners must be capable of conceiving and applying their knowledge in a full and cohesive scheme of approach (Neilson, 1984). OD technical skills should include the ability to accurately diagnose and apply interventions at each level, and practitioners should also have design skills in terms of putting component technical skills together, in addition to applying this appropriately to a given situational context (Neilson, 1984). In developing interpersonal skills, practitioners should develop a *mastery of self* (Neilson, 1984). The concept of the self as instrument should be practised through the development of life-long learning habits, working through issues of power, building emotional and intuitive self-awareness, and committing to self-care (Cheung-Judge (2001). In terms of understanding oneself, the practitioner should know how he or she is affected by others, and how he or she affects others (Burke, 1976).

The OD specialist must understand their own biases, be actively conscious of their own values and aware of how these have changed over time (Burke, 1976). Awareness of self is critical to understanding the effect of formative influences on identity, motives, prejudices, self-image and assessment of personal capability (Cummings and Feyerherm, 2003). Developing knowledge of self should be combined with a commitment to continuously learn theory and research in the subject area of behavioural sciences (Burke, 1976). However, mastery of self for an OD practitioner does not mean seeking to meet personal needs, which would lead them to become detached and objective in action (Cummings and Feyerherm, 2003). Practitioners must also have the personal conviction to challenge for truth when faced with power (Cummings and Feyerherm, 2003).

Experience of combining knowledge and skill (Grieves, 2000) is important for the OD practitioner and, like a journeyman, a process of learning is essential before they can consider themselves to be competent. Familiarity with different change management processes is also essential for professional development (Schein, 2006). Having a fluent knowledge of business, including an understanding of finance and financial decision making, is essential as is having a knowledge of '*strategic formulation tools and conceptual models*' (Anderson, 2000: 7). However, not only process skills are important: having an in depth knowledge of the industry and organisation context in which they work is key to the success of the OD professional (Anderson, 2000).

Eisen, et al. (1995: 493) completed a 4 year study that explored the '*competencies OD would need in the future*', through their activity in the Fulcrum Network at an Organization Development Network (OD Network) conference. The Fulcrum Network was an on-line service for OD consultants who were keen to contribute experiences and discuss ideas (Eisen, et al., 1995). Trends and competencies were considered for each of the themes of Fulcrum which included: broadened frameworks in a global environment; clients and client systems; cultural and demographic diversity and change; values and ethics; and trends within OD such TQM, emotional intelligence and quality of working life (Eisen, et al., 1995).

In the series on contemporary trends in OD, Colwill (2012) noted that OD competencies and skills requirements had typically been developed by those who had been in the field for decades and were looking back in terms of what made them successful, rather than looking forward. The tradition of inherent intellectual elitism in OD (Golembiewski, 1989) appeared to remain. For example, The (American) Academy of Management had a Division of *Organization Development and Change* for some time (Academy of Management, 2015). The primary focus of the Colwill (2012) scholar practitioner text was on doctoral education for OD practitioners, and although not suggesting that doctoral level education was necessary for OD professionals, with 7 pages of 15 dedicated to applying what

practitioners could learn from OD doctoral students (Colwill, 2012), the emphasis was clear.

#### **2.3.4 The Requirement to Challenge Organisational Orthodoxy**

Challenge is a theme which recurs in the literature on OD. Whether working as an internal practitioner or as an external consultant, to be successful an OD practitioner must be able to contest assumptions made at all levels within the organisation. The key for OD practitioners to be effective in challenge is that they '*... need to be confident, highly influential and credible to those they are helping, even if their own presence is low key*' (Cheung-Judge and Holbeche, 2011: 209). In the past, OD has been viewed as failing to achieve a position of power and influence (Beer, 1976: 47). The advice of Kotter on how people can build effective relationships with their bosses might enlighten OD specialists in how they might best become influential and credible experts (Cheung-Judge and Holbeche, 2011). Kotter recommends that executives:

- 1 Make themselves aware of their boss's working style, pressures and strengths and weaknesses.
- 2 Are self-aware – they understand their own goals, needs, personal style and weaknesses.
- 3 Set clear mutual expectations – through applying 1 and 2.
- 4 Are reliable and honest with their boss, they are respectful in their use of their bosses time and resources – and build a good relationship through these actions.

(Cheung-Judge and Holbeche, 2011).

#### **2.3.5 OD and the Field of Change Management**

The relationship between OD and Change Management is complex. Sometimes they are distinct and separate but they are often intertwined. In the foundation of OD, Change Management was part of OD. As the decades passed, Change

Management became a significant subject field in its own right and would often subsume OD within its field. With Lewin's approach to planned change, Change Management was a feature of OD from the outset (Burnes, 2004c). Whilst it is not the purpose of this study to provide a comprehensive and systematic review of Change Management literature, the two fields are inexorably linked with OD tools and techniques suitable for use in the management of change programmes (Burnes, 2004a).

There are differences in the traditional approach to change and the OD approach to change, with traditional Change Management focussing on '*outcomes*' which are '*elite processes – expert led*', whereas OD focuses on process as well as outcomes and is participative in nature, as it is '*people-led with clear parameters set by senior leaders*' (Cheung-Judge and Holbeche, 2015: 155). The focus in Change Management is economic, whereas OD takes a humanistic approach, considering people to be the key to '*economic gain*'. Traditional Change Management is directed and top down, whereas OD is facilitative in nature, seeking to engage and '*give people a voice*' (Cheung-Judge and Holbeche, 2015: 155).

Traditional OD was originally associated with planned change, but other forms of change discussed in Change Management theory from the 1980s were processual and emergent perspectives of change (Livne-Tarandache and Bartunek, 2009) with processual analysis (Pettigrew, 1997) developed as a tool to research the impact of the change process on the organisation. Lewin's work on change had been criticised as being no longer relevant and there was a broad range of perceptions of change, such as emergent, punctuated, continuous or incremental (Burnes, 2004c). Of these, emergent change replaced planned change as it '*was consistent with the free-market, winner-takes-all spirit of the last 25 years*' (Burnes, 2009).

Nevertheless, there were similarities between Lewin's approach to change and the influential ideas of complexity theory (Burnes, 2004c). In any case, it was not helpful to treat planned and emergent change as being in conflict. Indeed, an inclusive view of these two types of change may provide new possibilities for OD research (Livne-Tarandache and Bartunek, 2009).

It is notable that many Change Management scholars rely on mainstream OD scholar sources. Burnes is a primary source for many of the UK based authors, such as Hughes (2006), who are influenced by Burnes' view that the most recent fore-runner to organisational change tools comes from the domain of OD. However there is also a view that change management is new and does not come out of OD (Hughes, 2006). In addition there is a perspective that Change Management is informed by management consultancy (Worren et al., (1999).

In 1969 Beckhard described Change Management as being a new approach which was, at that time, a decade old (therefore Change Management emerged c 1959). In that era, Change Management was about aligning the structures of *'organizations so that they can better adapt to new technologies, markets and challenges, and the dizzying rate of change itself'* (Beckhard, 1969: 9). The timeline for the beginning of Change Management identified as a new approach ten years earlier by Beckhard in 1969, is approximately ten years out from the founding of OD. The timeline for the origins of Change Management (c1959) given by Beckhard (1969) does not tally with the view that planned change had been a feature of OD from the outset (which is generally placed as being c1947), and the concept of change agent originating with the founding father of OD Kurt Lewin (Burnes, 2004a).

The global context of change was significant to the way that both the OD and Change Management terrain developed. Since the post war third quarter of the 1900s was relatively stable, change could be participative, incremental and slow (Hayes, 2014). However, external economic conditions began to change rapidly from the 1970s, meaning that organisational changes were far larger scale and much more rapid in response to that, resulting in the OD participative approach to change being no longer viable (Hayes, 2014).

### **2.3.6 How OD features in the Change Management literature**

OD received relatively little attention in the Change Management literature. Mabey and Mayon-White's (1993) edited text on Change Management includes twenty

two papers from a range of esteemed scholars. Amongst the articles, one presents OD process, one uses a team member as agent of change focus, another refers to team building and the conclusion of a chapter recommends using OD processes. So, of the twenty two chapters, only four reflect any sort of OD orientation. However, Palmer et al. (2006: 192) portrays OD as now taking a coaching approach to change as well as professing that OD has dominated Change Management for over fifty years. One chapter entitled *Implementing Change*, appears to be heavily influenced by conventional OD, and Chapter 8 on the subject of OD, contains debates on Change Management.

Palmer et al. (2006) suggests that those in the OD camp consider those aligned with Change Management as having the pushy approach of the global consultancy firms: focussing on the needs of senior managers to improve financial performance.

Palmer's (2006) view is that those under the change management banner necessarily lack the humanistic value system of OD, although some OD practitioners were influenced by Change Management. For example, Palmer proposes that some OD practitioners have a more vendor oriented approach in terms of selling their services to senior management as the client / customer (Palmer et al., 2006). In this view, the shift from humanistic democratic values to bottom line concerns and the ambiguity of what OD consisted of, acted as terminal threat to OD (Palmer et al., 2006).

Hayes (2014) includes reference to OD roots when discussing the change process by including reference to Lewin's model and force field analysis, and outlines more contemporary approaches including action research and AI. Hayes' (2014) description of the change process is similar to that of the traditional OD process: with both recognising the need for change, diagnosis, vision of future desired state, planning, implementing and sustaining change. Hayes depicts three strategies for change: economic, OD and the '*third way: a combined economic/OD strategy*' which could be implemented either simultaneously or sequentially (Hayes, 2014: 286). Using these approaches sequentially, John Birt focused on implementing change at the BBC by first concentrating using an economic strategy to make the

organisation more efficient, whereas Greg Dyke later adopted a more OD influenced approach to change which engaged employees and was managed in-house. He was seeking ownership and '*buy in*' and brought in the concept of the '*big conversation*' to seek the views of employees (Hayes, 2014: 285).

Whilst Change Management approaches are driven by strategy and focus on several organisational components simultaneously, OD is criticised for not being directly linked to strategy and focusing on only one component at a time (Worren et al., 1999). In addition, whilst Change Management draws on OD techniques it arguably replaces, rather than develops from, the field of OD in three ways (Palmer et al., 2006). First, Change Management has a broader scope: it includes strategy, operations and technology as well as human performance. Secondly, classic OD acts as a third party in a coach or facilitator role whereas, change managers are directly involved, have technical skills and are members of a team of others with a range of skill sets, including organisational areas and strategy: meaning that change managers are more involved and accountable. Thirdly, OD presumes that change in behaviour and attitude results in other changes such as structural change, whilst the Change Management perspective is that changes in structure would drive change in attitude and new behaviour (Palmer et al., 2006).

The role of the change agent in OD is that of a process consultant or a facilitator, whereas in Change Management the role is more likely to be in a cross functional team, a content expert or in a project team (Worren et al., 1999). The purpose of OD is to change values in order to change behaviours, whereas in a Change Management approach, the behaviour is changed first with the modification in values following on later (Worren et al., 1999). Change Management is promoted as being a field which could integrate theories from OD, strategy and technology and using a coordinated approach could deliver on a strategic change agenda (Worren et al., 1999).

However, Farias and Johnson (2000) strongly disagreed with the Worren et al. (1999) perspective, defending the OD perspective and challenging the validity of

Worren et al.'s argument. Hornstein (2001) also defended OD, noting that its failure to find favour with global business stakeholders who focus on short term business goals and financial reward should not lead to it being considered as being defunct.

In terms of which of the fields holds more influence, Palmer et al. (2006) compared the prominence of OD with that of Change Management over the period between 1980 and 2006 through presenting an ABIInform graph of journal article titles. In the 1980s, OD articles outnumbered those with Change Management in the title. However, over the period of study, there was a decrease in the number of articles focused on OD and an increase in Change Management focused articles. The study found that trend reversed in 2006 with a dramatic increase in OD articles, and a decrease in change management articles (Palmer et al., 2006). In terms of the literature, OD had been prominent, became overshadowed by Change Management, but by 2006 was returning to a position of influence.

One view of OD and Change Management was that OD, HR and leaders had to work together to achieve successful change. In organisations that managed change well there was effective partnership between leaders *'(the real OD practitioners), OD and HR experts working together to achieve both the short-term requirements for aligning people and resources with business goals while also working towards the longer term of building future organizational capability'* (Cheung-Judge and Holbeche, 2011: 201).

Although the concept of a learning organisation approach to Change Management might have been considered to be inherent to an OD approach, surprisingly little was written on it within the OD literature. One Change Management text (Senior and Swailes, 2010) included a section on the importance of organisations being learning organisations. In creating a learning organisation, OD aims to put systems in place to enable the organisation to cope with future challenges (Watkins and Golembiewski, 1995). Technical, structural and psychosocial subsystems must all be addressed, and formal and informal systems taken into account (Smither et al., 1996). As well as having a future capability orientation, effort have to be made to



include others beyond just working with the top level (Watkins and Golembiewski, 1995).

The spirit of learning organisations is indirectly embraced in the literature on OD, with Garrow (2009: 6) noting that *'The concept of flexible, agile and adaptable organisation remains central to OD ... one of the distinguishing factors of OD as being reflexive and self-examining to facilitate constant organisational renewal'*. Cheung-Judge and Holbeche (2011: 11) also imply an organisational learning imperative as being central as *'We aim to improve an organization's problem solving and renewal processes'*. Organisational learning is not often referred to explicitly by OD scholars, possibly because it is assumed to be a fundamental part of OD.

### **2.3.7 A Consultancy Approach to OD**

Threaded throughout the OD literature is the view that internal or external specialists hold consultancy oriented roles, and that *'External consultants have played a central role in' OD 'from its inception'* (Gallos, 2006: 363). The role of OD practitioners as consultants was assumed by Rothwell et al. (1995), who noted that OD consultants already carried out the role of change agent, but that there was a requirement for them to acquire more formal knowledge of organisational practice and theory (Rothwell et al., 1995).

In order to be successful, an internal consultant must understand the business issues, provide bespoke solutions, and communicate effectively, efficiently and proactively (Weiss, 2006: 471). Internal consultants should also do the foundation work by learning the business through working in other roles and seeking interaction, and regular feeding back, on the process(es), avoiding the use of jargon and applying only validated tools (Weiss, 2006). Additionally, it is important that consultants set and evaluate progress against metrics, take and share credit, use supporter testimonials and document success. One significant part of the consultancy role is to disagree and be able to challenge any *'the emperor's new clothes'* rhetoric (Weiss, 2006: 471). Furthermore, as long term participants in an

organisation, internal consultants are also accountable for producing sustainable outcomes aligned with organisation strategy.

However, Beer and Walton (1987) advocate moving away from a consultant centred approach to OD where its functions are within the remit of the general manager. OD should also lead organisational leaders in placing an increased focus on the selection and development of leaders (Beer and Walton 1987). Getting the selection and development of organisational leaders right, has long been an issue (Burke, 2011).

### **2.3.8 A Behavioural Science / Organisational Culture Focus in OD Practice**

The term *behavioural science* was coined in the USA, to cover a broad spectrum of social-psychological practices and concepts (Burnes and Cooke, 2013). One interesting perspective on the context in which this term was chosen was that in the era of McCarthyism, *social science* was considered as sounding too much like socialism, and therefore a term that was best avoided (Burnes and Cooke, 2013)!

French and Bell (1999: 25) noted that ‘...All authors agree that OD applies *behavioural science to achieve planned change*’. Cheung-Judge and Holbeche’s view of the importance of knowledge of human behaviour to the OD, HR and HRD professions was confirmed by the addition of a chapter on behavioural change in the second edition of *Organization Development - A practitioner’s guide for OD and HR* (Cheung-Judge and Holbeche, 2015). Historically, a behavioural science approach, principally in the guise of sensitivity and laboratory training, dominated much of the early development of OD. As such, it was important to provide more detail as to what this entailed.

Reflecting its importance, Bennis had, in 1969, devoted a chapter to sensitivity training, which was developed alongside T group training, describing it as:

*'... laboratory training is a small group effort designed to make its participants more of aware of themselves and of the group process. The group works under the guidance of a professionally competent behavioural scientist and explores group processes and development through focussing attention on the experienced behaviour of its members'.*

Bennis (1969: 61)

The use of these groups aroused curiosity, they also caused anxiety, and although their use was considered controversial they were popular (Bennis, 1969). Some expressed strong support for the use of laboratory training and were labelled as 'cultists' by those who were against it (Bennis 1969). Laboratory training was not designed to tackle emotional difficulties but to enhance working life; presupposing that participants already had a 'higher degree of emotional health' (Bennis, 1969: 62). Participants with less open personality types and those who were more structured in their approach may have found sensitivity training more difficult to cope with (Bennis, 1969). A manifestation of the potential problems associated with this approach included, at its most extreme, '*... an attempted suicide by one of the participants in the training shortly after his return from the week ...*' Bennis (1969: 62). However, there were situations in which the training worked and proved to be helpful (Bennis, 1969).

In contemporary OD, the importance placed on behavioural science is linked to the extent that organisations believe change is essentially a social process that comes primarily from modification of human behaviour (Stanford, 2012 citing Cummings 2004). Attention to the roots of the psychological foundations of OD supports the acceptance of its relevance (Stanford, 2012, citing Cummings, 2004). Drawing on this field of knowledge remains of relevance to OD, and it is argued that '*We use the technology of applied behavioural science to support the organization towards healthy development.*' (Cheung-Judge and Holbeche, 2011: 11). In the USA, the NTL still run '*Human Interaction Laboratories*' (NTL, 2014: n/p) as well as training for OD practitioners.

There is little in the way of formal training or education provision in OD in the UK, and of that which does exist, only some is related to behavioural sciences. Cheung-Judge's consultancy organisation, Quality and Equality (2014), provide NTL accredited programmes for OD practitioners. Roffey Park (2104) provide training programmes for OD practitioners, and also a programme aimed at leaders improving their relationships at work which includes feedback, and the Programme Director is listed as having a Certificate in Gestalt. Whilst neither of these programmes use either of the original labels, they appear to borrow some features from the forebears of sensitivity, T group and laboratory training.

There had been an interest in organisational culture as a feature in OD in the last 20 years of the twentieth century (Woodman, 1989). However, its mention in OD literature was less than might have been expected: for example it was not mentioned in Table 3.1 (containing themes of definitions of OD and key authors) above. Nevertheless, given the focus of OD on system wide change the '*construct of organizational culture gives us another, possible useful, way to talk about changing whole systems*' (Woodman, 1989: 218). Although the OD community recognised organisational culture as part of the field, there had been no development of thinking on organisational culture and much of the scholarly work on it had come from elsewhere (Beer and Walton, 1987).

With regard to people and culture in organisations there is a recurrence of interest in employee engagement (Cheung-Judge and Holbeche, 2015). In the second edition of their text, the chapter on culture change (in Cheung-Judge and Holbeche, 2011) was removed and chapters were added on employee engagement and building organisational agility and resilience, including reference to the cultural aspect of this (Cheung-Judge and Holbeche, 2015). This suggested that the subject of organisational culture itself was not of interest except for it being embedded in the purpose of OD.

### 2.3.9 Organisational Effectiveness

In the area of organisational effectiveness, practice was leading research and theory (Woodman, 1989). Organisational effectiveness had featured as an OD goal from early on, as '*... improved effectiveness in performance and improved organizational health with the ability to remain effective*' (Beckhard, 1969: 100). In the 1980s the focus on effectiveness continued, with OD considered as continuing to contribute to the field of high performance and high commitment work systems (Woodman, 1989).

In the post millennium period, Rainey Tolbert and Hanafin (2006: 70) state that '*... The goal of OD is to enhance organizational effectiveness by attending to both human and organizational needs*'. The commitment to effectiveness is at the core of OD practice, as important as the assumptions, values and ethics that accentuate its '*humanistic orientation*' (Burnes, 2004a: 267). Effectiveness takes centre stage in a recent UK text, with a title of *Organisational Effectiveness: A New Agenda for Organisational Development and Human Resource Management*' (Francis et al. 2012). Although effectiveness has long been a focus for OD (e.g. Golembiewski, 1989), it is claimed that this is a new form of organisational effectiveness which '*reflects a powerful ethic of mutuality ... is eclectic*' and '*... (re)regenerative*' (Francis et al. 2012: 336).

However, there is an inherent tension as there has always been a strain between *effectiveness* and *the well-being of the employees*, and managing this paradox is a difficult but key skill for OD practitioners (Beer and Walton, 1987). Planned change originally focussed on resolving '*social conflict in society, including conflict within organisations*' (Burnes, 2004a: 279), with the argument being that this would, in turn, lead to improvement in the effective operation of the organisation. Although planned change within OD has developed, the emphasis on effectiveness has remained (Burnes, 2004a).

### 2.3.10 Taking a Strategic Approach in OD

Taking a strategic approach is discussed at length in the mainstream HR academic community (e.g. Boxall, 1996; Paauwe and Boselie, 2003; Wright et al. 2005). In HR, the focus should be on strategy implementation rather than on strategic positioning. Differentiation should be made to HR architecture according to the business processes, and priority focus should be on the performance of those who are in strategic job roles (Becker and Huselid, 2006).

A workforce strategy mind set is far more likely to provide success than a focus on HR architecture (Becker and Huselid, 2006). By the very nature of seeking to become more strategic, such closely aligned fields such as HR and OD have to work together (Yaeger and Sorenson, 2009). Indeed, '*...True organization development, by definition, is strategic*' (Head, 2009: 23). Operating strategically should not negate the need for OD practitioners to perform well tactically and at group and individual levels in the organisation (Anderson, 2009). In addition, alternative drivers may be used for implementing strategy at different organisation levels (Holst-Mikkelsen and Poulfelt, 2009).

Whilst the original focus of OD was on work groups, some argued that there had been a major shift in from the team level perspective, to an organisation level focus and impact (Burnes, 2004a). Furthermore OD must strengthen its strategic perspective (Anderson, 2000; Burnes, 2004a). There were three reasons for this change in emphasis (Burnes 2004a):

1. With regards to job design and socio-technical systems, OD practitioners realised that there was more to do than simply work within groups, they therefore developed into using an open systems perspective.
2. This in turn led to being involved in the management of organisation culture and OD practitioners became interested in organisational learning.
3. The increasing turmoil in the environment and growing use of organisation wide perspectives led to awareness amongst OD practitioners of the

importance of viewing the transformation of organisations in their totality, rather than simply focussing on individual constituents.

OD had traditionally focussed on micro rather than macro issues, but as the field developed, a more strategic system wide and external environment approach was required if OD was to survive: especially when it was to operate in a multi-national environment (Woodman, 1989). Not only was this important to the OD profession but organisations were increasingly going through changes, such as: a change in strategy due to expansion; change in business process; restructuring; and acquisition and / or merger. Whilst organisation design interventions are first required in these instances, these should be accompanied by OD initiatives to achieve the cultural change which would successfully embed strategic change (Cheung-Judge and Holbeche, 2011).

In addition to being used to facilitate culture change, strategic OD has been utilised to integrate strategic change, network and alliance interventions, organisational transformation, mergers and acquisitions, learning and self-designing organisations and knowledge management (Yaeger and Sorenson, 2009). It has also been used to strategically orient global, multinational, international and transnational management (Yaeger and Sorenson, 2009). Increasingly, organisations have been siting parts of their operations offshore, with team members situated in different countries (Anderson, 2010). All of these contexts have an impact on where and how OD operates, and a primary role for strategic OD has been to ensure the alignment of the competence of the organisation with the mission of the organisation (Yaeger and Sorenson, 2009).

A more recent focus for strategic OD has been in the use of positive change interventions and in particular the adoption of AI (Yaeger and Sorenson, 2009). Use of rhetoric such as '*OD Value Cycle*' and '*creative organisational change*' also implies a more positive approach (Anderson, 2000: 9, 31). However, it could be claimed that this has been simply spin, as might have been concluded from the use of language such as '*Lead With a Need for Speed*', although arguably, there was a

fundamental '*Need for Speed*', since it led to competitive advantage (Anderson, 2000: 121).

Whilst OD practitioners may seek to be strategic, the term itself is ambiguous (Anderson, 2009). Common in definitions of strategy is that success varies according to the nature of the context (Anderson, 2009). Therefore, this implies that for OD practitioners to be strategic, they must have an understanding of the world external to the organisation (Anderson, 2009). As the external context of any strategic approach is a rapidly changing environment, at times the nature of change may threaten the very survival of an organisation. In order to be considered of relevance, OD practitioners have to be aware of external threats to organisation performance and survival, and proactively operate to provide appropriate contextual support (Anderson, 2009).

It has been proposed that the integration of OD and strategy could lead to them becoming a formidable force in delivering transformational change (Palmer et al., 2006). Top down change combined with bottom up change is arguably the most effective approach. Top management have to be absolutely committed to the process of bottom up change, using OD principles and practice, for it to be effective (Palmer et al., 2006).

## The Context of the Environment of OD

A myriad of background circumstances play a part in the practice of OD. This section will explore the general context of OD, its relationship with HR and HRD and discuss the role of relevant professional associations. The literature on values and ethics in OD will be examined, highlighting criticisms including the failure of OD to address issues of power and politics and to follow sound evaluation processes. It will also discuss why those criticisms are amongst the reasons why OD is often dismissed as being a fad or fashion.



### **2.4.1 Social Change Context**

The ambition of OD to humanise workplaces in the 1950s took place in the context of routine and repetitive employment where initiative was punished and compliance was assumed to be required. However, routine and repetitive work environments became increasingly rare (Beer and Huse, 1972). The nature of work was changing and as such, OD was increasingly seen as having a key contribution to make to the performance of organisations where there was an increasing reliance on a scarcity of skilled knowledge workers (Purser and Pasmore, 1992).

### **2.4.2 National Context**

The national context was another relevant circumstance at the root of assumptions being made. Whilst OD was seen as being desirable as an approach outside of the USA and UK, people in other cultures with different learning styles, reasoning preferences and value systems were not currently equipped to cope with it in the form it was practised in the US and the UK (Wigglesworth, 1987).

There was a need to challenge the assumption that OD could be in the same way in all national cultures (Palmer et al., 2006). US centric traditional OD assumptions did not match Confucian / Taoist beliefs across a range of measures with respect to perceptions of change (Marshak, 1993). With reference to the theories of Geert Hofstede and Fons Trompenaars on national culture, applying OD in other countries required consideration of the national culture environment (Rothwell et al., 1995; Fagenson-Eland et al., 2004). However, a study conducted in Hong Kong found that there was no simple choice of OD interventions which would work, or not, in different national cultural contexts, and as such, it seemed that national culture affected the effectiveness of some OD interventions, but not all (Lau and Ngo, 2001). System level interventions with significant HR focus were found to affect organisation performance, but it was less clear whether interventions at individual level did (Lau and Ngo, 2001).

An example of the difficulty in importing OD approaches from the USA to another national context was seen in Poland after it moved to a market based economy

(Yaeger et al., 2006). Using USA centric OD approaches as though there was no influence from deeply embedded national political and historical experiences, a team of experienced and credible OD professionals completely failed in their endeavour to assist in the development of commercial enterprises in Poland (Yaeger et al., 2006). There were a variety of issues which had to be taken into account in working in different national contexts: national, cross national and the convergence / divergence of organisational culture as well as the compatibility of the national culture with OD values (Yaeger et al., 2006). The national economic environment had an influence on OD work, as did the national and international legal framework (Yaeger et al., 2006).

#### **2.4.3 Organisational Context**

Another aspect of context for consideration is concerned with where OD might sit in an organisation and who might be the best to *own* it. This issue will be explored further, but the organisational circumstances in which an OD approach is needed should be the first issue to be reviewed. The conditions which often create a need for OD are: rapid and unexpected change, growth in size, increasing diversity and change in managerial behaviour (Bennis, 1969).

There are ten additional situations in which OD should be applied, where there is a need to: change the managerial strategy; improve the consistency of the match between organisation climate, the changing external environment and individual employee needs; address cultural norms and re-design roles and structures; improve intergroup relations and collaboration; open communications channels; advance planning processes; attend to problems which have arisen from a merger; increase the motivation of the workforce and finally to adapt to a new environment (Beckhard, 1969, 2006). The spaces in which OD can work are described as: business strategy; organisation design; the structure of work; workspace design; organisational culture; workforce development; team development; and leadership development (Gallos, 2006).

The level of the organisation at which OD practice sits and who leads on OD issues is also of importance. There is a view that '*The primary practitioners of OD are the organization's managers, not HR/OD professionals*' (Cheung-Judge and Holbeche, 2011: 11). OD practitioners are not those responsible for leading change and that the term *change managers* related to senior managers and Chief Executive Officers (CEOs) (Beckhard, 1969). OD practice fits better with the terminology of *change agent*, who could be externally or internally placed and provide consulting or technical support in the Change Management process (Beckhard, 1969). What is key is that the OD practitioner is not the person in charge, they are the third party change agent assisting the person in charge (Cheung-Judge and Holbeche, 2011 citing Marshak 2006).

#### **2.4.4 OD's Relationship to HR(M) and HRD**

As OD, HRM and HRD are all professions that concentrate on issues of people in employment there can be fuzzy boundaries between them, and all have faced their own evolutionary challenges. At this point it would normally be useful to provide definitions of HRM and HRD. However, just as OD has blurred boundaries and has developed in form over time and contextual difference, these issues which lead to difficulty in definition also extend to HRM (see Boxall, 1996) and HRD (see McLean and McLean 2001).

In the case of HRM, HR and OD have very different agendas. HR is content driven whereas OD practitioners are process specialists involved in assisting people to derive benefit for themselves. They are also experts in change and apply their skills to business and group issues (Stanford, 2012). Challenging senior leaders and asking difficult questions is also inherent within the role of OD (Stanford, 2012). In contrast, HR is more involved with content which is what differentiates it in its contribution to the success of the organisation (Stanford, 2012).

HR has had its own change journey: from Personnel to HR, the re-engineering of HR in the adoption of the Ulrich Model and the challenges of this re-engineering and the imperative to add strategic value (Cheung-Judge and Holbeche, 2011). USA-

based Anderson (2009: 105) described the change in HR to have been so extreme that he called it a '*metamorphosis*'.

The expanding HR agenda requires an OD frame, so it is important for HR and OD to explore how they might work together (Cheung-Judge and Holbeche, 2011).

Furthermore both OD and HR powers '*can wax and wane*' (Cheung-Judge and Holbeche, 2011: 210). HR professionals are generally embedded in organizations as '*business partners*' whereas OD practitioners can be either internal or external to the system. Internal OD practitioners often have to operate as though they are external consultants, as this is essential to enable effective challenge (Cheung-Judge and Holbeche, 2011: 210).

OD has a long term focus, whereas HRD improvements concentrated on '*individual and team performance improvement and/or personal growth*' and HR works by '*aligning HR practices and people processes to the requirements of the short-term business agenda*' (Cheung-Judge and Holbeche, 2011: 209). In the case of HR and HRD it could be argued that HR and HRD have been joined as professions in the UK for decades. In 1994 the professional bodies for Personnel Management (The Institute of Personnel Development [later the CIPD] {IPD}) and Training and Development (The Institute of Training and Development {ITD}) merged (CIPD, 2014b). This converged model of the three professions (HRM, OD and HRD) is not found in the USA (Ruona and Gibson, 2004).

Since HR are increasingly expected to take the lead in organisational change (Cheung-Judge and Holbeche, 2011), there is increasing demand for HR professionals to have OD skills (Sharkey, 2009) and it is natural for HR and OD to be more frequently compared. A challenge for HR is to consider to what extent they are capable of OD, or if they should '*bring / buy*' in these skills and experience (Cheung-Judge and Holbeche, 2011: 197). Senior Business Leaders need change agent HR professionals who can advise on matters of Change Management and culture change, in addition to advising on organisation design and redesign: all of

which required at least an understanding of OD (Cheung-Judge and Holbeche, 2011).

Furthermore, there is an increasing expectation that HR professionals should be capable organisational architects: designing and enabling organisational agility through self-renewing and flexible organisation cultures, and using HR processes to alter behaviour (Cheung-Judge and Holbeche, 2011). Working in partnership, it is proposed that HR and OD can add to an organisation's competitive advantage sustainability by designing organisations which are '*built-to-change*' (Sweem, 2009: 155).

In order to be seen as being effective, HR needs to assist clients through major change: to take responsibility for determining organisation design and improving the wellbeing and health of both organisations and individuals (Stanford, 2012). HR also needs to apply HR approaches in order to develop future capability and address short-term business requirements (Stanford, 2012). Another area where HR and OD should act together strategically is in the development and implementation of approaches to talent management (Sweem, 2009), taking into account that within the Resource Based View of organisations, consideration of culture is critical to its success (Sweem, 2009).

To be effective, OD and HR professions have to act in tandem within organisations. OD is successful as a result of considering the needs and reactions of employees (Cheung-Judge and Holbeche, 2011). HR policies and practices can be used to create "*great places to work*' that are both affordable to the business and attractive to the '*right employees*' ... '*This mutuality of interest is at the root of sustainable high performance, HR's strategic mission*' (Cheung-Judge and Holbeche, 2011: 201). OD has played a key role in supporting the development of social work systems, including at the whole system level, to enhance sustainability (Docherty et al. 2009). Ruona and Gibson (2004) contend that the way forward for success in the 21<sup>st</sup> century is for OD, HRM and HRD to converge.

From a functional point of view, HR focuses on the management of people in an organisation, and the links between this HR function and OD have been the subject of debate (Francis et al. 2012). The question of whether OD should come within the personnel function is contingent on power relationships (Beer, 1976) and if the personnel function is powerful in the organisation then OD should be placed within that function. However, if personnel is not a powerful function, then the OD function should seek to be placed elsewhere.

In a more specific view on the extent of the relationship between OD and the HR function, there are five models of how OD might be situated in an organisation:

1. A traditional model: where OD is situated within the HR function
2. An internal model : where OD is not situated within HR, but reports to another function, such as senior management in strategy / administration
3. A decentralised model: where OD reports within business units to either a business unit head or the HR Director
4. A fully integrated model: where OD is integrated directly within all aspects of the HR function
5. Integral to CEO level model: OD is involved in strategy setting, reporting in a strategy function that reports direct to the CEO

(Burke, 2004)

A small scale UK empirical study (responses n=106) was conducted between late 2010 and early 2011 to test the application of these models (Francis et al., 2012). The first set of data was collected from attendees at a CIPD Conference, the second set from respondents in the National Health Service (NHS) in England. It was found that in approximately a quarter of cases, the preferred option was for OD to be situated within the HR function (Francis et al., 2012). Organisational effectiveness was considered to be strongest if the decentralised model (type 3) of OD was adopted, and the traditional form of organisation (type 1) was considered to be the least successful (Francis et al., 2012).

A linked issue is where OD was best situated, in relation to who was accountable for OD activity, and how this might properly vary depending on the organisational level of the OD issue. For example, if an issue is a corporate level OD issue, then the responsibility / accountability and work flow, may be different from an OD issue at a divisional or department level (Anderson, 2009). It was also argued that HR and HRD are not the only disciplines that OD should be aligned with, and that there was the possibility of working fruitfully with, for example, IT and engineering professionals (Dunn, 2009).

Despite difference in the history, mode of operation or values of HR and OD functions, they have been pushed to work together (Stanford, 2012). USA based Ruona and Gibson (2004: 51) considered that OD had not been subsumed within HR, at least '*not yet*'. However, it is viewed as being achievable and desirable that by '*working together HR and OD*' can produce an innovative form of organisational effectiveness (Stanford, 2012: 211).

#### **2.4.5 Professional Associations**

This section will focus on the literature on the professional status of OD. As identified in chapter 2, professionalisation is a key factor in the conceptual development of a field, yet Bradford and Burke (2004: 372) were emphatic that '*OD is not a profession*' in the same way as the legal, accountancy and medical professions. Weidner, II and Kulick (1999) defined OD as an occupation rather than a profession, but OD should nevertheless operate professionally (Bradford and Burke, 2004). As these authors are USA based, it should be noted that, as with other elements of OD, the denomination of professional status may differ both across and within national contexts.

Arguments for and against the professionalisation of OD are based on the understanding that it provides a form of occupational control (Weidner, II and Kulick, 1999). Those against argue that professionalisation inhibits the free market practice of OD and opens up the possibility for regulation (including who can practice) from within OD and from outside, in the form of state or government

control (Weidner, II and Kulick, 1999). Those in favour argue that professionalisation would lead to a higher level of quality control of practice and the potential for monitoring of practice, which could mitigate against ethical abuse (Weidner, II and Kulick, 1999).

Other arguments in relation to the professional status of OD are based on the creation of a body of knowledge and the opportunities it would provide for the development of an OD community of practice, and for the development of a public identity (Weidner, II and Kulick, 1999). The primary objective of forming associations is not to promote the interests of others (e.g. society), but is for the good of the members of the profession (Weidner, II and Kulick, 1999). However, professional associations do generally promote ethical conduct and their members seek to act professionally (Weidner, II and Kulick, 1999). Professional associations also provide a vehicle to minimise competition for work, which enhances the economic prospects of their members and allows practitioners a level of independence of judgement through reference to professional norms and regulations (Weidner, II and Kulick, 1999). A sequential route to OD becoming a profession has been proposed, which would involve: being recognised by the state; training and university education; forming as a professional association; seeking licence from the state; and establishing a code of ethics (Weidner, II and Kulick, 1999).

In the USA, the NTL raised the issue of accreditation, but found their membership did not want this. The OD Institute introduced an accrediting process and a code of ethics, but to little avail (Bradford and Burke, 2004). So, what of the position of other professional communities in the development of OD as a profession? The bodies considered to operate in the professional domain of people in employment are the CIPD in the UK; the USA founded OD Network and the European OD Network which was founded in 2012 (OD Network Europe, 2014); and the USA based SHRM.



In the USA the OD Network was founded by Burke in 1971 (Stanford, 2012), and no current membership numbers are available. In the UK the CIPD was founded in 1913 and has a current membership of 130,000 professionals (CIPD2014a). In the USA, SHRM was founded in 1948 and has a current membership of 250,000 (SHRM, 2014). The CIPD has a much longer history (CIPD2014a, SHRM, 2014), it has more than half the number of members of the USA bodies which covers much larger and more highly populated geographical areas. As such, the saturation of membership amongst the UK HR professional grouping appears to be much more dense.

In the USA OD established itself as a profession with its own professional body and code of practice, with membership of the profession made up of consultants from academics, consultancy practice or public and private sector organisations acting as consultants (Burnes, 2004a). There is currently no UK based OD professional organisation and no qualifications are required to be a member of the OD Network. Conversely, the CIPD has, for decades, had stringent standards, levels of qualifications and validated experience linked to its membership levels.

As demonstrated earlier, the CIPD has encapsulated OD within its professional map as one of the core specialist areas of HR (CIPD, 2014a). In this regard, one could argue that in the UK the CIPD has been making a '*land grab*' to own the profession of OD. The ethos of the CIPD and SHRM is that HR should '*... be seen to step up to the mark*' and make a tangible difference to the future of organisations (Cheung-Judge and Holbeche, 2011: 200).

A driving factor for the OD profession has been that, as with any profession or trade, customers are required for what you provide. In order that the profession can be viable, customers must receive what they perceived to need. If not, the profession will go out of business (Burnes, 2004a). Although the fiduciary character of professional work is that there is an implicit contract for ethical and competent services and client needs should take priority over a practitioner's '*need to make a living*' (Weidner, II and Kulick, 1999: 335).

#### 2.4.6 Values and ethics for the OD profession

A regularly recurring theme in the literature was that of values and their integral nature to the field of OD. The *'OD approach to change is, above all, an approach that cares about people'* at all levels, and that change can only truly happen when people consider that they have a good Quality of Working Life (QWL) (Senior and Swailes, 2010: 317). Not only are values the scaffolding of OD, they are also the reason that many practitioners first choose OD as a career (Anderson, 2009).

Ethical and humanistic values, such as social justice and democracy, formed part of OD from the outset. OD focuses on choice, fairness, human development, and openness with constraint balanced by autonomy (Cummings and Feyerherm, 2003). Values are linked to organisational effectiveness: *'Underpinning OD is a set of values, assumptions and ethics that emphasise humanistic orientation and its commitment to organisational effectiveness'* (Burnes, 2004a: 267). Hayes (2014: 281) also emphasises the implicit nature of values from the origins of OD with:

*'a series of studies on autocratic and democratic leadership produced findings suggesting that participation and involvement led to improved outcomes, which stimulated the development of a new approach to managing change, known as organization development (OD), based on these values'.*

Hayes (2014: 281)

The importance placed on ethics continues with Cheung-Judge and Holbeche (2011) who situate OD as having humanistic democratic values, in that people have to be given a voice in changes that affect them. When they emerged in the 1950s, OD values were considered revolutionary although they became accepted as a mainstream view (French and Bell, 1999). They followed scientific management, the:

*'... humanistic approach of OD began to replace the machine metaphor of organisations with natural images of body and health and drew on the behavioural sciences to suggest how people, systems and technology could be organised in more effective and humane way. The key strands of work that form the core of classical OD relate to humanistic values, training and development, employee feedback, systems thinking and action research.'*

(Garrow, 2009: 2)

In 1969, Beckhard laid out six principles on these revolutionary values in relation to how a workplace should be viewed by OD practitioners: 1. People are more autonomous and independent – as it should be. 2. They have choices in their work and leisure, and should have these choices. 3. Employees shouldn't be concerned with basic security needs, but able to concentrate on realising their potential and their self-worth. 4. If there is a conflict or tension between the organisation's needs and the person needs, they can and should put their needs first. 5. The organisation should provide work which is organised in such a way as to make it meaningful / interesting as well as providing sufficient monetary rewards, and 6. Managers should no longer retain the level of power they have had in the past. Instead of using coercive measures to manage, including the withholding of financial rewards, employees should have choice in leisure and in work, so managers should use other methods to influence and motivate employees (Beckhard, 1969).

Issues of ethics and values form part of the landscape of professions which are '*... built around strong norms and values about how one is to conduct oneself ... yet it is clear that norms and values relating to professional conduct are at best loosely held and agreed upon*' (Church et al., 1992: 22). The construct of ethics is often accompanied by the issue of clarity through declarations of the need for professional codes of practice, in order for OD practitioners to have a moral baseline against which to measure their actions (Cummings and Feyerherm, 2003).

However, it is not easy to regulate OD and since it cannot be defined easily, set rules are not appropriate and situational approaches are instead necessary (DeVogel et al., 1995). There is though, an issue on the ethical decision making principles and values of its practitioners (DeVogel et al., 1995). There are no definite standards or qualifications set in OD nor is there a professional association which represents the community with authority (DeVogel et al., 1995). What should take the place of regulation is the application of individual professional ethics, which take into account society's legitimate interests and concerns specific to that area of professional practice (DeVogel et al., 1995).

The OD Network (2014) published *'Principles of Practice'* where *'The practice of OD is grounded in a distinctive set of core values and principles that guide behavior and actions'*. This outlines the key areas of respect and inclusion, collaboration, authenticity and self-awareness. The focus on adherence to values is also demonstrated by their publication of an Organization and Human Systems Development Credo (OD Network, 1996). Even the Network's definition of OD is saturated with their pervading approach to values, noting that: *'Organization Development is a dynamic values-based approach to systems change in organizations and communities; it strives to build the capacity to achieve and sustain a new desired state that benefits the organization or community and the world around them'*. (OD Network, 2014).

With DeVogel et al.'s (1995) view that one set of rules for OD does not work, self-regulation and audit is an alternative approach to ethics (DeVogel et al., 1995). This could be achieved by, for example, the use of a Values-Clarification Instrument, which allows the consultant to self-evaluate their value preferences on the topics of: Client Autonomy, Informed Consent, Collaboration, Objectivity & Independence, Confidentiality, Truth Telling, Professional Development, Social Justice, and Recognizing Limits (DeVogel et al. (1995).

Interestingly, in the UK the CIPD do not mention values with specific reference to OD in its professional map, but have an overarching Code of Professional Conduct which includes five points on integrity and ethical standards (CIPD, 2014c).

However, there is a view that there is a fundamental difference between OD and HR which *'may have lost sight of its original values.'* In HR *'the people champion'* role is now seen as *'soft'*, and no longer *'relevant to the needs of business'* (Cheung-Judge and Holbeche (2011: 208). Although *'HR is more firmly identified with business needs'*, they should have rebalanced and reclaimed the *'people champion'* emphasis in at least equal balance with *'organizational champion'* (Cheung-Judge and Holbeche, 2011: 208).

However, a question arose for the author in relation to the numerous short statement references to humanistic values and ethical concerns. Are authors applying the same meaning and using the same yard stick? If these terms are not qualified, are scholars using the same meaning or lifting and applying labels without much conscious thought? Cummings and Feyerherm (2003: 99) cited Tannenbaum and Davis (1969) as the original source for outlining the humanistic values of OD, and noted that *'For a long time, this list represented the de facto statement in the field'*. There had been a definitive list, but since this was rarely referenced, we cannot assume that all authors used this list as their baseline.

Tannenbaum and Davis (1969) consider their values to be consistent with working in the field of behavioural sciences, which is *'deeply rooted in the nature of man and therefore basically humanistic'* (Tannenbaum and Davis, 1969: 69). With thirteen statements, although there was a breadth of topic, these issues are usually wrapped simply under the labels *humanistic* and / or *democratic* values by others. However the original list had more variety than might be covered by those terms e.g. *'Away from Avoidance of Risk-Taking toward Willingness to Risk'* (Tannenbaum and Davis, 1969: 69). In addition, there have been changes in values over time as OD scholars in the early 1990s reviewed the lists of values and *'noted that the practice of OD had become more "results" and "bottom line" oriented'* Cummings and Feyerherm (2003: 99)

The usefulness of OD values is a much debated topic in the context of a changing world. In transformational change, what might be good for senior managers and the organisation does not necessarily match what is right for society or for individuals (Underwood Stephens and Cobb, 1999). Executive groups are the decision makers and the choices they made are unlikely to be governed by moral fairness and equity (Underwood Stephens and Cobb, 1999). However, van Nistelrooij and Sminia (2010) argue that through dialogue, shared perceptions between the various parties affected can be achieved.

Moreover, OD values were developed primarily in the USA, and to assume that, for instance, democratic values could be applied in the same way in different national contexts is inherently flawed (Yeager et al. 2006). There is duplicity within OD adherence to values (Palmer et al., 2006): with OD practitioners criticising the change management camp as being a faddist panacea provided by management consultants for commercial gain, whilst arguing that as a discipline, OD had become more strategic and holistic in approach (Palmer et al., 2006). OD practitioners were concerned about being identified as part of the Change Management community, but for the OD community to suggest that they could keep their values intact whilst increasingly having their practice driven by the needs of business leaders, was hypocritical (Palmer et al., 2006).

Over time, OD moved considerably from its roots in planned and group based change and developed into a much greater focus on OD's organisation wide transformational approaches. However, the organisation wide approaches were less refined, less clear and less well established (Burnes, 2004a). Ironically the more OD focused on organisation wide issues, the less closely connected it was to teams and individuals, and lost its core democratic / humanist values (Burnes, 2004a). However, Anderson (2009) argued, that in concentrating on core humanistic values, OD had lost sight of the *organisation* part of its name. In continuing to adapt and maintain its currency and relevance, OD was losing touch with the core values which had always been its distinguishing feature: the paradox being that, in the postmodern world, these values which support empowerment, consensus-building, equality, and horizontal relationships are exactly what is required (Burnes, 2004a).

Another inconsistency is identified in that if OD is concerned with changing behaviour, to what extent can that be considered as an ethical and values based objective (Stanford, 2012)? Stanford (2012) argue that to aim to change the behaviour of others is in itself a manipulative and questionable act. That an OD practitioner might prescribe the behaviour which they consider to be in others' interests, is arguably riddled with assumption and value judgement, and also contrary to the humanistic value set lauded by OD professionals (Stanford, 2012). In

addition, the application of democratic principles and consultation mean that if the views of stakeholders are not put into practice, they may disengage: judging that if meaningfully solicited, they have the right to expect changes to be fully aligned with their views (Bradford and Burke, 2006).

Nevertheless, the call to '*Return to Lewinian Values*' (Burnes, 2009: 359) is strong. The late 1970s marked the end of the post war approach to economics and politics, which had emphasised '*common good*' over gain for the individual and state regulation was loosened in the interests of market forces (Burnes, 2009: 374). However, this ethos was and continues to change: with the financial crisis; the increasing awareness of environmental issues; organisations becoming more interested in putting social responsibility over profit; and the influence of President Barack Obama (Burnes, 2009). An emergent approach to change may have fitted with the previous political and economic era, but in a world where there was more support for ethical approaches to business '*an ethically-based approach to change*' was more pertinent, the only way to successfully deliver the changes required (Burnes, 2009).

#### **2.4.7 Critiques of OD**

OD has been subject to criticism in the UK and in the USA; with particular questions as to whether it has outlived its time (e.g. Legge, 1995, 2005; Bradford and Burke, 2006). It was thought that the OD community should have changed their label since the term OD had gone out of fashion, and that this should have also been accompanied by updating traditional OD thinking (Porras and Bradford, 2004). The primary criticisms of OD were that it lacked definition; having single / multiple interventions over time made measurement and evaluation difficult; and internal validity was difficult, in relation to the extent to which the intervention created change, or there was another factor of influence (Palmer et al., 2006: 192). External validity was also difficult; the extent to which OD techniques were suitable to all settings was questionable; there was a problem with generalising on the application of OD in different settings; and there was a lack of theory, with no thorough

account of the theory of change (Palmer et al., 2006). It did not seem an appropriate single method for such a pluralistic field of practice, but Svyantek et al. (1992) proposed a *Bayesian* approach as the solution to the evaluation of OD interventions.

Additionally, critiques have highlighted the lack of clarity on cost / benefit analysis and contribution to organisation performance. There were also deficiencies in distinctiveness or definition and a need for more quality control of practitioners. Moreover, critiques have also highlighted the lack of concern for customers' needs and insufficient business acumen (amongst OD practitioners) (Wirtenberg, et al., 2004). Some OD campaigners sought clarification of the field or identified a need to reshape the field, whilst others believed that there was a lack of interest in OD from students of business, and from executives. It was believed that OD no longer had relevance and that its practitioners were woefully inadequate across the range of business knowledge and skills (Palmer et al., 2006). Additionally, OD practitioners were often considered to be naïve in devaluing organisational politics (Bradford and Burke, 2006).

One weakness of OD was that it did not always face up to the harsh realities of change, for example the need to speed up the unfreezing process through unpleasant means (Senior and Swailes, 2010). OD did not sufficiently adopt the perspective of the general manager: it needed to be far more cognisant of the context and adopt stronger situational perspectives and practice (Beer and Walton 1987). Given that over recent decades many organisational change initiatives have involved downsizing, it was rare to find references to this form of change in OD publications (e.g. Legatski, II, 1998).

OD was also highlighted as being limited when the change situation was constrained: for example, if the need for change has been created by a legal, regulatory or financial crisis issue which means that the design of the change is not completely open (Senior and Swailes, 2010). It has also been criticised as not being strategic in approach (e.g. Worren et al., 1999). It has '*failed glaringly in developing*



*models, approaches, and strategies for gaining power in organizations'* (Beer, 1976: 47).

Additionally, OD requires '*out of the ordinary*' leadership (Senior and Swailes, 2010: 356). Few leaders have the persistence or personality to stick with involving others to achieve long term change, especially when under pressure within the organisational cultural context or dealing with the tension of competing goals. It takes persistence to achieve '*frame-breaking change*' (Senior and Swailes, 2010: 357). In addition, OD fits uneasily with the structures and culture of the public sector, due to the bureaucratic nature of the organisational environment not being best suited to OD. The public sector involves multiple decision makers, and system wide effort is very difficult, with decision making tending to be driven upwards (Senior and Swailes, 2010).

Whilst OD tools and techniques have been favoured for teaching in universities, there is a need for more use of theory and alternative methods of change should be taught, since no one approach is the answer (Dawson, 2003). When people have been on the receiving end of ill designed tools and techniques, and in particular where there have been a series of these, they become cynical and jaded (King and Anderson, 2002). With tools applied badly, it was not surprising that OD was seen as being faddish (King and Anderson, 2002).

However, there is a view in defence of OD (see French and Bell, 1999: 291), that it allows the organisation '*...to go beyond the negative face of power and politics*' (French and Bell, 1999: 291). However, to operate in a political environment OD needs to have: '*Competence ... Political Access and sensitivity ... Sponsorship ... Stature and credibility ... Resource management ...*' and '*... Group support ...*' (Cheung-Judge and Holbeche, 2011: 176 - 177). Nonetheless, issues around the nature of the relationship between OD practitioners and their pay master should not be ignored, as this could lead them to be tempted as '*servants of power*' (Golembiewski, 1989: 178) and OD practitioners who are '*simply mouthpieces for the establishments who pay their fees, which can be substantial*' (Golembiewski,

1989: 43). There were specific condemnations, including issues of power, marked out against planned change itself. The main criticisms made were that:

1. Planned change was suitable in an era where organisations were more stable. With turbulent change in the environment, change has become open ended and continuous rather than one discreet move from one steady state to another
2. It was focussed on incremental change and did not offer anything for transformational / radical change. However there is a range of change requirements from transformation to fine tuning, so not all change is radical either.
3. Planned change is based on the assumption that agreement between all parties can be arrived at, and that all stakeholders are devoid of personal interest (or at least not driven by that) and will happily engage in the planned changes with one common spirit. The assumption is that if there is power and politics at play, differences can be easily identified and resolved.
4. The assumption of one approach: suitable in all eras, to all types of organisations, in all situations.

(Burnes, 2004a)

Advocates of OD contend that it has developed as a profession, and has integrated the need for approaches to organisational transformation, power and politics (Burnes, 2004a). In any case, in Lewin's original version of OD, the importance of politics and power was not disregarded and it was recognised that change could be extreme and swift (Burnes, 2004a), and in particular, *'Lewin did not see organisations as stable and changeless entities'*, with his views being similar on this point to many of his critics. Neither did Lewin consider planned change to be the only approach. It was instead the variants which had emerged from Lewinian roots that were being criticised. As such, to apply the ownership of *Lewin* to the work under critique was incorrect (Burnes, 2004a). Lewin would *'be astonished at the widespread and creative ways his model has been (socially) reconstructed'* (Bartunek and Woodman, 2013).

#### 2.4.8 Debates on the Value of OD, Contemporary OD and the Prognosis for its Future

Although the debate on the ongoing relevance of OD has already been touched on in this chapter, it is a critical issue requiring more detailed analysis. In the UK, in 1995 and 2005 Legge claimed that OD was past its heyday of the 1960s. Later, in the mid-2000s, there was significant debate amongst USA based academics and practitioners on whether OD was dead, or simply having a '*midlife crisis*' (Cheung-Judge and Holbeche, 2011: 23). Burnes and Cooke (2012: 1396) also reflected the energy given to the debate about '*whether or not*' OD was still alive and kicking. In 2004 a Special Issue of arguably the most prominent OD academic journal, the USA based *Journal of Applied Behavioural Science* focussed entirely on reflecting on the '*relevance and continued viability of OD*', in which Bradford and Burke (2004: 369) posed the question '*Is OD in Crisis?*'

In 2006, US based Bradford and Burke pessimistically reflected Legge's (1995, 2005) rhetoric and asked if OD was past its prime and if it was, should it simply be allowed to die a graceful death? There was question as to whether OD was being kept going by periodic transfusions of a new approach that rejuvenated the field for a short time, only to then to relapse into a semi-comatose state (Bradford and Burke, 2006). Greiner and Cummings (2004: 374) headlined '*Wanted: OD More Alive Than Dead*'. However, they outlined a route to a more fruitful future for OD through embracing content as much as process. Another view was that OD was instead already very healthy and was very much needed, given that organisations had to constantly change to adapt to rapidly changing environments (Dunn, 2009).

Worren et al. (1999: 274) were amongst those that levelled criticism that OD practitioners '*do not understand business*' and that '*the field is invisible to the majority of executives*'. Whilst in the founding of BPR, the people element was forgotten, so it could be said that the OD community '*forgot about markets, strategies and computers*' (Worren et al. (1999: 284).

The normally accepted history of OD was that it began in the 1950s, nor was it in a terminal decline by the 1980s. However, there is an alternative view that the history of OD went back longer and is far from obsolete (Burnes and Cooke, 2012). Moreover, this view proposes that there was fight left in the OD community, and *'although there was a great deal of soul searching in the OD community, this was accompanied by an intellectual renaissance, which created the conditions for OD to reunite its academic and practitioner wings and rebuff its critics'* (Burnes and Cooke, 2012: 1397).

There were three empirical studies on the nature of the difficulties faced by OD and the opportunities to overcome perceived problem areas. In 2003, Cummings and Feyerherm reported on the opinions of 21 OD *thought leaders* on overcoming the challenges faced by OD. In this study they looked at features which had created success in the past; what the OD community needed to do more and less of; and what they should have aimed for in the future. They found that the top three reasons given by the thought leaders for past success were:

- Broad education and training, experience (48%); their interpersonal skills (43%); and having an accurate knowledge of self (33%).

When reflecting on what those in OD needed to do more or less of, the top responses were:

- Relying less on techniques and fads (48%); increasing collaboration within the field (43%); selecting context relevant approaches to change (43%); and addressing group and individual development (43%).

Finally with regards to future competencies the following were the areas most referred to:

- Competence in understanding and working with large systems (43%); being able to challenge and say give the tough messages to senior managers (28%); competence in design (24%); able to exert influence and power (24%); commercial acumen (24%); to have a broad understanding of the world (24%); and systems thinking (24%).

In a survey of 1201 respondents of self-identified OD practitioners Shull et al. (2013) compared results with an earlier 1995 study. The 1995 study found that OD practitioners should have focussed on business related and system issues rather than on the traditional territory of '*interpersonal, group process and human relations*' (Church and Burke, 1995: 11). There was a need for OD professionals to be more '*self-aware of their own behaviour and internal states*' (Church and Burke, 1995: 19), the importance of OD values was on the wane, and this trend would continue (Church and Burke, 1995).

Any conclusions drawn from the later study reported by Shull et al. (2013) are arguably limited by the method (for example the use of self-identifying participants) used for issuing the questionnaire. Nevertheless, the results gave a broad indication of where the USA OD community saw themselves in terms of their professional association membership (Shull et al., 2013). The findings, when compared with the 1995 study, highlight a perceived weakening in the professional values and grounding in social sciences, particularly amongst newer members of the field; an increasing focus on business effectiveness outcomes: less of a touchy feely orientation (see Sharkey, 2009); and an increased importance of challenging misuse of power within organisations (Shull et al., 2013). Further findings were concerned with a growing commitment (from OD practitioners) to their employing organisation, the view that coaching was integral to OD and that there was generally optimism about the future of OD (Shull et al., 2013).

In comparing the results, Shull et al. (2013) notes a transition from *Old Guard* to the *New Practitioner* from the 1995 study, and a subsequent transition to the *2012 Practitioner*. The results from these studies appear to be less geared towards strategic level competency than those outlined from the Cummings and Feyerherm (2003) study of *thought leaders* outlined above. In reviewing the future of strategic human resources, as opposed to traditional HRM, Becker and Huselid (2006) appear to find views closer to those given by the OD *thought leaders*, in explaining a new emphasis on the link to organisational performance, rather than individual performance; and at systems rather than individual HRM practice level. Also in line

with the OD *thought leaders* they argue that Strategic Human Resources (SHR) needed to be differentiated in line with the organisational context.

Sharkey (2009) outline three areas of importance in the future of organisations, all requiring OD skills. First, HR and OD should move from a business partner role into driving business strategy through shaping culture and leadership: the rhetoric of business partner and seeking a '*seat at the table*' was history (Sharkey, 2009: 16). Second, they highlight the importance of the need to have talented leaders who can operate successfully in a global economy, and understand how important their behaviour is in driving culture. Finally, having the best of top talent is critical to company performance Sharkey (2009).

OD must first address the following three problems in order to remain relevant: It must put more O in OD; be less exclusive on the emphasis of human processes; and remedy the harm of having adhered so dogmatically to humanistic values (Bradford and Burke, 2006). With regards to the first problem, very few people who have labelled themselves as OD are true OD people, as working effectively in OD means working at a system wide, strategic level. It is not just a case of applying OD techniques to clear up the mess, nor is it simply about changing individuals, for example through executive coaching (Bradford and Burke, 2006). To be effective, change needs to be system wide and it therefore follows that OD practitioners cannot operate without a thorough knowledge of the business. Nor can they operate in a socio-technical change context whilst ignoring the technical aspect issues due to it being outside the core competence of OD (Bradford and Burke, 2006).

To combat the second problem area, OD practitioners must fully understand the problem or opportunity. This is not always, or exclusively, about the way people interact and the setting of ground rules for interactions (Bradford and Burke, 2006). If OD practitioners always resort to a default setting of *it is the norms of behaviour that need addressing, or we need to revisit the mission and objectives so that we are*

*all agreed on the objectives*, then credibility will be quickly lost (Bradford and Burke, 2006).

With the third problem area, whilst democratic values had been a strength and underpinned achievements for OD, a dictatorial emphasis on them can be harmful. Research has found that commitment can be developed without employee participation in the decision-making processes. However, when challenged, OD practitioners often seem to let the humanistic values predominate over behavioural science research findings (Bradford and Burke, 2006). Furthermore, there is a paradox in that OD practitioners have strongly advocated and imposed humanistic values, when in taking what was in effect a dictatorial approach to this they were themselves being anti-democratic! Within the OD population there has been too strong an emphasis on the client as the enemy, with a strong anti-leadership streak running through much of the OD community (Bradford and Burke, 2006). Moreover, OD has had an unexplored dark side in that it has not been open to objective evaluation (Bradford and Burke, 2006).

Every organisation has a history which means that some approaches may be inappropriate for that organisation (Bradford and Burke, 2006). So, for example, in an organisation that had previously used TQM, if it was used to manipulate the outcome of goals, then TQM might thereafter be perceived as negatively (as a tainted process) by some stakeholders. In this case, assuming that TQM could be applied afresh and received without prejudice could be foolish. There may be sacrosanct positions which must be considered or change will not happen. There may be individuals who have more or less power than an organisational position chart suggests; some individuals who must be included; others for whom inclusion does not matter; and those who influence others (Bradford and Burke, 2006).

Several scholars have explored the trials and tribulations of OD and between them presented a disparate range of advice on where opportunities lie. Woodman (1989: 206) published a review article that examines developments, offering the following areas for examination: *'refinement of change theories, developments in research*

*methodologies, developments at the level of firm strategy, OD in multinational firms, development of the organizational culture construct, development of high performance, high-commitment work systems, and OD in social movements’.*

A more recent school of thought has been emerging since the early 2000s. Under the label of *Positive Organisational Scholarship*, along with fields like AI and *Positive Psychology*, it promotes that the focus of OD should not have been dominated by negative issues and addressing problems only, but should also focus on building on strengths (Palmer et al., 2006). However, any agreement on what was positive should not have been assumed, nor should behaviour have been judged, in that *correct* behaviour was a situational issue (Palmer et al., 2006). Furthermore, if positive and negative aspects could have been separated, they were just flip sides of the same coin and change for the positive could come out of experience of adversity. Besides, a criticism of mass positivity was that it assumed a unitarist perspective (Palmer et al., 2006).

OD is still in its adolescence, searching for its identity and uniqueness, and is still relevant. However, there are many areas where it needs to do better: in particular maintaining integrity while demonstrating capability of dealing with commercial concerns (Cheung-Judge and Holbeche, 2011). It would be useful for OD to revisit its identity and boundary, identifying the core of OD that should be preserved whilst other parts evolve (Cheung-Judge and Holbeche, 2011). In a global environment where complex and ongoing changes are normal, OD is at a defining moment in its history, with OD skills in higher demand than ever (Gallos, 2006). They are rarely identified as valuable and necessary, though ascending:

*‘... fully to this challenge, however, takes the field towards new theories, practices, markets and applications. Doing this well requires (1) differentiating OD’s core from its peripheral trappings and (2) creating a proactive strategy for identifying possibilities for OD’s future’*

(Gallos 2006: 829).

There may be a positive prognosis for the future of OD. There is still an important role to release *‘human potential within organisations’*, indeed at a time when the



lack of moral rigour had presented us with various business catastrophes, a community that has held on to its values when they were considered out of date, should have something to offer (Bradford and Burke, 2004: 372). However, in order to survive, OD needs to express more clearly *'what it is and what it is not'* (Bradford and Burke, 2004: 372).

Furthermore OD needs to identify itself as a profession which has *'clear boundaries that define the field, rules that govern entrance, a code of ethics, and a way of disciplining members who violate those ethics'* and at the moment, OD has none of this (Bradford and Burke, 2004: 372). In the UK, though, if OD is to be considered to be within HR, it does have all of these features under the umbrella of the CIPD.

Additionally, OD can achieve a better understanding of itself as a field, through looking at its practice as developed in the *Strategy as Practice* academic community (Hutton and Liefoghe, 2011). There is an argument *'for a concept of unity of theory and practice that places primacy on practice and in which OD as a pragmatic reconstruction draws on the multiple perspectives of participant, observer, and critic'* (Hutton and Liefoghe, 2011: 92). In the founding of OD, this process was applied (Hutton and Liefoghe, 2011).

A major strength of OD is that its processes were essentially well founded, but its future will depend upon numerous connected circumstances (French and Bell, 1999). In the main conditions are favourable to OD, but there are ambiguities and countertrends that require attention: *'... The conditions and contingencies have to do with leadership and values; diffusion of technique; integrative practice; mergers, acquisitions, and alliances; rediscovering and recording history; and the search for community'* (French and Bell, 1999: 324).

Amongst the ideas for improving OD are that the design sciences were brought to OD and Change Management to see what could be learned from them, and there are examples of academics who have successfully used design science in disciplines such as engineering, architecture and medicine (Bate, 2007). Design science is suitable for use in OD since it sits *'within a discipline aimed at developing general*

*substantive and procedural design science to solve to solve the field problems of that discipline'* (Van Aken, 2007:71).

French and Bell (1999: 323) argue that *'The future of OD is bright as long as the high-quality, hard work of the past continues, and providing it does not become fashionable for top leaders to revert to autocratic or capricious practices in times of high turbulence or crises.'* There are some CEOs, Finance, and HR leads who are committed to dual objectives of organisation performance and humanistic values, whether they are correlated or not (French and Bell, 1999). In the USA some CEOs are committed to this duality, whilst others are only interested in the bottom line (French and Bell, 1999). However, there is unfinished business in OD and in particular change efforts have failed, so the OD community has to continue to search for innovative solutions that work (Burke, 2011). Furthermore, whilst OD has been adept at *'tightening loose systems'*, it has to become equally skilled in loosening tight systems. (Burke, 2011: 163).

The barriers that OD needs to overcome to be successful in the future (Bradford and Burke, 2006) are that: it must be able to reinvent itself; practitioners must develop new competencies (e.g. commercial acumen and knowledge of business components); OD consultants should be capable of evaluating which needs are crucial in any situation (i.e. improvements in the human process, or business improvements); and OD practitioners should consider that not only have they lost their values, but must equally address that they had lost their relevance (Bradford and Burke, 2006). There is also a need to critically revisit the supporting system for OD practice, through books, articles and networks, as there is a requirement for strong leadership in the development of the profession, or in the evolution / revolution that will make that happen in the future (Bradford and Burke, 2006).

On the question of the existence of revolution or evolution in OD (e.g. Mirvis, 2006), an evolution generates fresh content which produces quantitative change, whereas revolution *'involves a change in context'* that is more fundamental and has more significant impact (Mirvis, 2006: 48). OD is undergoing both, in particular

where stakeholders take on new roles, for example, from clients to co-creators (Mirvis, 2006). OD initiatives have been designed around getting the whole system in the room, through using the open space format, and there has also been new theory, complex adaptive systems, new processes and the move towards using positive perspectives and action (Mirvis, 2006). OD has a role in creating a new purpose, which is a better world (Mirvis, 2006).

Many academics argue that a primary issue facing OD is in the lack of academic theory, rigour and research. Pettigrew (1985) describes how OD was considered as a fad, preoccupied with the people perspective of organisations to the exclusion of other factors, and not sufficiently informed by rigorous research. OD must be ‘... *driven by the twin forces of academic rigour and practical relevance*’ (Burnes and Cooke, 2012: 1414). In the 1970s and 1980s, practitioners developed approaches to change by responding to client needs. Since the 1990s academics have been shaping the way forward ‘*as they seek to develop theoretically strong and rigorous approaches to change*’ (Burnes and Cooke, 2012: 1414). The call for better research and theory was also made by Beer and Walton (1987) who advocated a longitudinal approach, returning to action research, but over a much longer time frame; and Cummings and Feyerherm’s (2003: 107) conclusion on the future was that ‘*the field of OD will continue to rely on a theory of change and research*’.

A shared research agenda is key to OD’s ‘*scholarly development*’ (Cummings and Feyerherm (2003: 107) with a need to bridge the research gap between academics and practitioners (Bunker et al. (2004). Bunker et al. (2004) suggested that areas which came from social and organisational psychology were ripe for the application of research, including virtual teams; conflict resolution through mediation and negotiation; work group effectiveness (in terms of effective output rather than measured by improved process and interpersonal relationships); and analysis of social networks. These are more fitting for practical application than the other areas of intractable conflict and trust (Bunker et al., 2004). OD needs to have more coherent links between theory, research and practice. This is not concerned with whether the research methodology used is quantitative or qualitative, but that the

standard of the research has been questionable and some has been of poor quality (Woodman, 1989).

OD needs to earn credibility through evaluating the effectiveness of the models deployed (Francis et al., 2012). This sentiment is not new, with Beer commenting in 1976 (1976: 50) that *'OD suffers from an inability to demonstrate the relevance of its interventions' ... 'Developing a method for measuring ... can not only increase the effectiveness and professional responsibility of OD but it can increase the power of OD within organizations.'* Beer (1976) also called for robust theories and archetypes to increase the power and influence of OD.

Additionally, whilst there is much rhetoric on the failure of change, there is little valid and reliable evidence on which to base judgement of the reason for failures (Burnes and Cooke, 2012). Lack of consistency in study methods between *'types of OD'*, and differences in methodologies and organisational contexts, makes comparison difficult (Burnes and Cooke, 2012: 1415). Conclusions could be over generalised and lead to invalid suppositions. For academics and practitioners to work on the scale and over the time span necessary to be able to make more generalisable claims is a vast endeavour (Burnes and Cooke, 2012).

Not only did Hutton and Liefoghe (2011) emphasise that there was much that was right in the early field of OD, but in a stronger vein, Burnes and Cooke (2012) advised that it was crucial to pay attention to OD's Lewinian roots in order to add to its rigour. Despite the four common criticisms of Lewin, his approach was neither simplistic nor outmoded (Burnes, 2006). The appropriateness of emergent change faded, with complexity theory proving to be more fitting (Burnes and Cooke, 2012). The importance of values and ethics which had been considered old fashioned, were restored to vibrant life following the *'various organisational and financial scandals of the past decade ...'* (Burnes and Cooke, 2012: 1415) with the consequence that OD values became relevant again.

There are *'two fundamental issues that OD needs to address ...'* the first is *'rigour and relevance'* ... *'What is needed is a genuine commitment by both academics and*

*practitioners to restoring Lewinian rigour and relevance to OD* (Burnes and Cooke, 2012: 1415). The second issue is the willingness and ability of OD to address the most significant questions facing global society (Burnes and Cooke, 2012: 1415).

Organisational effectiveness (OE) has been put forward as the vehicle for future OD success: new *'OE is eclectic since it involves practitioners' embracing humanist and business values'*. Moreover, in seeking to *'build healthy and effective organisations characterised by learning, innovation, improvement and self-renewal ...'* as well as building *'sustainable high performance through people'* it meets the goals of OD and HR (Francis et al., 2012: 336) and HR's role should be central in fuelling this shift.

The compelling motivation for the founders of the discipline was to improve the human condition and to wipe out totalitarianism. It could be argued that OD narrowed its driving goal to be that of achieving organisational effectiveness, which opens it to criticism of being *'merely a vehicle for managerialist co-optation'* (Burnes and Cooke, 2012: 1416). In the current global, economic, environmental and ethical context the *'big questions'* have never been so important (Burnes and Cooke, 2012: 1416).

Only leaders and organisations with a strong moral compass are likely to be able to resist the siren call of short-term expediency in order to promote long term sustainability. People have a choice to behave ethically or otherwise; they cannot be manipulated or tricked into it (Burnes and Cooke (2012). To achieve an embedded long term approach to change, OD approaches are required and OD should lead the move to a more sustainable and ethical way forward (Burnes and Cooke, 2012).

It should be remembered that one circumstance of Lewin as a founder of OD was that he *'lost many of his family in the holocaust'* (Burnes and Cooke, 2012: 1416). In this context, his powerful motivation to resolve social conflict, extend democracy and root out totalitarianism was simple to understand. In contemporary OD the challenges may be different, *'but the need to promote ethics and democracy in*

*order to build a better, more sustainable, world remains'* (Burnes and Cooke, 2012: 1416).

## Summary of Key Themes

The review has revealed that there are several key themes which take priority of focus in the literature on OD:

1. One of the strongest themes is that of the difficulty of definition and the fuzzy boundaries of OD.
2. Much has been written on the history of OD and on its founding years, on these topics discrepancies were, in the main, minor. However, one key difference is in the challenge to the perspective of the sole US influence in OD's founding. A further issue is the continuing domination of influence on OD by US based scholars, in terms of what is written with regards to OD.
3. In terms of core OD, the traditional approach to OD has been outlined, with information on how this original form of OD has evolved. However, there is also variation from this traditional form of OD in terms of what else has been described by the scholars.
4. Although the majority of accounts of the practices, skills and competence required to be an OD practitioner emanate from US based scholars, the CIPD also provides information on this in their professional model map. There is much discussion on, and general agreement that OD practitioners should be capable of challenging organisational orthodoxy.
5. The relationship of OD to *Change Management* is blurred and there is variation on views as to how they fit with each other.
6. In the main, in the literature, there seems to be an assumption that OD is provided through a *Consultancy Orientation*.

7. OD as an application of *Behavioural Science* is still prevalent in the literature.

However the need to have *Behavioural Science knowledge and skills* is less prominent. In addition, there is not much provision in the way of formal OD education in *Behavioural Science* in the UK.

8. *Organisational Effectiveness* has been a goal of OD from its early years, and the emphasis placed on effectiveness has recently become stronger.

9. A *Strategic Approach* was less prevalent in early OD, but has also become a strong focus for contemporary OD.

10. There is little in the way of acknowledgement of the national, social or organisational context of OD practice from academic authors.

11. OD's relationship to HR and HRD has been almost ignored by the US based scholars, and where it has received attention it has been primarily from UK based authors.

12. The extent to which OD has, or should, follow a professional regulation route is debated.

13. The requirement to adhere to traditional OD values and ethics is a prominent feature within the scholarly community. However, there is debate on the extent to which OD should prioritise business concerns over adopting these values.

14. Critiques of OD are a focus for scholars, and a pool of US based scholars have questioned whether the OD profession will survive. They have reflected on what OD must do to flourish in practice and in academia.

15. A tendency has emerged towards a divorce / separation between academia and practice. The lack of rigorous research to underpin OD practice has been identified as an issue.

These main themes from this chapter will be revisited and used to shape the structure of the discussion in Chapter 7.

In consideration of the main areas of consensus in literature, the author has developed the following definition of OD: '***OD involves planned change (at whole or sub) system level, with the goal of organisational effectiveness achieved through the application of OD - processes, tools and techniques and delivered by adhering to humanistic values***'. The author's definition includes *planned change*, since there continues to be consensus from the scholars that change in OD is specifically *planned change*. The level of system change has been clarified by the author as being at both system and sub system level, since both are evidently important from the academic presentation of OD. *Organisational effectiveness* and *processes, tools and techniques* have been and remain within the remit of OD, and the scholars continue to place emphasis on *humanistic values*.

As we have seen then, much of the literature on OD is prescriptive in tone and at least in part, there are unfounded assumptions about the nature of OD practice. It is to an exploration of that practice that we now turn. This will be followed by the consideration of how we might know about that practice (through outlining the methods applied in this research study) supplied in the next chapter.



## Chapter 4. Methods Applied in this Study

This chapter will outline the research aims, research questions and research strategy. It will summarise the context of the ontological position adopted, ensuring transparency of purpose and position. It will also outline the context for, and protocols followed in, selecting and applying the three methods of data collection. It will show how the content analysis, bibliometric search and subject expert interviews cumulatively contribute to the identification of trends and influences in the development of OD in the UK from 1970 to 2010. The metaphor of the qualitative researcher as a '*bricoleur, ... a maker of quilts*' (Denzin and Lincoln, 2003: 5) is an appropriate way of conceptualising how the three methods are woven together in discussing the results, enabling the identification of the history and patterns which emerge in the development of the field of OD. Finally ethical considerations and limitations will be clarified.

### Research Aims, Questions and Strategy

The broad aims of this research are to understand the development of the OD profession in the UK over four decades (1970 – 2010) in order to identify how it has developed, what changes have taken place in the profession, and what and who has influenced this change. The study focuses on the perspectives of the academic community and the OD practice community, with the views of lead influencers also being considered. Data will be analysed through the application of Institutional Theory, with a particular focus on its conceptualisations of professions, the Diffusion of Ideas, and Fashions and Fads in Management. With these broad aims in mind, over time, the researcher's thinking was iteratively refined, leading to the evolution of a more focussed aim and research questions.

### 3.1.1 Research Aim

This research aims to examine whether there was a difference between academics' and practitioners' views of the UK OD profession through empirical study, and to apply theoretical perspectives through which to understand the forces of influence at work in the development of the profession in the UK.

### 3.1.2 Research Questions

The research questions set out in the introduction (chapter 1) are noted here for reference:

1. To what extent is there a difference between the academic literature and practitioners' perspective of the development of the OD profession in the UK?
2. What does the empirical data of this study evidence on the development of the OD profession in the UK in respect of its form, magnitude and perceived importance?
3. What are the forces at work which influence the development of the OD profession in the UK?

### 3.1.3 Research Strategy

Fundamental to the selection of an appropriate research strategy for this study was the idea that '*... organization behaviour occurs within a web of socially constructed ... prescriptions of appropriate conduct*' rather than in a '*calculated and rational manner*' (Greenwood and Suddaby, 2006: 28). The research methods design was informed by the need to understand the trends and developments in the practice of OD in the UK over the forty year period between 1970 and 2010. To accomplish this, three methods were employed.

First, data was collected on the number and content of OD roles, using content analysis to analyse a sample of job advertisements from 1970 to 2010. Second, in order to identify trends in what was being written about the nature of the OD profession during this period, a bibliometric search was undertaken to identify

when and where OD was a subject focus for publication, and who the key writers on OD were. The findings from the content analysis and the bibliometric search are contained within Chapter 5. Third, in order to gain a richer understanding of how the OD profession is perceived, semi-structured interviews were conducted with subject experts from the academic, practice and lead influencer communities. These interviews focussed on gaining an understanding of interviewees' perception of developments in the profession over time, and their view of contemporary OD. The findings from the interviews are presented in Chapter 6. All the data collected is compared, and analysed through the lenses of Institutional Theory (in particular on the nature of professions), and the Diffusion of Ideas and Fashions and Fads in Management. This facilitates an understanding of the drivers for the development of OD, and the identification of those who have led change in the characteristics of the profession. Discussion of this is presented in Chapter 7.

Previous studies on the development of professions within Institutional Theory used archive data, supplemented by interviews (see Greenwood et al., 2002; Greenwood and Suddaby, 2006). The methods used in this research are in line with methods applied in the application of Institutional Theory to investigate innovation in management practices, with semi-structured interviews and search of newspaper database using keywords as methods (Boxenbaum and Battilana, 2005).

## **Transparency and Consistency of Position**

This section explores the options for philosophical choice, and explains the critical realist stance adopted, as well as the researcher's value set. With data in narrative form from the content analysis and interviews, it is important to consider that language is subject to social interpretation and as such, the use and analysis of language is also discussed.

### 3.2.1 The Philosophical Options Described by the Scholars

Social science and management scholars address the issue of placing research within a philosophical context (Alvesson and Deetz, 2000; Bryman and Bell, 2007; Burrell and Morgan, 1979, Denzin and Lincoln, 2003; Saunders, et al., 2007). Some consider this to be an essential primary consideration (Guba and Lincoln, 1994; Saunders, et al., 2007); Bryman and Bell (2007) acknowledge that it is a complex issue; and others point out that misleading assumptions can be made (Alvesson and Deetz, 2000). In this study, this philosophical alignment included ensuring consistency between the subject of study and the selection of the theoretical lens as outlined in the chapter 2.

Although epistemology, ontology and methodological preferences are separate issues, they are generally linked and often tabulated. Guba and Lincoln, in Denzin and Lincoln (1994) and Rousseau et al. (2008) highlight that, in practice, the general rule is that there should be a broad alignment between positivism, an objective ontological position and a quantitative methods approach. Similarly there should also be a broad alignment between interpretivism / constructivism, subjectivism / constructionism and a qualitative methodological approach.

This study therefore observes the advice of Mutch et al. (2006: 608), who highlights the need '*for theoretical consistency across levels of analysis*'. Bryman and Bell (2011: 17) explain that '*... critical realists recognize that there is a distinction between the objects that are the focus of their enquiries and the terms they use to describe, account for, and understand them.*' In terms of the consistency in this research study, Critical Realism aids with engaging with the world to develop a richer understanding of the phenomenon:

1. Because it gives a sense of a (social) world distinct from (although related to) the understandings of those involved in it. That is, it is neither a simple *reality* that can be measured or just a set of stories – there is something to be investigated and
2. Because it validates and supports a mixed methods approach.

Furthermore, a Critical Realist approach ‘asserts that the study of the social world should be concerned with the identification of the structures that generate the world’ (Bryman and Bell, 2011: 713). Proposing a dualist epistemology, Fairclough (2005) argued the case for Critical Realism. He put forward the view that critical realists ‘assume a stratified ontology, which sees different strata of social reality with different properties. A distinction is drawn between the “real”, the “actual”, and the “empirical”’ (Fairclough, 2005: 922). With three different methods applied in this study, an attempt has been made to complement a stratified ontological position. Bhaskar (1975) delineates the domains of the *real*, the *actual* and the *empirical* in terms of mechanisms, events and experiences (see Table 4.1).

	<i>Domain of Real</i>	<i>Domain of Actual</i>	<i>Domain of Empirical</i>
<i>Mechanisms</i>	✓		
<i>Events</i>	✓	✓	
<i>Experiences</i>	✓	✓	✓

Table 4.1 Bhaskar’s Domains of the Real (Adapted from Bhaskar, 1975: 13)

The *empirical*, *actual* and *real* in relation to this study are outlined below:

1. OD is more than just what people say about it, although those sayings are important and part of its constructions. That is, there is something more than that which is immediately apparent – the *empirical*.
2. If we want to get at the *actual*, the rich complexity of OD, then we need a variety of sources, hence an approach which draws upon a number of sources. In particular, the historical dimension is significant, because we can see changes and emergence over time, giving us more confidence that we have grasped the essential nature of the phenomenon.
3. The *real*, for Critical Realists, is in the mechanisms that produce the *actual*. These can only be arrived at conceptually. In this study these are potentially professionalisation and fashion.

In reporting on a research strategy, it is appropriate to indicate whether an inductive or deductive approach has been adopted. Either explicitly, or implicitly

through placement on diagrams, the dichotomy between inductive and deductive approaches has often been placed against particular epistemological and ontological positions (Bryman and Bell, 2007, Saunders et al., 2007, Teddlie and Tashakkori, 2009). A deductive research process, in which theory is used to provide a testable hypothesis, is most often aligned with a natural science model. An inductive research process, where the research leads to the generation of theory, is most often placed within the interpretivist epistemological approach. This categorisation should not be oversimplified (Bryman and Bell, 2007) and as the early stages of this study (Gillon, 2011) was exploratory in nature, a primarily inductive approach was used. However, as the results of this phase provided illumination on the subject area, the process became more deductive in nature.

### **3.2.2 The Implications of Critical Realism for Methods Choice**

Critical Realism is consistent with both quantitative and qualitative methods in that it *'allows researchers to be selective in their choice of investigatory tools'* (Ackroyd, 2004: 127). Critical Realism is congruent with the methods selected for this research (Ackroyd, 2004).

In particular, the author is informed by Sayer's presentation of the world (2010: 5-6).

1. Independent of our knowledge of it, the world exists.
2. Knowledge can be empirically checked, even if ideas of falsity and truth do not sufficiently address the *'relationship between knowledge and its object'*. *'... material practice'* can be explained empirically.
3. The development of knowledge is *'... neither wholly continuous ... nor discontinuous'*.
4. Social and natural objects have ways of acting, susceptibilities and causal power.
5. *'The world is differentiated and stratified, consisting ... of events ... objects, including structures, which have powers ... capable of generating events'*.

6. Since social phenomena (e.g. institutions and text) are concept-dependent, we need to understand their meaning rather than simply explain how they are produced. Although interpreted by a researcher, they exist independent of the researcher interpretation.
7. The social relations and conditions in producing knowledge 'influence its content'. Since knowledge is primarily linguistic, therefore we must be aware of the way we communicate and use language.
8. To comprehend social phenomena, we must adopt a critical approach to the object studied.

The view that the research strategy adopted is situated within Critical Realism is '*not a claim to a privileged access to the truth, but*' (is) '*a genuine attempt to formulate better means of understanding*' (Mutch et al. 2006: 611). In terms of objectivity and the search for this understanding, the author's aim is to satisfy the following criteria:

*'Research knowledge is objective to the extent that the researcher says, honestly:*

- *Here are the assumptions I made about the nature of reality and how it can be known about*
- *Here is the question I asked*
- *Here are the methods I used to collect the data relevant to an answer*
- *Here are the data I collected*
- *Here is the way I analysed the data*
- *This is the answer I came up with*
- *I think I'm right, but I've given you enough to check all this to see if you come to the same conclusions'*

Gomm (2004: 19)

### 3.2.3 Researcher Value Set

It is important for a researcher to explicitly state their values, since they are intrinsically linked with the choice of research topic and methodology (Saunders et al. 2007). A key issue in relation to maintaining a critical stance in this research is the researcher's own background as a professional practitioner in the field of OD. As such, it is important to acknowledge and be cautious about the impact of existing understanding and opinion based in anecdotal evidence. As such, the researcher is cognisant that this may impact on her ability to take a critical approach to the thesis topic. However, being a member of the academic community for eight years has enabled the researcher to adopt and maintain a more reflexive and objective approach. Although in the hierarchy of evidence, personal experience sits at the bottom (Buchanan and Bryman, 2007) this personal experience, competence and preferences are likely to influence research. This is no bad thing, as personal experience, competence and preferences could be '*critical to designing and sustaining interesting organizational research*' (Buchanan and Bryman 2007: 495).

### 3.2.4 Language

This study included the collection and analysis of written data from job advertisements and recorded oral data from interviews. As such, it was important to consider if the language used could be assumed to have a fixed objective meaning. Alvesson and Deetz (2000) argue the analysis of language cannot be taken literally. Ludwig Wittgenstein '*has been highly influential in the development of a linguistically based approach to social investigation*' (Williams and May, 1996: 73). Wittgenstein inspired the abandonment of an empiricist approach to language; furthermore his work developed the perspective that '*... linguistic philosophy's starting point was the observation that ordinary language serves a multiplicity of functions; language is a rule guided social activity and the philosophers' task is to examine linguistic customs within particular language communities*' (Halfpenny, 2001: 378). The language of the community of OD practitioners and academics, as it developed between 1970 and 2010, is the focus of this study. Discourse analysis



also informed an understanding of the role of language in this study, as '*It explores how language constructs and simultaneously reproduces and/or changes the social world rather than using it as a means to reveal the social world as a phenomenon.*' (Saunders et al., 2007: 596)

Since knowledge about what constitutes OD and the data collected and analysed in this study is primarily linguistic in character, the researcher must retain awareness that language does not only reveal the world of OD, but has also been used to change the world of OD. Bryman and Bell (2007) suggest that those adopting a Critical Realist epistemology argue that in conducting research the relationship of the social structure context must be part of any discourse analysis. The researcher also noted that '*organizational structures ... have a partly linguistic/semiotic character*' (Fairclough, 2005: 918), and as such, it is important that the researcher retains critical judgement on the context of the written and recorded oral data.

Having outlined aspects of the choices made in the research strategy, more detail will now be presented on each of the three methods adopted.

## Content Analysis

The first method involved content analysis of OD job advertisements from a forty year period, from 1970 to 2010. Analysis of historical documents as a method of study of the change and development in a profession within the context of Institutional Theory has been conducted previously (Suddaby, et al., 2007). Content analysis is a transparent research method suitable for application to mass media material (Bryman & Bell, 2011), and has been used before to understand the developments and evolution in professional job roles (Todd, McKeen, & Gallupe, 1995).

Content analysis is positioned primarily in the quantitative methods tradition, although it can also be used in qualitative methodological approaches (Bryman and Bell, 2007), with Duriau et al. (2009: 5) placing it '*at the intersection of the*

*qualitative and quantitative traditions*'. It involves two levels of analysis: a count of words in the text provides numerical data, and an interpretation of the meaning of words can also be carried out (Duriau et al., 2009). This study examines the numbers of job roles advertised with OD in the title, and counts specific and coded words in the content of the advertisements.

Content analysis can be applied in both inductive and deductive forms of research (Duriau et al., 2009). In addition, it is important to acknowledge that genres exist within different forms of organisational communications, such as job advertisements, and that organisational actors consciously or unconsciously design their placement and content within this social context (Yates and Orlikowski, 1992).

In addition to considering the type of data necessary to answer the research questions, pragmatic consideration was given to access to data, as lack of access can become a stumbling block which can lead to difficulties in completing a study. In this case, the source of information was in the public domain, subject to library membership, and so the researcher was assured of access.

### **3.3.1 Identification of Media**

In the early stages of this study (Gillon, 2011) an effort was made to review a range of media used to attract candidates to job vacancies. The possibility of using online job searching websites sites was explored. However, it was difficult to achieve consistency of approach in the selection of sites as job roles may be advertised on more than one website and the detail provided was highly variable, and at times too vague to be of use. In addition, search engine processes were not helpful as initial searches produced a large volume of irrelevant job roles. As such, the data search focused on offline resources.

Scoping searches were carried out in general newspapers and in the CIPD trade press. Initially media were considered which had a general business audience as well as more specialist media affiliated with HR, in order to give a more balanced perspective. Microfiche back copies of *The Times* newspaper from the 1940s,

containing job advertisements, were consulted at the Mitchell Reference Library in Glasgow. However, ultimately the advertisements in *The Times* newspaper were not useful as there was little in the way of OD or HR jobs advertised in the earlier decades of the 1900s, and by the 1990s and post 2000 the adverts tended to be for CEOs and very senior positions not relevant to this study.

Having discounted the viability of other media sources, the CIPD trade press publication *People Management*, and its predecessors, were selected as the most suitable source. As a trade publication, it is automatically sent to all CIPD members; has good geographical coverage across the UK profession; and has carried job advertisements since 1967. No figures were available for the proportion of HR professionals who were not members of the CIPD, but with 135,000 members the publication has an extensive circulation within the profession (CIPD, 2014d).

### **3.3.2 The Identification of the Population and Sampling Mechanism**

To establish an appropriate sampling mechanism, a multi-stage approach was applied (Saunders et al., 2012). A visit was made to the CIPD library in Wimbledon to carry out a primary scoping exercise. Although not geographically convenient for the researcher, the library carried a complete archive of copies of *People Management* since publishing began, which enabled the full sample population (Saunders et al., 2012) to be identified. Although *People Management* is the current membership publication of the CIPD, a membership publication had existed in some form since 1920, the first of which to contain job advertisements being '*Personnel Management: the magazine for Human Resource Professionals*' in 1967. The notes of the findings from the scoping visit can be found in Appendix 4.1 and Appendix 4.2.

Throughout the period between 1970 and 2010, trends in the number of OD jobs advertised were tracked. The count of job advertisements provided the information required to decide on the sampling frame (Saunders et al., 2012) for the content analysis. It was essential to have a measure of the full population of advertisements in this media since the start of publication of job advertisements 1967, and all

pages in every issue published since 1967 were searched. Prior to incurring the expense of visiting the CIPD library in London to complete the search, other copies of the publication were examined during visits to five libraries in the researcher's home city location.

The search terms for the job roles which would be included in the study were defined as all job advertisements which had *OD*, *Organisation Development* or *Organisational Development* (and the same terms with USA spelling). The count was logged for each month of publication and for the source of the issue used, such as the library it was sourced from.

Prior to 1990, there was a monthly CIPD publication, *IPD Digest* which was not included in the count. Copies of *IPD Digest* were only available from the CIPD library in London, and were stored off site. Given the finding of a smaller number of adverts in the 1970-90 periods, and the expense of sourcing the publication compared to the potential value to the research, it was not thought worthwhile to source these. However, as a result, it is important to note that the pre 1990 and post 1990 advert count numbers cannot be directly compared. In addition, there were other trends which affected the raw number counts such as trends in the use of this publication for recruitment advertising. Therefore data was collected (and presented in chapter 5), in terms of how the volume of advertising changed over the period 1970 - 2010.

The consistency of the count was checked to ensure that no job advertisements had been missed or counted more than once. This was done by counting the number of OD jobs found per issue and year of publication by sector for the period 1995 – 2010, since this was when the greater proportion of job advertisements appeared. The monthly figure was cross checked with the general count of job roles, creating data on the sectoral make up of recruitment to job roles with OD in the title.

In a further audit check a sample of thirty six copies of the CIPD publication across the time period were rechecked, with differences from the original count found in three copies. These errors were adverts that had been missed, rather than

erroneous counting 'in' of adverts. Statistical representation of this error rate would be subject to significant flaw. Nevertheless as a broad representation in terms of numbers of average pages in the thirty six issues recheck, the error rate in terms of advertisements missed is 0.71% or 0.0071 per page. When one considers that most pages had several advertisements per page the error rate becomes less significant by a factor of three or four.

Saunders et al.'s (2012) algorithm on sampling selection was used to establish stratified random sampling as the most fitting method of probability sampling for the content analysis method used in this study. The sampling frame produced a population of 893 job advertisements. There was one exception to the stratification sampling strategy. With only 19 OD roles found up to 1985, all job advertisements from that period were included in the sample. With the application of stratification for all adverts after that first period, to each fifth year since 1990, a total sample of 220 job advertisements was produced. Here, again, statistical representation of this would be subject to flaw, but in order to provide a measure of the level of confidence applied (population 893, sample 220), a 1000 population requires a sample of 278 to be at a confidence level of 5%. The sample selected was then reviewed by using content analysis, a technique appropriate to the analysis of media documents (Bryman and Bell, 2007; Gomm, 2004).

### **3.3.3 The Coding of Content Process**

In applying a content analysis approach, the authenticity, credibility and representativeness of the sources must be considered (Bryman and Bell, (2007). Given the purpose of job advertisements in a professional membership publication, the source data was likely to be authentic and credible, and the sampling method was selected in consideration of representativeness.

A coding scheme was used in the early stages of the study (Gillon, 2011), and set up to develop the primary codes required for the content analysis dictionary (Bell and Bryman, 2007), by carrying out an initial coding exercise with five job roles.

However, the coding group terms were further developed and words and phrases added when applying the coding to the full set of advertisements (Gomm, 2004). A coding manual was developed, with a record of how each individual word or group of words was to be coded (Bell and Bryman, 2011). With a single researcher applying the codes, there was no issue with inter-coder reliability (Bryman and Bell, 2011). The coding dictionary developed from the earlier exercise (Gillon, 2011) was used as starting point for this research and development of the coding terms continued.

To ensure intra-code reliability, exact words and phrases were recorded in the coding dictionary in the early stages of the study and applied in a single exercise with no time delay. Application within a single time frame was not possible with the larger data set used in the main study, as by the time of coding the data for this study, the coding dictionary was already in the near final version. There were words within the coding dictionary which were considered to be within the meaning of a particular code as a result of the context in which they arose within a sentence. For example, where the words *Change*, *Change Management*, *Strategic Change*, *Vision*, *Change Programme*, *New Direction*, *Future*, *Transform/ational* appeared in an advertisement, these words were coded as 'Change Management'.

Since the advertisements varied significantly in length, the recurrence of words aligned to one theme may be less likely to be as a result of weighting of importance and more as a result of the total numbers of words in the advertisement. As such, a theme appearing within a particular advertisement was counted only once. For example, if *change* and *transform* both appeared these would be counted only once as 'Change Management'. The reason for selecting this protocol was that a word such as *Leadership* (or one of the other words coded as *Leadership*) could appear in one advert once, and five times in another, suggesting that *Leadership* was more important in the second advert. However, if the second advert was five times as long as the first, then it would seem erroneous to say that *Leadership* was more important in the second advertisement.

The final coding dictionary applied to job role content, skills and experience cited in the advertisements was comprised of the following thirteen code groupings: *'Change Management'*, *'Consultancy Orientation'*, *'Cultural Issues'*, *'HR'*, *'Learning and Development'*, *'OD'*, *'Effectiveness'*, *'Organisational Learning Orientation'*, *'Partnership Issues'*, *'Strategic Approach'*, *'Leadership'*, *'Organisation Wide Perspective'* and *'Interpersonal Skills'*. The left hand column of the coding dictionary includes a complete list of terms in the coding count. Another researcher may have developed a different coding dictionary, but the development process for the application of the coding dictionary, shown in Appendix 4.3, is transparent and replicable.

## Bibliometric search

A bibliometric search was also conducted to establish the field of writing on OD, with a view to then understanding the influence and impact of that work on developments within the profession. A bibliometric method can be defined as *'use of statistical methods to analyze how materials are utilized in published work and research to show the influence of particular work and ideas'* (Hart, 2001: 187). For the purposes of this study it was crucial to identify the primary published authors, and their base countries.

In this main study, and in the early stages of the study (Gillon, 2011; Gillon et al. 2014a), identification of the literature field followed the upward spiral process of refinement as described by Saunders et al. (2012), which involved setting research questions and objectives, and the definition and redefinition of search parameters and terms as a cyclical and iterative process. Literature was sourced, evaluated, and abstracts / full copies were evaluated, leading to redefinition and refinement prior to carrying out the bibliometric search.

The method for the bibliometric search was informed by research practice, for example that of conducting a systematic literature review process. In the review of literature within the academic field of management, transparency, inclusivity,

explanatory and heuristic criteria are relevant (Denyer and Tranfield, 2009). The researcher sought to be transparent in the use of the methods described below, and in using the findings to explain the development of the profession. Inclusivity of, for example, practitioner resources was appropriate to the bibliometric method applied in this study (e.g. search of the practitioner library) as was the exclusivity (e.g. Web of Science). It was necessary to identify which academic authors had written on OD so that it could be compared with what was held in the CIPD practitioners' library collection. A limitation of the bibliometric search was that although strict parameters could be set in sourcing academic literature, it was more difficult to apply similar parameters to a search of practitioner publications.

The bibliometric search first identified the databases to search, and a number of databases were searched for high quality academic and practitioner sources. The databases and libraries searched were:

1. The Web of Science
2. Copac
3. The CIPD library

The Web of Science was used to identify relevant academic journal articles and Copac was used to identify relevant academic texts. The CIPD library holds an extensive collection of books, academic and practitioner journals, and materials of interest to the practitioner community. The CIPD practitioner library catalogue was searched using the same search terms used for the academic publication searches, which were:

1. Organisation Development
2. Organisational Development
3. Organization Development
4. Organizational Development
5. OD

Searches were conducted for books, articles and reports with "*Organi?ation\* Development*" or *Organisation / Organization / Organisational / Organizational Development* or *OD* in the title. These search terms were designed to locate articles



with both US and UK spelling of organisation, and to identify article titles which included organisation or organisational development.

For the purposes of this study, it was appropriate to set search parameters related to the title of the work only. Although this narrowed the scope of the search by not including the phrase in the abstract or in the full work, it was consistent with the purpose to constrict the search in order to be able to compare (i.e. like for like) with the data collected in the content analysis data, that had also applied this criteria. A limitation of using these search terms was that published work on OD might be overlooked if it did not include one of the search phrases in the title. However, throughout the search and the content analysis a consistent approach was followed.

The search of Copac and the CIPD library generated several duplicate texts which were removed from the findings. There were particular difficulties in the Copac search, even after removing duplicates, with some listings for what appeared to be the same text, but was not a new edition, appearing in two consecutive years, as in the sample below:

Margerison, C. J. & Hunter, N. R. 1978. *Management and organisation development bibliography*, [Bradford], MCB.

Margerison, C. J. & Hunter N. R. & Drake, J. 1979. *Management and organisation development bibliography*, Bradford, MCB Publications.

Furthermore, the potential to accurately count and compare trends in volume across the sample timeframe was further complicated by the same text being published in several editions. It would be misleading to count the same text in updated editions for trends, but a false picture would be given if only the original publication was to be counted. An example of this is shown below:

French, W. L., & Bell, C. H. 1973. *Organization development: behavioral science interventions for organization improvement*, Englewood Cliffs, N.J., Prentice-Hall.

French, W. L., & Bell, C. 1990. *Organization development: behavioral science interventions for organization improvement*, Englewood Cliffs, N.J., Prentice-Hall.

French, W. L., & Bell, C. 1999. *Organization development: behavioral science interventions for organization improvement*, Upper Saddle River, N.J., Prentice Hall.

The counting of editions across the sample timeframe is further complicated by the existence of international editions, which has an additional impact on the country of origin volume trend comparison, as demonstrated below (the first text appears in the list above as a USA publication):

French, W. L., & Bell, C. H. 1973. *Organization development: behavioral science interventions for organization improvement*, Englewood Cliffs; [Hemel Hempstead], Prentice-Hall.

French, W. L., & Bell, C. H. 1978. *Organization development: behavioral science interventions for organization improvement*, Englewood Cliffs; London [etc.], Prentice-Hall.

French, W. L., & Bell, C. H. 1984. *Organization development: behavioral science interventions for organization improvement*, Englewood Cliffs, N.J.; London, Prentice-Hall.

French, W. L., & Bell, C. H. 1995. *Organization development: behavioral science interventions for organization improvement*, Englewood Cliffs N.J.; London, Prentice-Hall International.

In order to be able to make valid comparisons with the other bibliometric and content analysis searches, multiple editions of the same text were eliminated from the findings. A record was made of the searches as they were carried out: the date of the search, the database searched, the search terms used, and the number of articles identified in the search. Where possible, the results of academic publication searches were uploaded into Endnote software to enable grouping of the results by timeframe, main author, country of publication and main publisher. Any reporting of quantitative findings from the Copac search would be misleading, since there are

too many potential error factors (as outlined above) to be able to make valid total count comparisons (e.g. between decades or country of origin). There were nevertheless features of note from this search, such as obtaining a measure of the most published authors.

## Semi Structured Interviews

The third method employed was semi- structured interviews. Interviews have been used previously as a research method for investigation of OD practice. Neumann et al., (2009) set a key objective to craft methods suitable for OD and change in a special issue of the *Journal of Applied Behavioral Science*, finding that successful research predominantly used case and interview methods. Furthermore, semi structured interviews are appropriate given that they have previously been used alongside documentary evidence within a critical realist approach to HRM (e.g. Thursfield and Hamlett, 2004).

On a practical level, interviews can be conducted across physical distance and are suitable for exploring interviewees' past experience (Perakyla and Russuvuori, 2011). Defining the quality of interview data collection is difficult, nevertheless its acceptability as a method is increased by using it alongside other methods (Cassell, 2009). This study sought to achieve validity through triangulating interview data with other forms of data (Silverman, 2011).

There are a number of ways in which interviewees can influence the shape of research. Objectives are often negotiated with those who are in a position to sanction or block a research project and this often takes place within a multi-layered permission context (Buchanan and Bryman, 2007). There was no need to negotiate research objectives in this project, other than having to be mindful of fitting the interview length within the time made available by the interviewee. The data collected (in most cases) produces no positive or negative value for the employers of those being interviewed.

Managers are typically busy, so access to them is often likely to be influenced by the perceived commercial or personal gain from participation (Easterby-Smith et al., 2002). In this case, the researcher appealed to the altruistic characteristics in the interviewees, in being willing to give time to a PhD researcher in a subject area to which their accounts were of significance. The status of the researcher can impact power dynamics in the access relationship (Saunders et al. 2007) and can lead to issues around maintaining objectivity in relation to the researcher/s not aligning with the agenda of those who had the power to grant or withdraw permission for a project. In this research the nature of, and the subjects covered in, the semi-structured interviews were not of a character where the interviewee, or interviewer, had any obvious vested advantage in the way that views were depicted.

The researcher opted for semi-structured interviews rather than structured or unstructured interviews. An unstructured interview format was not appropriate, as responses were sought which related to apriori themes from the content analysis in order to compare data sources. Structured interviews are primarily oriented to a quantitative methods approach (Bryman and Bell, 2011; Cassell 2009) and the researcher's aim was to gather more rich qualitative data within a triangulated approach, and ensure a format open enough for the potential for new themes to emerge. Semi-structured interviews were also congruent with the epistemological assumptions for the critical realist stance adopted in this study (Cassell, 2009).

The steps to obtain interview data reflect the eight steps recommended by Chell (1998) in conducting critical incident interviews:

1. There was an initial design of the interview and a determination of the sampling mechanism for interview subjects.
2. The interviewer gained (or in a few cases did not gain) access to the interview subjects, with some previously known to her, several were not.

3. The interview introduction was considered (both in pre interview correspondence and at the start of the interview) and the initial interview questions were critical incident in nature.
4. The background to the research (and to the researcher) was explained as was the focus of the themes of the interview.
5. The researcher applied a level of control to the interview, asking some predetermined questions, following up with probing questions and clarifying understanding.
6. The researcher closed the interview and explained what would happen next (i.e. a copy of the interview notes would be sent back to the interviewee for checking and amendment).
7. The ethical issues were addressed, in this research project this step was carried out under steps two and three.
8. The data was analysed using NVivo software.

These steps were used as a checklist to inform the design of the interview, and to gain access to interviewees. The conduct of the interview was also informed by Chell's (1998) advice (above) as was the recording and coding of the data collected.

### **3.5.1 Sample determination**

A primary purpose of the interviews conducted with subject experts was to compare academic and practitioner perspectives on the nature and development of UK OD between 1970 and 2010, and to explore the sources of influence in the dissemination of changes in practice. Exploring the views of the professional association (in this case the CIPD) and leading thinkers was also important. A purposive sampling process was used to identify potential interview interviewees *'because it illustrates some feature or process in which we are interested.'* (Silverman, 2013: 203). Non probability, purposive sampling could imply a process

which is less justifiably objective than using probability sampling, however the researcher thought '*critically about the parameters of the population*' and chose purposive sampling on the basis that it was the best fit approach for the purpose (Silverman, 2013: 203).

To achieve a degree of comparison of perspectives, a broadly similar number of academic (n=8) and practice / business leader interview subjects (n=10) were selected and a smaller number (n=3) of leading influencers. More interviewees were selected in the practice than academic group, as the practitioner group included two types of interviewee; subject practitioners and business leaders.

A decision algorithm (see Saunders et al., 2012: 282) was applied to determine the purposive sampling mechanism. The purposive sample selected was '*heterogeneous*' (a criteria in the algorithm), in that the purpose of the interview was to reveal and illustrate '*key themes*', and a mix of academic and practitioner subject experts was required to establish differences and similarities of view. The interview data would also be '*typical case*' in nature; and the interview data would be '*illustrative*'. Finally, the sampling mechanism was intended to allow for the generation of '*theoretical*' data, in that it was intended to '*inform emerging theory*' (Saunders et al. (2012: 282).

Given the requirement for interviewees to be experts, it was more important to identify a suitable mix of specialist backgrounds than it was to identify interviewees who were geographically close enough to engage in face to face interviews.

Although visual reaction data would be missed if the interviews were not carried out in a face to face, it was decided to be more important to have access to the views of appropriate experts.

Initially, a broad target of twenty five interviews was set. However, saturation (Bryman, 2012) was reached after 21 interviews, with no new themes arising from interviews. The number of interviews was deemed sufficient (Mason, 2012). As reported above, the final number of subject expert Interviews, by type of subject expert is shown in the Table 4.2 below.

<b>Academics</b>	<b>Senior Practitioners &amp; Business Leaders</b>	<b>Leading Thinkers / Influencers</b>
8	10	3

Table 4.2 Categories of Subject Experts

In selecting experts for interview, an attempt was made to gain access to interviewees from a variety of sectors and experience bases, ensuring an element of stratification (Saunders et al., 2012). The full detail on the selection of interviewees is outlined in the Appendix 4.4. This list was ordered chronologically by the date of interview. It was deliberately decided to not group the timing of interviews by category of interviewee, and instead to randomise the order by availability of the interviewee and ease of access.

The 8 academic interviewees worked in various fields in the OD discipline, the OD and HRM / HRD discipline, and the HRM discipline. There was also diversity in the type of academic roles interviewees held, with some spending significant time teaching on CIPD accredited courses; some with leading research profiles; and others holding primary positions as senior academic managers.

Senior practitioner interviewees were also drawn from a range of OD / HRM / HRD expertise and from organizations which differed in size and type. An attempt was made to draw from a pool of people with different professional background experience. As with the business leader sample, the researcher was careful to ensure that a broad range of business sectors were represented in the senior practitioner sample. The business leader sample (4 interviewees) consisted of two who had prior careers in HR and two who came from general management career backgrounds, so in that regard they could contribute from both a Business Leader and Senior Practitioner perspective.

The leading influencer interviewees all held positions which had influence on others' views of OD, including the professional map manager of the CIPD; a prolific author who regularly featured in a UK HR leading thinkers lists; and one of the longest standing principal researcher/ consultants from The Tavistock Institute.

Other interviewees had originally been selected with the sampling features in mind, but it was not possible to secure access to all first choice subject expert interviewees. The original interview list included the subject experts listed in Appendix 4.5, to whom it was not possible to gain access. However, access to some interviewees was gained through existing contact networks, and as such the request to interview was comparatively informal in keeping with the prior relationship. Several interviewees were recruited by personal approaches made at events, such as the Francis et al., (2012) book launch, or recommended through introduction from others. In addition, some interviewees were recruited through sourcing publicly available contact details and inviting participation by email or letter.

### **3.5.2 Interview design**

Significant consideration was given to whether interviewees should be given prior information on OD to prompt their responses (Cassell, 2009). However, it was decided that to avoid leading or influencing interviewees, no information would be provided on the findings from the content analysis prior to interview. The order of questions in the interview was arranged to build rapport, with time for probing and follow up questions fitting with the aims of the project (Silverman, 2011). The interview was designed to ensure the inclusion of introductory questions, with time to build rapport with follow up and probing direct questions and questions to interpret and clarify meaning (Bryman and Bell, 2011), with pauses and silences included to allow the interviewee time to reflect, consider and add further comment.

Three interviewees were selected for pilot interview purposes (see Appendix 4.6). The format of the pilot interviews and the feedback notes from these is attached in



Appendix 4.7. As a result of the feedback from pilot interviews, the interview design was revised. However, during the course of the initial interviews in the main study, it became apparent that some questions were providing responses that would lead to data being flawed in the analysis stage. In particular, the early main study interviews contained four Likert rating scale questions. Interviewees often asked for clarification of question meaning prior to answering, so it became clear that there were different ways to interpret the questions. This difference in interpretation would have been acceptable in terms of qualitative response data, but in seeking to take any form of quantitative meaning or interpretation and comparison from the data it would lead to misleading results if all responses were used in a *like for like* fashion. After consultation with the supervisory team, it was decided that the interview format should be refined and the Likert scale response questions taken out. The interview formats used are included in appendices 4.8 to 4.11, with Format 1 (Appendix 4.8) being the first format used.

### 3.5.3 Consideration of the Role of the Researcher in Interviews

In gathering interview data researchers should adopt protocols which are *'particularly appropriate to the logic of qualitative research'* (Silverman, 2011: 369). With this in mind, it was important to consider *'the impact of the researcher on the setting (the so called 'halo' or Hawthorne' effect) and the truth status of a respondent's account'* (Silverman, 2011: 369). Moreover, contemporary debates in using interviews as a research method make reference to researcher reflexivity, the active nature of the interview, and 'real-life' accounts (Cassell, 2009). Reflexivity comprises the researchers' reflectiveness about the implications of their *'methods, values, biases, decisions, and mere presence in the very situations they investigate'* (Bryman and Bell, 2011: 718).

In this study, the researcher's background was useful in understanding how best to secure access and build rapport with interviewees, and in the application of interview questioning skills. However, it was also recognised that having been an HR / OD practitioner for over two decades made it difficult to limit the level of

interactivity (Cassell, 2009) by rigidly following a set of scripted questions. However, as semi-structured interviews are designed to be flexible and allow for the collection of rich qualitative data, rigorous adherence to a strict question format was not a crucial issue in this case and there was interaction between interviewer and interviewee in the co-construction of ideas.

Given her background and experience, the researcher was skilled in building rapport, and reassuring interviewees that she understood their perspective, and the pressures they were under in terms of norms, and to accept their point of the view in a non-judgemental manner (Silverman, 2011). Criticality was required on the researcher's part to ensure that she regularly reflected on her level of objectivity (Silverman, 2011). For example, in recording interviewee comment she sought to accurately represent interviewee's comments rather than being influenced by her own views. In the opening briefing of the interview, the researcher asked the interviewee to interrupt if they felt they were being led by the interviewer.

The researcher considered how to present herself (Silverman, 2011) and in each case presented herself in accordance with the norms of each context, in consideration of building rapport with each of the interviewees to facilitate the research process. In interviews with senior practitioners and business leaders, norms of dress and language appropriate to their business context were followed. Her experience of academic and research work and membership of a leading UK scholarly body committee ensured that she was confident conducting interviewees with academic subject experts, following expected academic norms, albeit consciously not at the same level since she was in her role as a PhD student.

#### **3.5.4 The Context of the Interviews**

The location and medium of the interview must fit with the underlying epistemological assumptions of the study (Cassell, 2009). As such, details were explicitly recorded and documented in the interests of methodological transparency. The interviews were conducted by a single researcher, so there were

no issues in relation to multi researcher validity (e.g. Silverman, 2011). The interviewer recorded notes on the context of the interview (Bryman and Bell, 2011), and Appendix 4.12 details the name of the interviewee, the date of the interview, the format of the interview questions, the location of the interview, the knowledge the researcher had of each of the interview subjects prior to the interview, and information of how the initial contact was made.

Face to face interviews can be used to provide information on the interviewee's emotional reaction (Bryman and Bell, 2011). However, the purpose of the interview data collected did not rely on observing or recording this type of reaction. In this instance it was judged more important to interview subjects with the right expertise, rather being able to see their physical reactions during the interview. Several of the experts were based in locations where face to face interviews were not feasible, and as such telephone interviews were used. Although long interviews by telephone were difficult (Bryman and Bell, 2011), the nature of the interviewees as senior experts in their field meant that the level of concentration was sufficiently high to over-ride this concern.

Research interview protocol guidance is important to ensure that interviewees are aware of the interview process and purpose of the study, and for interviewees to provide informed consent for the recording, storage and use of data (Silverman, 2013). Prior to the interviews taking place, interviewees were provided with information about the purpose and nature of the interview, the interview questions, the reason why they had been selected to take part, the approximate time it would take, the informed consent process, and what would happen with the data collected.

The researcher was familiar with carrying out interviews for a variety of purposes during two decades as a practitioner in the profession, including those where the documentation may be later subject to legal process. In these interviews, audio recording devices had not been used. Although Silverman (2013:208) proposes that research interviews '*should always be recorded*', it is worth noting '*that there is no*

*'best' method for transcribing interviews – so transcribe in a way that is appropriate to your research problem and theoretical model ...'* (Silverman, 2013: 209). Other business research methods scholars (such as Bryman and Bell, 2011) allow for non-usage of audio recording in research interviews.

A high number (12) of the interviews for this study were conducted by telephone, a consideration in terms of audio recording as telephone conversations are more difficult to record (Bryman and Bell, 2011). The collection of high quality data in this context was achieved by building rapport through thinking about *'how to get the interview subject to talk a lot – openly, trustfully, honestly, clearly and freely – about what the researcher is interested in'* (Cassell, 2009: 51). The researcher was very practised in attending to these matters whilst taking notes throughout interviews. Moreover, the researcher's confidence was in her note taking ability and accurate recall: she was less confident in the use of audio recording and did not want this to detract from the interview. Nor did the researcher want to have recording being disconcerting to any interviewees as she was keen to build rapport and have them talk freely.

Interview notes were transcribed after the interview and sent to the interviewee for comment, correction, deletion or addition of information prior to arriving at the final set of agreed interview records. This process is *'... known as respondent validation'* (Silverman, 2011: 369).

## Ethics

The information used in the content analysis and bibliometric data collection exercises was from publicly available sources. None of the material was linked to specific individuals and as such, the analysis and presentation of this information should not cause harm to any person or organisation.

In relation to the interview data collection, the ethics processes applied was that governed by the regulations of the awarding institution for this PhD. The research

ethics process was applied and approval was sought and gained from the College of Business, Law and Social Sciences of Nottingham Trent University research ethics committee. Ethical approval was sought and granted for the interview data collection as the project involved the collection and analysis of primary or unpublished data from, or about, living human beings, and the collection and analysis of primary or unpublished data about or from organisations or agencies of any kind, other than data that are already in the public domain. This approval was subject to the requirement to have an informed consent process.

The ethics approval process was used to enhance the study design and was used to assess the suitability of the research design. The issue of agreeing the level of interviewee anonymity and confidentiality is important when using a *critical incident* technique (Chell, 1998). Given the less personal nature of the data being gathered, four options were given to the interviewees on their preferred level of anonymity. The informed consent form used with each interviewee can be found at Appendix 4.13.

The level of consent given by the interviewees is outlined in Appendix 4.14. Ultimately, with regards ensuring interviewee confidentiality in the findings, and for consistency in reporting it was decided that Level 2 anonymity would be applied for all interviewees: *'My name can be noted in a list of interviewees within the thesis, but I do not wish any specific quotes to be identifiable as being mine'*.

Confidentiality of interviewees in the text of this document was therefore preserved through the application of a label which identified the interviewee by category. For instance, academic interviewees were labelled as *'Academic'* followed by a number (e.g. ACADEMIC 1, ACADEMIC 2 etc.), Senior Practitioner, Business Leaders and Leading Influencers were identified in the same manner. The author holds the sole record of the identifying label key for the interviewees.

## Limitations

There are a number of limitations to this research as a result of the methods employed. The media used for the content analysis was constrained to one publication of the trade press, as using online and other media would not have allowed for the use of a systemised process. As such, the generalisability of the findings in this area is limited as a result of not using other media sources. Although this did not affect the collection of interview data, this study was to some extent embedded within the framework of the HR profession in the UK.

A further limitation was related to the coding method applied to advertisements. Although many of the advertisements contained rich and detailed text, coding was limited to single word count, involving each code being counted only once for each advertisement. A more comprehensive analysis of the text may have provided more nuanced results. However, this was not possible for a single researcher within the time frame of this project.

Changes in general language use would take place over any forty year period, and in the domain of management and business this would equally apply. The researcher was mindful of this issue and in exercised caution in the interpretation of results. In terms of the content analysis this was taken into account in the coding dictionary, so for example the term *Personnel* might now be considered outdated and old fashioned, but in the coding dictionary it is nevertheless accounted for, since it was once a commonly used term, and was coded in the same category as *HR*.

There were time and access limitations during the semi-structured interview data collection process; both in terms of the number of interviews to be carried out and in the time each interviewee could reasonably be expected to give. Although a limited number of interviews was carried out, a saturation point was reached where little in the way of new information was found. As such, the number of interviewees was not a key concern.

As subject experts, the interviewees tended to be busy people with demanding schedules, although they provided up to two hours of their time to be interviewed. Nevertheless, it was often difficult to finish the interview in the allocated time. As the interview schedule progressed, the researcher reviewed the questions order to elicit the most important information from each interviewee. However, this makes direct comparison between interviewees more difficult. It was not always possible for the researcher to remain silent and interviewees sometimes asked questions of the researcher. In some cases, it may have seemed cold and unresponsive for the researcher to have remained silent or resistant to input. Whilst this may be considered as *leading* responses, the interviewee was briefed at the outset to inform the interviewer if she was at any time influencing responses.

A challenge with the bibliometric search was that whilst high quality academic publications were easily searchable over the period under study, in a manner which permitted systematisation of search, this was not the case for practitioner resources and those from the more general business community. Comparing like with like was therefore difficult. In terms of countries of influencing thought as to what OD was and is, it was comparatively easy to establish the country of publication of a journal, but this did not necessarily reflect the country base of the author. Ascribing *country of origin* to ideas from the country of publication of a text or journal article did not acknowledge the complexity of dealing with an academic such as Kurt Lewin, a German who was based in the US after having spent some time with the founders of the Tavistock Institute. Books were even more difficult to classify in terms of country of origin as several had multinational bases. Subject discipline boundaries were also difficult to fix: to say Kurt Lewin fitted within one clearly bounded subject discipline would be erroneous. As such, to over generalise could be flawed with this method.

With both the content analysis and the bibliometric data analysis being, at least in part, a comparison between decades, the last ten year period ended in 2010. This limited the opportunity to provide updated meaningful comparisons after 2010. In any case, with the content analysis after 2010, hard copy advertising had almost

disappeared, so extension of this method would have become severely limited in terms of valid comparison.

Despite these limitations, the combination of methods means that greater emphasis can be placed on the reliance of the evidence than if just a single source of evidence had been used.

## **Conclusion**

This chapter has demonstrated the methodological choices made in this research, informed by the existing business research methods literature and with a view to answering the research questions. The research adopts a critical realist ontological position through the adoption of content analysis, a bibliometric search and semi structured interviews. Having utilised three methods provides opportunity for the triangulation of data. The next two chapters present the findings from the application of these methods.



## **Chapter 5. Findings from the Content Analysis and Bibliometric Trends**

This chapter presents the findings from the content analysis and the bibliometric searches addressing the study's first research question, which is to establish to what extent there is a difference between the academic literature and practitioner perspective of the development of the OD profession in the UK. The data presented in this chapter will also relate to the second research question, which focuses on the evidence on development of the form, magnitude and perceived importance of the OD profession.

The content analysis data will detail the change in volume of roles advertised between 1970 and 2010, and the development of the content of roles, as portrayed in the wording of job advertisements, will also be presented. The bibliometric search data provides information on the trends in writing on OD over the decades under study, in terms of volume and country of origin. The purpose of this is to investigate the main sources of influence in shaping the perception of the features that make up OD. Searches were conducted using The Web of Science, Copac, Google Scholar and the CIPD practitioner library catalogue. The findings presented here will be discussed in Chapter 7.

### **Content Analysis Findings**

#### **4.1.1 Change in the volume of OD Job roles over the four decades**

In order to understand the extent of difference between the academic literature and practitioners' perspective of the development of the OD profession in the UK, an examination of the evidence on the development of the profession in terms of size, status and content is required. As such, changes in the number of OD job roles advertised, and the nature the development of OD roles over time will be presented as a measure of this development. Trends in academic publishing on the subject of OD are then compared with this data.

A count was conducted of advertised job roles in the publication *People Management* and its predecessors, with OD and its specified variations in the job title (hereafter referred to as OD job roles), over the four decades from 1970 to 2010. In order to source every copy of the publication since job advertisements began, it was necessary to visit 6 libraries: The University of The West of Scotland, The Mitchell in Glasgow, Glasgow University, Strathclyde University, Glasgow Caledonian and the CIPD Library in London. As explained in Chapter 4, the title and frequency of the publication issued to CIPD, and its predecessors', members changed over the period of this study and the details of change in publication are outlined in Appendix 4.1. No OD job roles were published between 1967, when job advertisements first appeared in the CIPD press, and 1971. The first job advertisement for an OD job role was identified in the September 1972 issue. Table 5.1 shows the number of OD job roles in the 1970s. The *VOLUME* number given in the second top row relates to the publication) sequencing for each year. **The bottom row, Total is the number of OD job roles per year.**

	1970	1971	1972	1973	1974	1975	1976	1977	1978	1979
VOLUME	2	3	4	5	6	7	8	9	10	11
Jan	0	0	0	0	0	0	0	0	0	0
Feb	0	0	0	1	0	0	0	0	0	0
Mar	0	0	0	0	0	0	0	0	0	1
Apr	0	0	0	0	0	0	0	0	0	1
May	0	0	0	0	0	0	0	0	0	0
Jun	0	0	0	1	1	0	0	0	1	0
Jul	0	0	0	0	0	0	0	0	0	0
Aug	0	0	0	0	0	0	0	0	0	0
Sep	0	0	1	0	0	0	0	1	0	0
Oct	0	0	0	0	0	0	0	0	0	0
Nov	0	0	0	0	0	0	0	0	0	0
Dec	0	0	0	0	1	0	0	1	0	0
<b>Total</b>	<b>0</b>	<b>0</b>	<b>1</b>	<b>2</b>	<b>2</b>	<b>0</b>	<b>0</b>	<b>2</b>	<b>1</b>	<b>2</b>

Table 5.1 Number of OD Job Role Advertisements in the 1970s (from *Personnel Management: the magazine for Human Resource Professionals*)

The number of OD job roles advertised was low throughout the 1970s. Similarly low levels were advertised in the first half of the 1980s. However, there was then a rise in the advertisement of OD job roles, as can be seen in Table 5.2. The bimonthly publications up until the end of the 1980s were stored offsite from the London CIPD

library. Publications were bimonthly until the end of 1994, and then moved to twenty four issues a year between 1995 and 2010. With anticipated small numbers of OD job roles in the 1980s publications based on data already collected, and the difficulties and cost involved in accessing the publications, it was decided not to include this source in the sample.

	1980	1981	1982	1983	1984	1985	1986	1987	1988	1989
VOLUME	12	13	14	15	16	17	18	19	20	21
Jan	1	0	0	0	0	0	0	0	0	1
Feb	0	0	0	0	0	0	1	0	0	2
Mar	0	0	1	0	0	1	0	1	0	1
Apr	0	0	0	0	0	0	0	0	0	0
May	0	0	0	0	0	0	0	0	1	0
Jun	0	0	0	0	0	0	0	0	1	0
Jul	0	0	0	0	0	0	0	0	2	1
Aug	0	1	1	0	0	2	1	1	1	0
Sep	0	0	0	0	0	1	0	2	0	0
Oct	0	0	0	1	0	0	0	0	1	1
Nov	0	0	0	0	0	0	2	0	0	0
Dec	0	0	0	0	0	0	1	0	1	1
<b>Total</b>	<b>1</b>	<b>1</b>	<b>2</b>	<b>1</b>	<b>0</b>	<b>4</b>	<b>5</b>	<b>4</b>	<b>7</b>	<b>7</b>

Table 5.2 Number of OD Job Role Advertisements in the 1980s (in Personnel Management: the magazine for Human Resource Professionals)

As a result, post 1990 advertisements could not be compared *like with like* in terms of the raw numbers, but the change in trend was distinguishable nonetheless. Table 5.3 below shows the number of OD job roles advertised in the 1990s. Since from July 1990 to December 1994 there was a second monthly publication, there are two columns for each year, with the second column for each year relating to the bi-monthly publication (e.g. *PM Plus*). **The *Total* given in the bottom row is the number of job roles for that year.**

	1990		1991		1992		1993		1994		1995	1996	1997	1998	1999
VOLUME	22		23		24		25		26		1	2	3	4	5
Jan	0	n/a	0	0	0	0	0	0	0	0	3	1	0	2	1
Feb	3	n/a	0	0	0	0	0	0	0	0	0	0	1	0	3
Mar	0	n/a	0	0	0	0	0	0	1	0	0	3	4	1	5
Apr	1	n/a	1	0	0	0	1	0	1	0	1	0	2	5	3
May	2	n/a	0	0	0	0	0	0	0	0	3	2	2	2	3
Jun	0	n/a	0	1	1	0	0	0	0	0	2	1	0	2	4
Jul	2	1	1	0	0	0	0	0	5	0	1	1	2	4	6
Aug	0	0	0	0	0	1	2	1	0	0	1	0	3	0	1
Sep	0	0	0	0	0	0	0	0	2	0	1	1	1	3	2
Oct	1	0	0	1	1	0	0	0	0	2	0	0	2	3	5
Nov	2	0	0	0	0	0	2	0	0	0	1	4	4	2	2
Dec	0	0	0	0	0	0	0	0	2	n/a	0	1	1	1	2
	11	1	2	2	2	1	5	1	11	2					
<b>Total</b>		<b>12</b>		<b>4</b>		<b>3</b>		<b>6</b>		<b>13</b>	<b>13</b>	<b>14</b>	<b>22</b>	<b>25</b>	<b>37</b>

Table 5.3 Number of OD Job Roles Advertised in the 1990s (in Personnel Management: the magazine for Human Resource Professionals, and the bi-monthly PM Plus and Personnel Management Plus between 1990 and the end of 1994 and in People Management since January 1995)

There was a fall in the number of OD job roles advertised between 1991 and 1993, prior to an increase towards the end of the 1990s: from 1994 onwards. The number of OD job roles advertised continued to grow significantly between 2000 and 2010, as can be seen in Table 5.4.

	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
VOLUME	6	7	8	9	10	11	12	13	14	15	16
Jan	5	2	8	5	11	8	7	11	6	10	7
Feb	3	7	5	2	6	10	3	3	10	5	5
Mar	8	7	6	0	7	12	4	2	3	5	3
Apr	7	10	4	3	6	6	4	3	5	5	5
May	6	7	9	10	12	2	9	10	9	8	1
Jun	0	3	4	6	10	15	6	9	12	7	4
Jul	2	2	2	3	3	4	6	3	7	6	3
Aug	6	4	3	4	0	2	3	6	3	0	1
Sep	5	5	7	10	7	10	7	3	11	9	4
Oct	6	4	4	11	8	2	7	6	11	0	2
Nov	3	1	4	5	9	6	6	9	2	6	0
Dec	3	3	3	5	3	2	0	2	1	1	0
<b>Total</b>	<b>54</b>	<b>55</b>	<b>59</b>	<b>64</b>	<b>82</b>	<b>79</b>	<b>62</b>	<b>67</b>	<b>80</b>	<b>62</b>	<b>35</b>

Table 5.4 Number of OD Job Role Advertisements, 2000 - 2010 (in People Management)

Although there was a decrease in the number of OD job roles advertised at the end of the 2000s, there were still a relatively high number of jobs being advertised in print publications, bearing in mind the increasing use of the internet for recruitment. One of the interviewees with extensive experience in the UK

recruitment industry (BUSINESS LEADER 2) recounted that '*the biggest change from hard copy advertisements to online attraction mechanisms happened 2008*'. In assessing how the numbers of OD job roles advertised compares with other job roles in the paper copy of the same publication, a count was conducted in the job advertisement section of the March and September issues for each 5 year period under study. The data from this exercise is detailed in Table 5.5.

Year	March Advertisement Section Page Count	September Advertisement Section Page Count	Total
1970	31	23	54
1975	28	20	48
1980	35	26	61
1985	40	40	80
1990	87	75	162
1995	71	80	151
2000	171	182	353
2005	81	122	203
2010	9	13	22

Table 5.5 Numbers of pages in the job advertisement section in the hard copy of the CIPD publication between 1970 and 2010

The number of pages in the job advertisements section in the CIPD hard copy publication peaked at 353 advertisements in 2000. However, this had fallen to a total of 22 adverts by 2010. This downwards trend in advertising of job roles in the paper publication of *People Management* and its predecessor publications, from Table 5.5 is depicted in Figure 5.1 to provide a visual representation of the data below.

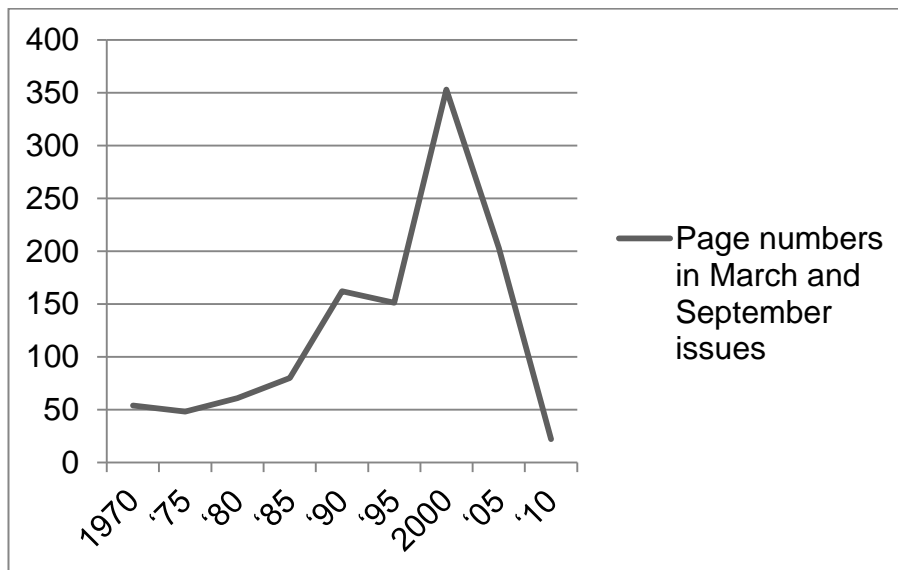


Figure 5.1 Figures from Table 5.5 represented in a graph format (i.e. Numbers of pages in the job advertisement section in the hard copy of the CIPD publication between 1970 and 2010)

According to interviewee BUSINESS LEADER 2, the significant decrease in the job advertisements was due to the increased use of online methods for recruitment. However, despite the decrease in advertising of all vacancies in the CIPD paper publication post 2000, the number of OD job roles advertised continued to grow, and therefore the share of advertisements in comparison to other HR specialist areas also grew. As such, the data shows that there was a clear growth in the number of OD job roles advertised between 1970 and 2010. To provide a visual representation of this growth trend is shown in Figure 5.2, using the data from Tables 5.1 to 5.5 above.

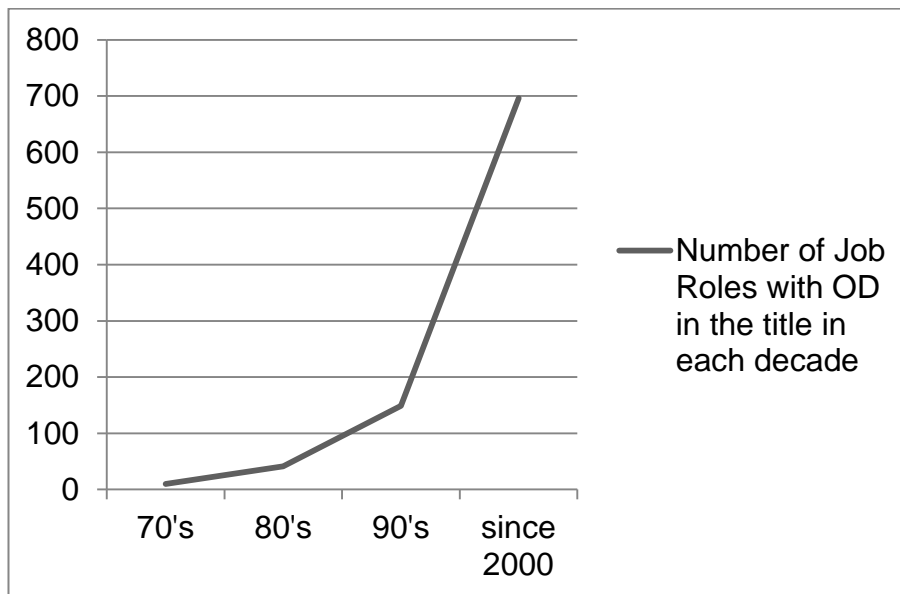


Figure 5.2 Number of OD Job Roles in each Decade in *People Management* and its CIPD publication predecessors

Despite the difficulties and limitations in the application of a precisely reliable and valid method for collecting this type of data, there is an apparent and significant growth trend in the number of OD job roles advertised.

#### 4.1.2 OD's Presence in the Private, Public and Other Sectors

The distribution of OD job roles across the public, private and other sectors advertised was also examined (post 1995). The percentage ratios of total OD job advertisements by sector are presented in Table 5.6.

Although this data provides a general indicator, a level of caution should be applied in interpretation, particularly in relation to the later years. Private sector organisations have, in particular, progressed to using online and headhunting methods of recruitment. With the onus on the public sector to demonstrate transparency in recruitment processes, they continued to use hard copy as a media for advertising job roles. So although the proportion of private sector job roles, for example post 2007, is very small, this may be more because they were faster to transfer to using online methods of recruitment.

	Public Sector	Private Sector	Other (e.g. social enterprise)
1995	53.8	30.8	15.4
1996	35.7	57.1	7.1
1997	40.9	54.5	4.5
1998	40.0	44.0	16.0
1999	51.4	40.5	8.1
2000	48.1	42.6	9.3
2001	52.9	35.3	11.8
2002	73.2	16.1	10.7
2003	73.4	12.5	14.1
2004	60.8	16.5	22.8
2005	72.2	20.3	7.6
2006	56.5	22.6	21.0
2007	65.2	12.1	22.7
2008	76.3	11.3	12.5
2009	87.1	6.5	6.5
2010	74.3	0.0	25.7

Table 5.6 Percentage Ratio of Jobs Advertised by Sector 1995 – 2010

#### 4.1.3 Salary data as an indicator of perceived importance of OD

Another indicator of perceived importance of the field of OD in practice is the level of salary of OD roles in comparison to other HR roles. Gathering data on salary levels was particularly difficult as not all OD or HR job role advertisements cited a salary. Those advertisements that did often presented it within a range alongside other elements of an employment package such as a company car or performance related pay, which were not easily quantifiable. In addition, comparing salary levels over a forty year period would be a nigh on impossible task to carry out with any level of validity. In short, making comparisons of the perceived importance of a profession by comparing remuneration packages had substantial potential for misinterpretation.

However, this study examines an area that eminent mainstream HR academics ardently ignored or considered to be an out of date fashion. Whilst it is understood that salary data must be approached with considerable caution, it can be useful in providing a general indicator of status. For this purpose, data from a 2012 HR specialism salary survey carried out by Hudson Global Resourcing (Hudson, 2012)



will be used. The data collection method was not transparent, but it might reasonably be assumed that the data provided for *The South* used the same data collection method and all the data for *Scotland* used the same internal method. Therefore even if it is invalid to compare them with each other, we could treat them as two separate samples: as independent tendencies.

The Hudson (2012) data covers a range of six sectors, for two geographical areas so the sectoral split of the data as documented was followed. Salaries for *Manager* and *Head of* roles in each of the HR specialism areas are represented in Table 5.6 below. In order to compare these OD job role salaries with other HR specialisms, an arithmetic mean of salaries was calculated and compared with the arithmetic mean of OD specialty salaries.

The difference between the average salaries of the other HR specialisms and OD are provided in a £ pa and a % difference format in the bottom two rows of Table 5.7. In *The South* only, the *Not for Profit* salary differential was small (£1k pa or 2%) with the percentage difference in all other sectors being at least 34% higher. In *Scotland* the salary differentials were less extreme (with 32% as the highest difference), but again all were higher. *Not for Profit* OD salaries in *Scotland* had a higher differential than in *The South*. *Professional Services* OD practitioners in *Scotland* did not have such a high differential than they did in *The South*. Overall, it was of note that this data shows that in all instances, OD salaries are consistently higher than the other HR specialisms.

2012 HR Average Salaries (£k)		The South						Scotland					
		Banking & Finance	Energy & Utilities	Media & Technology	Not for Profit & Charity	Professional Services	Retail, Leisure & FMCG	Banking & Finance	Energy & Utilities	Media & Technology	Not for Profit & Charity	Professional Services	Retail, Leisure & FMCG
<b>Generalist</b>	Manager	50	55	55	38	48	45	45	40	35	32	45	36
	Head of	75	70	70	55	65	65	85	70	70	55	70	70
<b>L&amp;D / Talent</b>	Manager	50	52	50	38	50	50	43	40	42	30	43	42
	Head of	70	68	65	50	65	60	75	70	55	40	75	55
<b>Recruitment / Resourcing</b>	Manager	55	60	55	38	45	50	43	43	42	42	43	42
	Head of	70	90	66	48	65	68	75	60	60	60	75	60
<b>HR Reporting / MIS</b>	Manager	50	52	38	36	50	52	38	30	30	42	43	30
	Head of	70	80	56	55	70	75	50	45	45	60	75	45
<b>ER / IR</b>	Manager	55	60	50	40	55	50	45	40	40	42	43	40
	Head of	75	80	70	47	75	80	65	63	63	60	75	63
<b>Reward (or C&amp;B if no 'Reward')</b>	Manager	50	55	50	45	60	53	40	35	35	42	43	35
	Head of	90	80	70	52	85	70	65	50	50	60	85	50
		760	802	695	542	733	718	669	586	567	565	715	568
<b>The above averaged:</b>		<b>63</b>	<b>67</b>	<b>58</b>	<b>45</b>	<b>61</b>	<b>60</b>	<b>56</b>	<b>49</b>	<b>47</b>	<b>47</b>	<b>60</b>	<b>47</b>
<b>OD</b>	Manager	75	96	75	40	75	75	50	50	50	42	53	50
	Head of	95	100	90	52	90	95	75	75	75	60	70	75
		170	196	165	92	165	170	125	125	125	102	123	125
<b>OD average of Mgr &amp; Head of</b>		<b>85</b>	<b>98</b>	<b>83</b>	<b>46</b>	<b>83</b>	<b>85</b>	<b>63</b>	<b>63</b>	<b>63</b>	<b>51</b>	<b>62</b>	<b>63</b>
<b>OD compared to other HR salaries in £pa</b>		<b>22</b>	<b>31</b>	<b>25</b>	<b>1</b>	<b>21</b>	<b>25</b>	<b>7</b>	<b>14</b>	<b>15</b>	<b>4</b>	<b>2</b>	<b>15</b>
<b>OD compared to other HR salaries as a % higher</b>		<b>34</b>	<b>47</b>	<b>42</b>	<b>2</b>	<b>35</b>	<b>42</b>	<b>12</b>	<b>28</b>	<b>32</b>	<b>8</b>	<b>3</b>	<b>32</b>

Table 5.7 Salary Data: Comparison of OD Salaries with other HR Specialisms

#### 4.1.4 Changes in the content of job roles each of the four decades

The findings on the development in the volume of OD job roles over the four decades, sectoral differences and salary differentials, have been presented above. In this next section the nature of change in the content of OD job roles will now be reviewed. A sampling mechanism was applied to select job advertisements to which the coding dictionary (Appendix 4.3) would be applied. It was assumed jobs advertised in the CIPD publication would be UK based, and roles based outside the UK would be an exception. The coding exercise resulted in the identification of twelve main elements of OD:

- *Change Management*
- *Consultancy Orientation*
- *Behaviour and Cultural Issues*
- *HR, Learning and Development (HRD)*
- *OD*
- *Effectiveness*
- *Learning Organisation*
- *Partnership*
- *Strategic Approach*
- *Leadership and*
- *Not just HR (Organisation Wide Orientation)*

A code of **Change** was applied to all advertisement words where change was explicitly mentioned, and also where other words were used which implied that change was expected, planned or underway. Words used in advertisements which were coded in this category included: *vision, growth, new direction, future, development, transformation and innovation*. Advertisements coded in the category of **Consultancy** were those that included words and phrases such as *project(s), intervention, programme, action research and clients*. Advertisements coded in the category of **Behavioural and Cultural** were those that included words and phrases such as *values, inspire, motivate, hearts and minds, psychology, team building and*

*personal change*. Advertisements coded in the category of **HR** included words and phrases relating to traditional HR, such as *recruitment, manpower planning, pay and grading, employment law and equal opportunities*. Advertisements coded in the category of **HRD (L&D)** included words and phrases such as *learning, coaching, training, succession planning, competence and 360 degree feedback*.

Advertisements coded in the category of **OD** included words and phrases such as *Organisation development, organisational development, organisation analysis, organisation design and job design*.

Advertisements coded in the category of **Effectiveness** included words and phrases from a large list of available in the coding dictionary including: *organisational capability, business objectives, performance, improvements, productivity, value and fully exploit*. Advertisements coded in the category of **Learning Organisation** included terms such as *continuous learning, change capability, continuous improvement, resilient and agile*. Advertisements were coded in the **Partnership** category when they suggested a spirit of active inclusion and concern for people. Words and phrases in this category included: *engagement, wellbeing, best employer and joint working*. Advertisements were coded in the category of **Strategy** if they indicated a strategic orientation through the use of a relatively small range of words and phrases including: *overall direction, big picture, and executive and board level*. Advertisements coded in the category of **Leadership** were also classified by the use of a small range of words and phrases: *leaders, leadership, management, head up and shaping*. Advertisements coded in the final category of **Not Just HR** included words and phrases that referred to the wider context of an organisation, including: *corporate, wider influence, business needs, commercial awareness, entrepreneurial and building business*.

Findings from the coding exercise are detailed in Table 5.8 below.

	CIPD Member	Interpersonal	Change	Consultancy	Culture (inc Behavioural)	HR	HRD	OD	Effectiveness	Learning Organisation	Partnership	Strategic	Leader	Not just HR	Advert numbers
<b>Raw number count</b>															
1970's	2	1	6	6	10	4	4	9	4	0	0	1	1		11
1980's	0	0	7	5	3	9	5	8	3	0	0	3	0	0	8
1990	1	11	11	7	3	2	9	2	4	0	0	6	2	6	11
1995	1	8	9	7	4	8	12	11	7	0	1	9	4	3	12
2000	10	38	46	31	17	24	38	39	29	11	10	26	17	29	57
2005	27	55	59	40	24	39	55	49	47	10	36	49	44	37	78
2010	8	20	30	16	17	24	16	21	24	4	17	25	22	20	36
<b>Expressed as a % of total for the cohort (of the total number of job advertisements with OD in the title in that period)</b>															
1970's	18.18	9.09	54.55	54.55	90.91	36.36	36.36	81.82	36.36	0.00	0.00	9.09	9.09	0.00	
1980's	0.00	0.00	87.50	62.50	37.50	112.50	62.50	100.00	37.50	0.00	0.00	37.50	0.00	0.00	
1990	9.09	100.00	100.00	63.64	27.27	18.18	81.82	18.18	36.36	0.00	0.00	54.55	18.18	54.55	
1995	8.33	66.67	75.00	58.33	33.33	66.67	100.00	91.67	58.33	0.00	8.33	75.00	33.33	25.00	
2000	17.54	66.67	80.70	54.39	29.82	42.11	66.67	68.42	50.88	19.30	17.54	45.61	29.82	50.88	
2005	34.62	70.51	75.64	51.28	30.77	50.00	70.51	62.82	60.26	12.82	46.15	62.82	56.41	47.44	
2010	22.22	55.56	83.33	44.44	47.22	66.67	44.44	58.33	66.67	11.11	47.22	69.44	61.11	55.56	
<b>Combined decades</b>															
70+80's	9.09	4.55	71.02	58.52	64.20	74.43	49.43	90.91	36.93	0.00	0.00	23.30	4.55	0.00	
90's	8.71	83.33	87.50	60.98	30.30	42.42	90.91	54.92	47.35	0.00	4.17	64.77	25.76	39.77	
Since 2000	24.79	64.25	79.89	50.04	35.94	52.92	60.54	63.19	59.27	14.41	36.97	59.29	49.12	51.29	

Table 5.8 Data from the Coding of the Content of the Selected Sample of Job Advertisements (from the CIPD publications) in each Decade

The changes in the content of roles between 1970 and 2010 can be more clearly seen in Figures 5.3 to 5.6. The magnitude of the raw numbers of job roles found in each period varied considerably, so the size of the scale of the vertical access of the graphs was adjusted to provide a visual comparison of the trends. The numbers on the vertical axis represent the raw number of job advertisements found with the coded content in that decade. These figures demonstrate how the profile and priorities for OD in the UK has varied over the four decades.

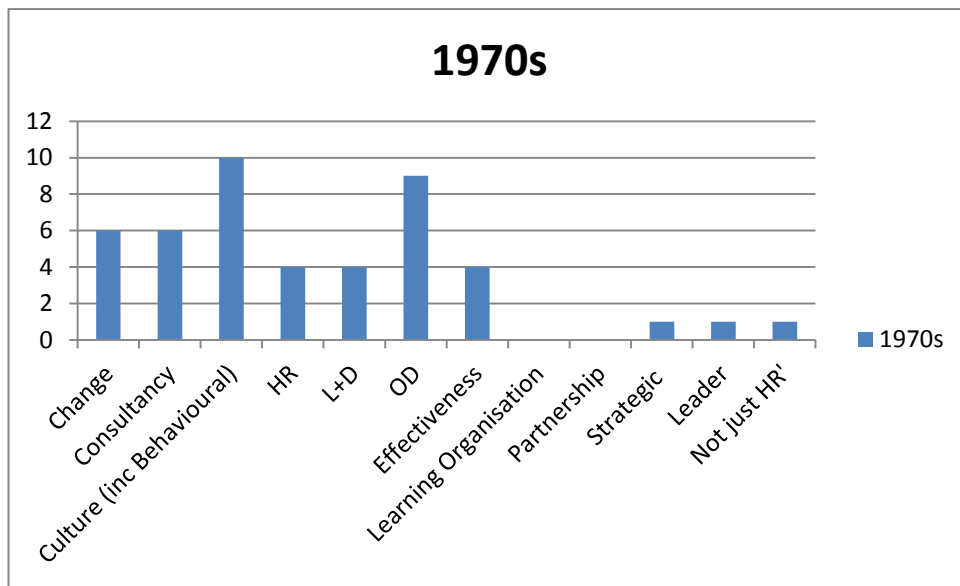


Figure 5.3 The Content Profile of OD Job Roles in the 1970s

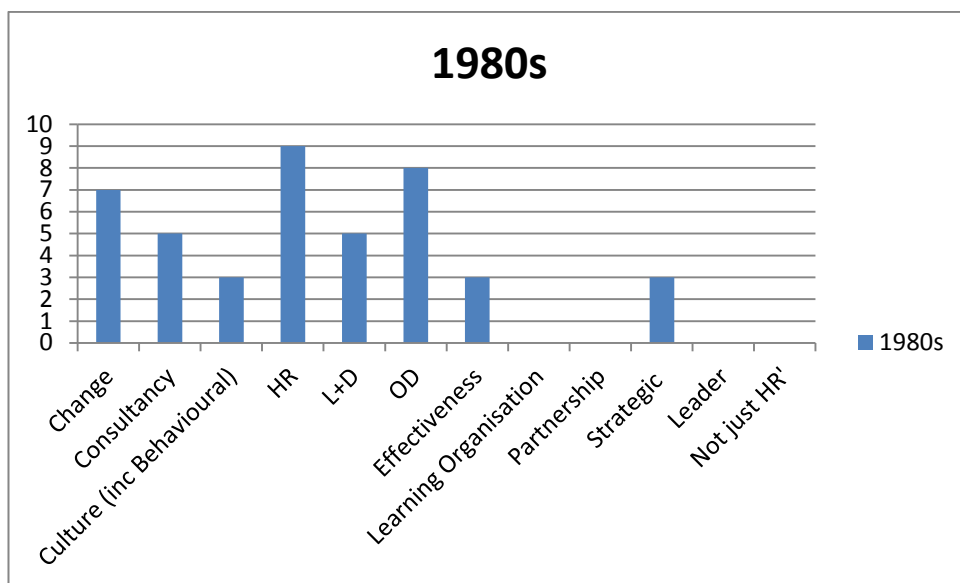


Figure 5.4 The Content Profile of OD Job Roles in the 1980s

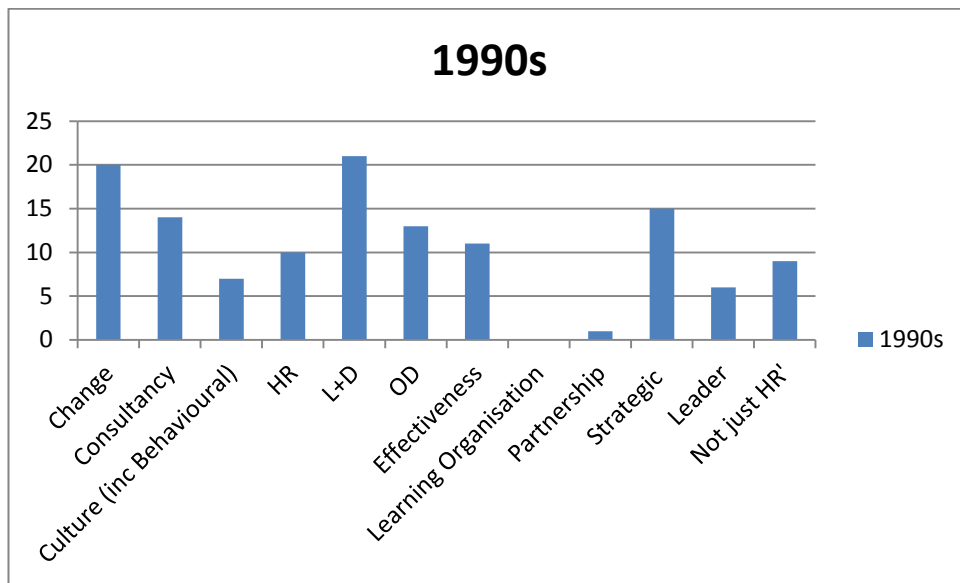


Figure 5.5 The Content Profile OD Job Roles in the 1990s

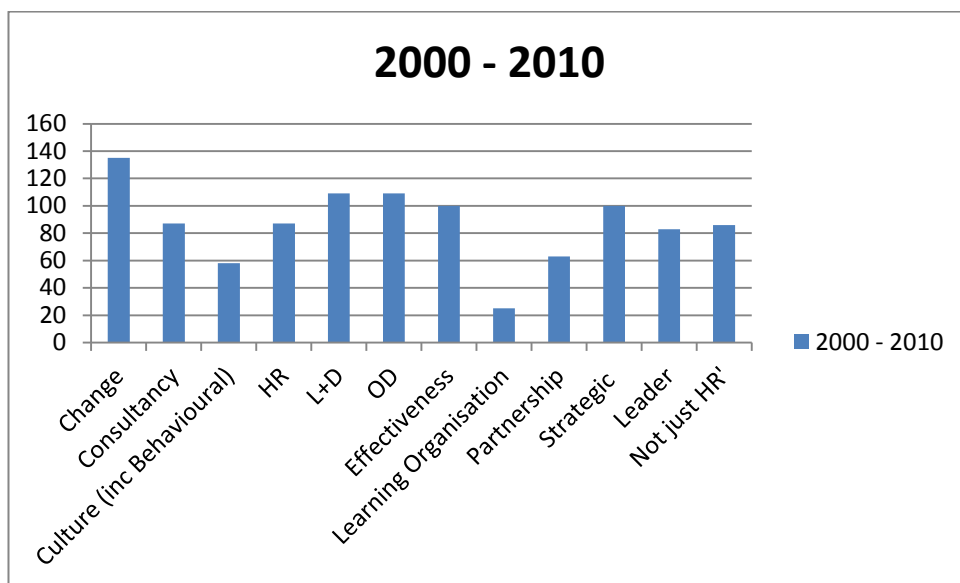


Figure 5.6 The Content Profile of OD Job Roles between 2000 and 2010

Changes in the emphasis of each of the twelve themes identified in OD job role advertisements between 1970 and 2010 will be discussed in turn below.

In relation to the importance of *Change* in OD, *Change* was not as noticeable in the OD of the 1970s despite the early traditions of OD in planned change, but grew in importance with each decade. By the 1990s only HRD (L&D) was prominent, and in

the period 2000 - 2010, *Change* had become by far the most important feature in OD job advertisements.

The importance of *Consultancy* in OD job roles remained almost constant between 1970 and 2010, with only a marginal increase in its profile post 1990.

In 1970s OD, *Behavioural and Cultural* issues were central to OD and it was the highest ranking category in job role advertisements during this time. This decreased significantly in the 1980s and 1990s, with a slight rise post 2000.

*HR* had grown from having some presence in the 1970s to being the foremost feature of 1980s OD job role advertisements. Its importance waned in the 1990s but was referred to more often in OD job advertisements again after 2000.

In 1970s OD, *HRD (L&D)* was no more important than *HR*, and there was a moderate occurrence of both in OD job roles advertised in this era. This was in keeping with the USA traditional model of OD. However its presence grew in 1980s OD and in the 1990s *HRD* in OD flourished, becoming the leading feature in OD. It remained as a significant aspect after 2000, second only to OD, and continued to be more prominent in OD job role advertisements than *HR*.

Specific mention of *OD* within OD job advertisements was high in the 1970s, coming second only to mention of *behavioural and cultural* characteristics. In the 1980s it was second only to *HR*, but had fallen back to 5<sup>th</sup> place in the 1990s. Post 2000, *OD* was second to *Change*, and equitably placed with *HRD*.

*Effectiveness* was one of the seven features of OD which was worthy of note in the 1970s, found in a moderate number of advertisements, but as frequently as *HR* and *HRD*. In the 1980s, frequency of mention of *Effectiveness* remained in a similar proportion. However, other features of OD had become more important. There was a moderate increase in the use of *Effectiveness* words and phrases in OD job role adverts in the 1990s, and a significant increase after 2000, when it ranked equal to *Strategy*, and only slightly behind *OD* and *HRD*.



There was no mention of *Learning Organisation* terms in OD job advertisements until after 2000, when the level of occurrence was low.

Mention of *Partnership* occurred first in the 1990s at a very low level, and after 2000 it was mentioned only slightly more often than *Behaviour and Culture* and *Learning Organisation*.

The incidence of *Strategy* was low in the 1970s job advertisements, grew slightly in the 1980s and doubled its presence in the 1990s; remaining at the level after 2000.

*Leadership* was barely referred to in the 1970s, not mentioned at all in the 1980s, was of low to moderate status in the 1990s. However, mention of it increased significantly after 2000.

*Not just HR* was a minor characteristic in 1970s OD, potentially reflecting the systems orientation of traditional OD at that time. OD job role advertisements in the 1980s made no mention of words in this category, although they appeared with increasing frequency during the 1990s and 2000s, when it grew to become of moderate significance.

#### **4.1.5 Summary of the Development of the Content Profile of UK OD over the Four Decades**

The profile of characteristics featured in OD job advertisements in the **1970s** was not unsurprising when compared with the USA traditional form of OD. The application of *Behavioural Science*, in terms of its appearance in job advertisements of that era, was of primary importance, followed by *OD*, *Change* and *Consultancy*. The profile of OD in the **1980s** suggested a very different beast. *HR*, *OD* and *Change* lead, with *Behavioural Science* falling much further down the agenda. In consideration of the economic and business climate of that decade, it was perhaps to be expected to find what looked like a much harder hitting approach to OD and change.

In the **1990s** the importance of *HR* in OD had fallen back, *HRD* became the leading characteristic, the status of *Change* remained very important, having a *Strategic* approach had become prominent and organisational *Effectiveness* reared its head. There were not significant differences in the profile of OD post 2000, *Change* had taken over from *HRD* as the foremost feature of OD. *Strategy* had remained important and the position of *Effectiveness* was much stronger. The presence of *HR* had increased since the 1990s and *Organisation Wide* and *Leadership* were now also features of the shape of post 2000 OD.

## **Findings from the Bibliometric Searches: Understanding the Academic Perspective of OD**

Having explored the development of OD in the practitioner world through the analysis of OD job role advertisements, the study then examined the focus of OD in the academic world. To establish how OD was perceived and presented by academics between 1970 and 2010 a series of bibliometric searches were carried out.

### **4.2.1 Web of Science Search Findings**

The first part of the bibliometric search involved using The Web of Science to search for journal articles in quality academic publications. The journals where 3 or more articles with OD in the title (hereafter referred to as OD articles) were published between 1960 and 2010, and into the 2010s, are listed in Table 5.9 below.

Journal	Number	1960s	1970s	1980s	1990s	2000s	2010s
Academy of Management Journal	4		2	1	1		
Academy of Management Review	4			4			
Administration in Mental Health	3		1	2			
Administration in Social Work	4			2	1	1	
Administrative Science Quarterly	7		5	2			
African Journal of Business Management	4					3	1
Annual Review of Psychology	4		2	1	1		
Applied Ergonomics	3			1		2	
Australasian Journal on Ageing	5					5	
Australian Psychologist	4		4				
Betriebswirt	3		3				
California Management Review	3		3				
Contemporary Psychology	12		7	5			
Education and Urban Society	5		5				
Educational Technology	8		8				
Ekonomiska Samfundets Tidskrift	3		2		1		
Exchange-Organizational Behavior Teaching Journal	8		4	4			
Futures	3				1	1	1
Gesundheitswesen	3					2	1
Group & Organization Management	4		1		3		
Group & Organization Studies	6			4	2		
Gruppendynamik Forschung Und Praxis	7		7				
Gruppendynamik Und Organisationsberatung	16					14	2
Gruppendynamik-Zeitschrift Fur Angewandte Sozialpsychologie	22			15	7		
Gruppenpsychotherapie Und Gruppendynamik	3		1		2		
Harvard Business Review	4		3	1			
Health Care Management Review	4		2	1		1	
The Health service journal	5					5	
Hospital administration	3		3				
Hospital progress	5	1	4				
Human Relations	8		4	3			1
Interfaces	3		2	1			
International Journal of Psychology	17				2	11	4
International Journal of Public Administration	3			1	2		
International Journal of Technology Management	3				2	1	
Interpersonal Development	3		3				
Journal of Academic Librarianship	5			2	1	1	1
Journal of Applied Behavioral Science	64		31	19	1	8	5

Table 5.9 Part 1: Journals with 3 or more OD Articles 1960 – 2010, and into the 2010s

Journal	Number	1960s	1970s	1980s	1990s	2000s	2010s
Journal of Applied Psychology	5			3	1	1	
Journal of Business Ethics	3				2	1	
Journal of College Student Development	3		1	1	1		
Journal of Educational Administration	3		3				
Journal of Educational and Psychological Consultation	3			3			
Journal of health and human resources administration	4			4			
Journal of Management Studies	8		3	4		1	
Journal of Occupational Behaviour	4			4			
Journal of Occupational Psychology	7			7			
Journal of Organizational Change Management	3				3		
Journal of prevention & intervention in the community	4						4
Library Trends	6					6	
Long Range Planning	3			3			
Maintenance Management International	3			3			
Management Learning	5				2	1	2
Nordisk Psykologi	3		3				
Organization Studies	5			5			
Organizational Dynamics	9		5		3	1	
Personnel	9		6	3			
Personnel and Guidance Journal	4		3	1			
Personnel Journal	13		12	1			
Personnel Psychology	48		18	14	11	4	1
Personnel Review	11		4	5	2		
Professional Psychology	6		6				
Psychology	5		1	1	3		
Psychology in the Schools	3		2			1	
Public Administration and Development	4			2		2	
Public Administration Review	4		3	1			
Public Personnel Management	9		5	3	1		
Quality & Safety in Health Care	3					1	2
Relations Industrielles-Industrial Relations	7		6		1		
Revista De Cercetare Si Interventie Sociala	3						3
Sykepleien	4		2	2			
Systems Practice	4		1		3		
Thrust-for Educational Leadership	3		3				
Training and Development Journal	34		17	17			
Unternehmung-Schweizerische Zeitschrift Fur Betriebswirtschaft	4		1	3			
Zeitschrift Fur Padagogik	4					3	1

Table 5.9 Part 2: Journals with 3 or more OD Articles, 1960 – 2010, and into the 2010s continued.

The data shows that the USA-based *Journal of Applied Behavioural Science* published the highest number of OD articles (articles with "Organization\* Development" in the title) (n = 64) in the time frame examined. Given the history, nature and community for this journal, which is the official journal of the NTL, this result was not a surprise. *Personnel Psychology* published the next highest number of OD articles (n = 48), again reflecting the *Behavioural Science* orientation of traditional USA based OD. The *Training and Development Journal* published the next highest number of OD articles (n = 34). A German based journal

*Gruppendynamik-Zeitschrift Fur Angewandte Sozialpsychologie* was published the next highest number of OD articles (n = 22). This finding was surprising as German

based scholars are not referred to in writing on OD nor mentioned by any of the interviewees. Following on from this, and linked to the focus of this study on the development of OD in the UK, the country of origin was examined for journals with 6 or more OD articles between 1960 and 2010. The results of this analysis are outlined in Table 5.10.

The data shows that the country with the greatest number (n = 15) of journals with 6 or more OD articles was the USA and with 1 other from North America (Canada), reflecting the US origins of OD. The country with the second largest number of journals with 6 or more OD articles, was the UK (n=4). Again, Germany featured in the data, with 3 publications which had published 6 or more OD articles, with a total of 45 OD articles, the German based journals outnumbered the OD articles published in UK journals (n = 32).

Country of Publication	Journal	Number	1960s	1970s	1980s	1990s	2000s	2010s
USA	Administrative Science Quarterly	7		5	2			
USA	Contemporary Psychology	12		7	5			
USA	Educational Technology	8		8				
USA	Exchange-Organizational Behavior Teaching Journal	8		4	4			
USA	Group & Organization Studies	6			4	2		
Germany	Gruppendynamik Forschung Und Praxis	7		7				
Germany	Gruppendynamik Und Organisationsberatung	16					14	2
Germany	Gruppendynamik-Zeitschrift Fur Angewandte Sozialpsychologie	22			15	7		
USA	Human Relations	8		4	3			1
UK	International Journal of Psychology	17				2	11	4
USA	Journal of Applied Behavioral Science	64		31	19	1	8	5
UK	Journal of Management Studies	8		3	4		1	
UK	Journal of Occupational Psychology	7			7			
USA	Library Trends	6					6	
USA	Organizational Dynamics	9		5		3	1	
USA	Personnel	9		6	3			
USA	Personnel Journal	13		12	1			
USA	Personnel Psychology	48		18	14	11	4	1
UK	Personnel Review	11		4	5	2		
USA	Professional Psychology	6		6				
USA	Public Personnel Management	9		5	3	1		
Canada	Relations Industrielles-Industrial Relations	7		6		1		
USA	Training and Development Journal	34		17	17			

Table 5.10 Country of Origin of Journals Publishing 6 or more OD Articles between 1960 and 2010 and into the 2010s.

A key focus of this study compares academic and practitioner perspectives and it is therefore important to understand trends in the interest level in OD by examining changes in volume of publishing over the decades. Table 5.11 shows the total

number of articles published in journals with 3 or more OD articles published in them:

Decades	1960s	1970s	1980s	1990s	2000s	2010s
Total Numbers	1	212	159	60	77	29

Table 5.11 The Profile of Journal Article Publications over the Decades

(Taken from the total number of articles published in journals with 3 or more OD articles published in them – data extracted from Table 5.9).

Table 5.11 shows the total number of OD articles published in journals which had published 3 or more OD articles, was at its highest in the 1970s, declined from the 1980s, and rose slightly after 2000. The number of publications for post 2010 is given, but since this decade is still underway, the figure of 29 relates only to part of the decade.

Looking at the profile of ALL OD articles published, including those in journals which had published less than 3 OD articles, a similar trend can be found. The results from in overall numbers from this search are detailed in Table 5.12 below.

<b>19060s</b>	<b>1970s</b>	<b>1980s</b>	<b>1990s</b>	<b>2000</b>	<b>Since 2010</b>
3	311	262	168	180	97

Table 5.12 The Profile of the Number of ALL OD Articles Published.

Overall, the data shows that a small number of academic OD articles were published in the 1960s, with a large increase from the 1970s, followed by a gradual decline until 2000, when there was resurgence in OD academic publication. This trend was therefore evident in publications with both fewer than and more than 3 OD articles published between 1960 and 2010.

Identifying whether this trend in publication over the decades is similar for the three main countries of publication (the USA, the UK and Germany) is also of interest. Table 5.13 below shows the trends in the USA, the UK and Germany, between 1970 and 2010.

	1970s	1980s	1990s	2000s
USA	128	75	18	19
UK	7	16	4	12
Germany	7	15	7	14

Table 5.13 OD Articles Published in the USA, the UK and Germany between 1970 and 2010

The number of OD articles published in the UK and Germany followed a similar trend, with a small number of articles published in the 1970s; an increase in publications in the 1980s; a decrease in the 1990s, albeit with a more dramatic drop in the UK; and then an increase in publications from 2000. However, the trend differs in the USA with the number of publication at its highest in the 1970s; dropping dramatically in the 1980s and again in the 1990s; and with a negligible rise in publication through the 1990s and 2000s.

What then of the trends in the *Human Relations* journal notable for its link to those who founded the field of OD? The list of the 8 publications published in *Human Relations* can be found in Appendix 5.1. In terms of volume, the trend matched with that found in the wider publication list. There were 3 articles in the 1970s, and there were also 3 in the 1980s, but these were all in the earliest part of that decade (i.e. by 1983). There was 1 publication in the early 1990s and finally 1 in 2012. Two of the articles focused on the evaluation of OD but in the main, as one might have expected for a high ranking journal, they were, with the exception of the last review article, all driven by theoretical rather than by practice concerns.

#### 4.2.2 Findings from the Copac search

The Copac search was restricted to books and the initial intention was to collate the findings in a similar manner than for the Web of Science and practitioner search findings. However, it became apparent that presenting trends in volume across the decades, country of origin and key authors would be problematic. The areas of methodological challenge were discussed previously in Chapter 4.

The publication identified as being the first text with OD in the title (hereafter referred to as OD text) was the Harvard Business School series in 1964. Authors on

OD in the 1960s included Richard Beckhard (1969), Warren Bennis (1969), Robert Blake and Jane Mouton (1969) and Edgar Schein (1969).

The Copac search data was used to identify authors who published several OD texts. Table 5.14 below contains authors who have four or more OD texts. This data includes publications which may have been republished in later editions.

References for this table are contained in Appendix 5.2



Author	Number of Texts	Year range of publication	Co-authors on any of these texts?	Others issues of note
Brown	4	2004 - 2014 (10 years)	Harvey (1)	These are all on the experiential approach to OD and appear to be editions of the same text
Burke	10	1972 – 1994 (22 years)	Hornstein (1)	The two 1987 texts may be the same text
Cummings	10	1980 – 2009 (19 years)	Huse (1) Worley (7)	There are other texts which do not appear on the Copac search. Cummings' text (with Worley) 'Organisation Development and Change' is on its 10 <sup>th</sup> edition (published 2015, with previous copyright in 1994, 2000, 2004 – these were not included in the Copac search). There is also a 9 <sup>th</sup> International Edition. So the 10 listed in the number of texts column is likely to be an underestimate.
French	19	1971 – 2005 (24 years)	Bell (14 texts) Hellriegel (1) Zawacki (5)	From the 19 listed, there appear to be 3 texts which recur and are therefore likely to be updated editions of the same text. Zawacki is only co-author on texts that Bell has also co-authored.
Golembiewski	7	1978 – 2008 (30 years)	Ebrary (1) Eddy (1) Varney (1)	
Harvard Business School	4	1964 – 1976 (12 years)		4 part series on OD
Harvey	7	1976 – 2001 (25 years)	Brown (7)	These appear to be earlier editions of the 3 texts listed above as being authored by Brown alone.
Jackson	6	1987 – 2006 (19 years)	Manning (2)	
Margerison	4	1973 – 1982 (9 years)	Hunter (2) Drake (1) Kakabadse (1)	Drake is co-author on a text which also has Hunter as a co-author.
Margulies	4	1971 – 1982 (11 years)	Adams (1) Raia (3)	Two of the texts with Raia appear to be editions of the same text
Rothwell	4	1995 – 2011 (16 years)	Ebrary (1) Stavros (1) Sullivan (2) McLean (1)	McLean is co-author on a text which also has Sullivan as a co-author.
Schmuck	5	1971 – 1994 (23 years)	Miles (1) Runkel (3)	These are all on the subject of the use of OD in Schools
Varney	4	1976 – 1994 (18 years)	Voss (1)	

Table 5.14 Authors who have Published 4 or more OD texts.

In terms of number of OD texts published, French (mainly with Bell) has been the most prolific author, with Cummings (mainly with Worley) being the next most published and Burke also being highly published. With regards to the range of dates, most of the authors had a date range publication exceeding at least one decade. Golembiewski published texts over 3 decades, with Burke, French, Harvey and Schmuck all publishing OD text over a period of more than 2 decades.

In terms of location, although some OD texts had UK publication details, all but one had USA editions and were written by USA based authors. The one exception was the UK based author Dr Charles Margerison, whose text was published in Bradford, UK. Dr Margerison's text focused on management development as OD, whereas the USA texts tended to be based on the traditional USA OD.

Whilst volume and time span of presence in publishing were indicators of importance, they did not account for authors who may have published OD texts less frequently, but whose work was nevertheless highly influential.

A Google Scholar search was conducted, identifying thousands of cited texts. The most cited works, with 3905 citations, were the editions of Cummings and Worley's text *Organisation Development and Change*. French and Bell's 1973 *Organization development: Behavioral science interventions for organization improvement* was listed as having been cited 2894 times; Schein's 1969 *Process consultation: Its role in organization development* was reported had 2367 citations; Beckhard's *Organization Development: Strategies and Models* had 1404 citations; *Organization Development: Its Nature, Origins, and Prospects* by Bennis (1969) had 947 citations. However, caution about citation data is required as newer publications, which might become more influential, have not had sufficient time to build their citation count.

#### **4.2.3 Practitioner Library Search**

Given the focus on comparing academic and practitioner perspectives, resources selected for collection in the CIPD practitioner library catalogue were also

examined. Year and type of publication were counted and categorised as academic book, academic journal, practitioner book, practitioner journal or report. If the book was authored by a recognised academic or its description was for use as a student textbook, it was categorised as an academic book. If the book summary focused on OD being *put into practice in an organisation*, it was categorised as a practitioner book.

The split between academic and practitioner journals was less clear than for the categorisation of books. Therefore, a note was made as to the specific journal and how it was categorised (see table 5.15 below). The classification could be allocated in a different way, but the process used in this work is noted for the purposes of transparency and replicability.

Journals categorised as Academic	Journals categorised as Practitioner
<i>Human Resource Development International</i> <i>Human Resource Development Quarterly</i> <i>Human Resource Management</i> <i>Human Resources Planning</i> <i>International Journal of Training and Development</i> <i>Journal of Change Management</i> <i>Long Range Planning</i> <i>Organizational Dynamics</i> <i>Personnel Review</i>	<i>HR Magazine</i> <i>Organisation and People</i> <i>Strategic HR Review</i> <i>Workspan</i>

Table 5.15 Categorisation of Academic/Practitioner Journals.

The earliest text found in the practitioner library was an academic text from 1968 by Blake and Mouton. The next oldest 8 texts were also academic, and the oldest practitioner text found in the library was dated 1989. Table 5.16 below summarises the number of academic and practitioner books and journal articles found in the CIPD practitioner library holdings.

	Academic Book	Academic Journal	Practitioner Book	Practitioner Journal	Reports	Total
<b>Year</b>						
<b>1968</b>	1					<b>1</b>
<b>1969</b>	2					<b>2</b>
<b>1971</b>	1					<b>1</b>
<b>1982</b>	1					<b>1</b>
<b>1987</b>	1					<b>1</b>
<b>1988</b>	2					<b>2</b>
<b>1989</b>	1		1			<b>2</b>
<b>1991</b>	1					<b>1</b>
<b>1993</b>	1					<b>1</b>
<b>1994</b>	1	1	1			<b>3</b>
<b>1995</b>			1			<b>1</b>
<b>1997</b>					1	<b>1</b>
<b>1998</b>		1	1			<b>2</b>
<b>1999</b>	2	2			1	<b>5</b>
<b>2000</b>	1		2			<b>3</b>
<b>2001</b>		3	3			<b>6</b>
<b>2002</b>	1	2	2			<b>5</b>
<b>2003</b>		1	1	1		<b>3</b>
<b>2004</b>			1			<b>1</b>
<b>2005</b>	2			1		<b>3</b>
<b>2006</b>			1			<b>1</b>
<b>2007</b>			1	2		<b>3</b>
<b>2008</b>		1	2			<b>3</b>
<b>2009</b>	1	1	2	1	2	<b>7</b>
<b>2010</b>		3			1	<b>4</b>
<b>2011</b>			2		1	<b>3</b>
<b>2012</b>	1					<b>1</b>
<b>2013</b>					1	<b>1</b>
<b>Total</b>	<b>20</b>	<b>15</b>	<b>21</b>	<b>5</b>	<b>7</b>	<b>68</b>

Table 5.16 Number of Academic and Practitioner Books and Journal Articles in the Practitioner (CIPD) Library Holdings.

Whilst conclusions from the findings are limited by this being a comparatively minor library holding, it was the most relevant practitioner library that might provide a broad understanding of trends in practitioner literature on OD. Of interest for this

research are academic and practitioner publication trends over the decades under study, which are summarised in Table 5.17 below.

	Academic Publication	Practitioner Publication
Pre 1970	3	0
1970 – 1979	1	0
1980 – 1989	5	1
1990 – 1999	9	3
2000 – 2009	13	20
Post 2010	4	2

Table 5.17 Number of Academic and Practitioner OD Publications, 1970 to post 2010

7 reports, 5 of which were post 2000, were not included in the figures in Table 5.17. Arguably, these 7 reports were written with the practitioner community in mind. However, it could also be argued that they were written by quasi academic bodies: The Institute of Employment Studies and Roffey Park.

Table 5.17 shows that from pre 1970 until the end of the decade, academic publications outnumbered practitioner publications. This trend changed after 2000 when practitioner publication numbers outnumbered academic publications.

As has previously been investigated in the Web of Science and Copac searches, it is important to note any national differences in recognition of OD by academics. Given that there may have been a difference in the status of OD between UK and USA based academics, it was of note that all earlier academic books in the CIPD library, up until as late as 1998, were authored by USA based academics see Table 5.18.

Pre 1998 Academic Books	Author(s)
1968	Blake and Mouton
1969	Beckhard, Bennis
1971	Argyris
1982	Lippitt
1987	Burke
1988	Greiner, Schein
1989	French and Bell
1991	Glassman and Cummings
1993	Cunningham
1994	Burke

Table 5.18 Authors of pre 1998 Academic Books in the CIPD Library Holdings

Post 2000, two quasi academic sources (The Institute of Employment Studies and Roffey Park) were found to be active in publishing on OD, often in the form of reports (presented in Table 5.19). When compared with all other academic books and journals in the CIPD library catalogue, it was notable that together, between 2005 and 2013, they had 8 publications when compared with the 9 from all other academic sources.

	Institute of Employment Studies	Roffey Park		Academic Book	Academic Journal
2005				2	
2006					
2007		1			
2008		1			1
2009	2	1		1	1
2010	1				3
2011	1				
2012				1	
2013	1				

Table 5.19 Numbers of OD publications from The Institute of Employment Studies, Roffey Park, and Mainstream Academic Publishing (post 2005)

## Conclusion

The first significant finding in this chapter is the extent of growth of OD job roles in the UK and the high status of OD as a specialism within the HR field. Also of note is how the content of the UK job roles developed over each of the four decades. An

examination of how these findings compare with the key themes identified in the literature review will be conducted in the discussion chapter.

The findings also show that USA scholars dominated the field of thinking on OD, with UK and German scholars also being prominent. At the founding of OD, and as late as 1998, leading authors were primarily USA based. However, whilst there was a resurgence of OD publications in the UK and Germany, the recovery in publication levels was less strong in the USA. Furthermore, some of the growth in publications in the UK was more practitioner oriented, perhaps in response to practitioner demand rather than being led by academics.

## Chapter 6. Findings from the Semi Structured Interviews

### Introduction

This chapter reports on the findings from the semi-structured interviews conducted with the twenty one participants whose details are listed in Appendix 4.1. As explained in Chapter 4, the aim was to elicit a range of opinions across practitioner and academic communities. To this end, in depth discussions were held with ten practitioners, eight academics and three leading influencers. These generated a rich and complex set of material which gave depth to the data examined in the previous chapter. This material is discussed according to the themes set out in the literature review. This does mean that on occasion similar topics are treated from a slightly different angle. The topic, for example, of the relationship between OD and variants of HR is treated in both sections 6.5 and 6.6 (in which it adds to the understanding of forces at work in the *why* OD has developed in the way it has) below. However, this is felt to be necessary to respect the richness and diversity of opinions presented. Those opinions differed based on both experience and career position, so in each section the different views emanating from the separate communities are given due consideration. The chapter concludes with a summary of the main points from the interviews, which is then carried forward for comparison with other data in the following chapter.

### Definition, Blurred Boundaries and Confusion

The difficulties of defining OD due to its broad nature, which were discussed in chapter 3, were also reflected in interview responses. Responding to the question '*How would you define contemporary OD?*', 10 of the 21 interviewees described characteristics of OD as being Change Management (SENIOR PRACTITIONER 4, ACADEMIC 2), HRD (SENIOR PRACTITIONERS 4 and 6, ACADEMIC 2), strategic integration (SENIOR PRACTITIONER 6, ACADEMIC 3), leadership (ACADEMIC 2), culture (BUSINESS LEADER 1, ACADEMIC 3) and action research (ACADEMIC 8).



LEADING INFLUENCER 1 explained that OD projects could involve elements of strategy, consideration of context, cultural shifts, the development of constructive cultures and organisational and individual learning. ACADEMIC 7 considered OD to be involved in organisational structure, training and development and communications. All of the four business leaders (BUSINESS LEADERS 1, 2, 3 and 4) concentrated on the issue of alignment of people with the business. However, most of the interviewees found it difficult to provide a clear response to the question, with many answers not fitting well with any traditional definitions of OD.

ACADEMIC 3 proposed that the lack of clarity resulted from the blurring of boundary between OD and HR, saying that: *'I think that OD has become much more blurred as a discipline ... The most significant is the blurring in being adopted as a part of HRM. It is no longer a separate and distinct field of study'*.

SENIOR PRACTITIONER 4 explained that his recent educational experience of OD had included an exploration of *'what is OD'*, with course interviewees sharing experiences, discovering that they had: *'been doing OD, but had been unsure as to whether that was the right label before'*.

ACADEMIC 1 further explained that she struggled to understand the difference between OD and having a strategic approach to HR. SENIOR PRACTITIONER 6 identified herself as an HR professional, but with OD as a specialism. ACADEMIC 1 and SENIOR PRACTITIONER 1 considered that in some cases OD functioned as a different title for what was effectively HRD practice. ACADEMIC 3 commented on the fuzzy margins between OD and Change Management in the literature. LEADING INFLUENCER 2 and SENIOR PRACTITIONER 6 both remarked on the confusion between OD and organisation design, the extent to which, and how, they were related.

Commenting on the confusion over the definition of OD, BUSINESS LEADER 2 noted that:

*'There is still a mystique with OD. Even in the mix of labels it is confusing: OD, organisation development, organisational development and organisation design – it is not clear what the differences are ...' (in company name) '... there was an OD guru (based in America) who was spoken about in hushed tones. It took me six months to even ask what OD was'.*

SENIOR PRACTITIONER 1 noted that whilst those in HRM, HRD and OD might care about its definition that managers didn't give 'two hoots' about OD 'as a name tag' and SENIOR PRACTITIONER 6 considered the OD label to have been 'used and abused'. ACADEMIC 3 judged that OD had lost any status as a separate profession by becoming 'morphed into' HR. SENIOR PRACTITIONER 4 referred to OD as being a rather nebulous term, and ACADEMIC 4 explained the French and Bell OD text (a text book often used to teach OD) had provided him with some clarity about its definition. However, ACADEMIC 4 highlighted that even after finishing an MSc programme in OD he still wasn't sure what it was:

*'... our lecturer challenged us to agree 'what OD is' before we went off to the pub to celebrate. It took ages and delayed our visit to the pub for some time! ... The field of OD is full of ambivalence and vagueness'.*

This experience was echoed by another interviewee with an MSc in OD (SENIOR PRACTITIONER 5) who stated it had taken her eight years to understand what OD was, and that she thought there was confusion about what OD was and a diversity of definitions, for example amongst HR Directors.

LEADING INFLUENCER 1, ACADEMIC 3 and SENIOR PRACTITIONER 4 referred to OD as being different things to different people in different contexts. In presenting workshops on OD, LEADING INFLUENCER 1 provided participants with sixty different definitions of OD, and asked them 'to decide which they think is the right one for them'. SENIOR PRACTITIONER 4 identified a key problem with clarity on the definition of OD when he likened it to: *'... an elephant, if you are looking up close at the tail end, what you see is a very different picture than if you are looking from up close to the ears or trunk'.*

Whilst many interviewees were keen for definitional confusion to be minimised, and to have definition of the activities related to being a legitimate OD practitioner,

an alternative view was expressed by SENIOR PRACTITIONER 2. Highlighting that the modern business world existed in a context of ambiguity, dilemma and contradiction, he felt that it was better to accept that it was normal for that to have an impact of that on the nature of OD, rather than to waste time and energy seeking certainty and stability.

## Development through History

### 5.3.1 Early OD

ACADEMIC 4 talked at length about the history of OD as it was his area of research interest. He also noted that that in addition to often documented accounts of Lewin, less often noted is that Lewin, Lippett and Likert were all Presidents of The Society for the Psychological Study of Social Issues, founded in 1936. This organisation was very influential on government policy.

Through his research ACADEMIC 4 had found that the Blake and Mouton grid was instrumental in developing perspectives on OD. The use of questionnaires and surveys were important in the establishment of OD and with early OD large scale organisational analysis came to the fore. He also referred to the use of encounter groups / T groups.

### 5.3.2 1960s and 1970s

None of the interviewees were in a position to have had personal work experience prior to the late 1960s. ACADEMIC 2 had the earliest experience of OD through study for his undergraduate and postgraduate subject in the domain of psychology. His earliest work experience in OD was also drawn from that subject foundation, and related to the traditional USA form of OD and its roots in behavioural science. His first employment in OD in 1966 was with the US owned company Esso, and he remarked that: *‘the influence of the National Training Laboratory and the Tavistock Institute was also evident at that time’*.

SENIOR PRACTITIONER 1 was involved in OD in the late 1970s, and also had a behavioural science background and oil industry first experience of OD. Trained at the Tavistock Institute, he described OD as '*... seeming to be an interface between psychology and training ...*'.

### 5.3.3 1980s

Many of the interviewees commented on the nature of OD in the 1980s, and especially the late 1980s. This increase in awareness may have resulted from knowledge of OD becoming more widespread at this time. However, the age of interviewees may have also affected this, as many would not have commenced their careers until the 1980s.

BUSINESS LEADERS 1 and 2 commenced their careers in the early 1980s by completing year-long post graduate CIPD accredited personnel management programmes. BUSINESS LEADER 1 specifically remembered studying OD in the course, but BUSINESS LEADER 2 had no memory of this. Her first memory of encountering OD was when working for a large US organisation based in a large manufacturing plant in the UK in 1984. As with the interviewees with OD experience in the 1960s and 1970, her first experience of OD was in a context influenced by a US company.

ACADEMIC 8 recounted his early OD teaching experience on an MBA programme in the early 1980s, where he used (traditional USA form of OD) '*French and Bell as the core text*'. He noted that '*...it didn't particularly resonate with me though*'.

ACADEMIC 3 also noted that when teaching the USA traditional form of OD in an MSc Occupational Psychology course, she didn't consider it to be meaningful to her at that time.

ACADEMIC 4 commented that his Master's Degree in OD in the mid-1980s: '*had a couple of Personnel Management modules, a couple of Organisation Behaviour modules, Research Methods, a couple of residential skills workshops and Group Dynamics exercises once a week*'. However he noted that: '*Change Management*

*was not really current at that time, so there was no emphasis on that. It really was OD delivered by those who were committed to traditional OD’.*

ACADEMIC 4 then described that in his second job role, after he completed his Master’s programme, that the OD function included Management Development, TQM and the introduction of new major information systems. He explained that it had remained like that until there was a large scale re-organisation with decentralisation (ACADEMIC 4).

ACADEMIC 5’s first OD related work assignment was in the late 1980s, whilst teaching Change Management and using a USA text on Organisational Behaviour. Although much of the content of the text related to traditional OD, she remembered less of a system wide emphasis and more focus on the individual and team work.

LEADING INFLUENCER 3 had his first step into OD in the late 1980s. Transferring to consultancy from a psychoanalytic psychotherapist career, he was aware of the use the term OD. Given his base in The Tavistock Institute, combined with his professional background, one might expect some alignment in his practice to that of traditional form of OD practice.

The experiences of interviewees who had encountered OD in the 1980s were dominated by the traditional form of US influenced OD. However, in the late 1980s interviewees’ experience of OD changed somewhat, and the influence of UK economic environment factors was beginning to show. LEADING INFLUENCER 1’s path to OD was driven by a quest to seek answers to her work context of the late 1980s. Working in a Management Development role for a US financial company in the UK, she reported that:

*‘There was a lot downsizing in the late 1980s / 90s – and it was an era when management gurus were particularly influential’ (my company) ‘... did not make radical changes, they lost c200 people ... but it was such a shock to everyone, including those who survived. It also had a significant effect on the reputation of the organisation and the way it was viewed. At that point I*

*would not have known it as OD, but I had started to read around the work in the USA and NLP* (LEADING INFLUENCER 1).

She explained that in the UK in the 1980s and early 1990s the general trend was for HR Directors to become *'more macho in style'*, with HR becoming more focussed on business needs and with people more likely to be viewed as dispensable commodities (LEADING INFLUENCER 1).

The addition of quality initiatives were considered as being part of OD in the 1980s. ACADEMIC 4 mentioned TQM and SENIOR PRACTITIONER 2 remembered being in a quality team and being told that *'what we were doing was OD'*. He added that *'... OD was viewed as a hippy thing at that time ... at the same time Investors in People, Quality Circles and EFQM were also in vogue'* (SENIOR PRACTITIONER 2).

#### **5.3.4 1990s**

References to traditional US OD in the 1990s were made in the interviews, but diluted by other features of people management in the UK business context of the era. LEADING INFLUENCER 1 mentioned that whilst her interest in OD continued during the 1990s, the influence of the UK people and employment agenda was also present: *'... HRM was really developing as a discipline, it was very much governed by the perceived need to align with the business focus and then moving forward into the Business Partner role of HR'*(LEADING INFLUENCER 1).

Her perspective was that a *'planned change'* approach to OD prevailed and that even though it involved short term cost savings, planned change on its own did not *'stick'*. ACADEMIC 4 remarked that the need to address cultural aspects of change resulting from large scale privatisation became more prominent in the 1980s and 1990s.

HRD was raised by many of the interviewees as having appeared as a new characteristic of OD in the UK in the 1990s. HRD was sometimes referred to in an unconscious manner, as though it had an assumed place in OD, or was even assumed to *BE* OD. For example, in referring to his initial awareness of OD in the

NHS in 1993, BUSINESS LEADER 4 also automatically referred to HRD activity: *‘...I would have been familiar with the terminology of ‘training’ / ‘in service’ department in terms of CPD ... there was an OD function within the HR Department’*. SENIOR PRACTITIONER 3 also noted that there was *‘there was a mention of Learning and Development and OD then’* in her post graduate qualification in HR, although she wasn’t aware of OD in practice for some time after. However, she was aware of job advertisements for OD roles at that time.

In the context of a US owned company, HRD had become linked with OD in the 1990s, and SENIOR PRACTITIONER 4 recalled that during this time his first memory of OD was in using the terminology / label of OD to improve and upgrade the image of HRD which otherwise was *‘... sometimes perceived as just running training courses’*. Also working in a US owned company in the 1990s, BUSINESS LEADER 2’s view of OD was that OD was not about HRD, but was about adopting a business driven perspective. She explained that there was a practitioner in her organisation who she categorized as an HR person at the time, but who she would have subsequently have classed as being in an OD role. Her view as to what differentiated this person as an OD person was that they got *‘... involved with the business to identify people issue related projects’* (BUSINESS LEADER 2).

### 5.3.5 Post 2000

Despite LEADING INFLUENCER 2 coming from an HRD background with a nationally recognised company, and SENIOR PRACTITIONER 6 coming from an HR role within a leading UK energy company, neither was aware of OD until after 2005. After graduation, SENIOR PRACTITIONER 3 worked in an HR role in four sizeable organisations consecutively. However, during that time she did not meet anyone who had an OD job title, although in the last organisation an OD practitioner had been brought in after she left.

BUSINESS LEADER 1 reported having been aware of OD for three decades, since the 1980s, and that his fundamental view of OD had not changed in the last decade, but

his understanding of it had broadened and deepened. However, when discussing OD after 2000, he noted that OD was referred to in more diverse ways.

SENIOR PRACTITIONER 3 highlighted that the application of OD was immature in her organisation. Working in an SME, she thought that they didn't need a separate OD function, but instead, needed a role focused on working across a range of people management issues. In looking across sectors, BUSINESS LEADER 2 agreed that if there was OD activity in smaller organisations, it should not be serviced by a separate OD function, but might be led by an HR Director.

BUSINESS LEADER 2 highlighted the nature of adoption of OD in the public sector, noting that there was an intellectual acceptance of OD and it was more theoretically based. She was aware that there was less emphasis on delivering effective change in the public sector, whereas in the private sector OD was required to demonstrate that effective change had been made and that value had been added (BUSINESS LEADER 2).

### **5.3.6 Reflecting Back over the Decades**

Interview responses on the development of OD since the 1970s, and its development in the decades since then, highlighted the following notable perspectives from the interviewees.

#### **5.3.6.1 The Senior Practitioner Perspective**

Completing a CIPD course on OD had helped SENIOR PRACTITIONER 4 to understand OD and how it had changed over time:

*'... We have moved from T groups to looking at different drivers and complexity, from individual and team issues to organisational wide issues in the context of effectiveness. By now using Models of Change Management and Organisational Culture models, we can have a more holistic approach'.*

He highlighted that OD practice in the last 20 years had moved away from micro focused laboratory behavioural science techniques and team functioning, to a focus where job design was less important and macro approaches were used. He also



observed that more emphasis was placed on business competitiveness, expressing concern that the application of the Ulrich model to the HR function had led to HR being less of a *'Champion of the People'* role.

#### 5.3.6.2 The Leading Influencer Perspective

LEADING INFLUENCER 3 was strong in his belief that HR had become an instrument to: *'enslave people through the application of legislation, rules, etc., and worked in the support of line management'*. He proposed that OD should be about bringing positive and constructive change to improve the working lives of individuals. He was of the opinion that convergence had occurred between OD, HRD and HR; that the nature of HR had transformed over the last 20-30 years; and that many approaches to OD had developed. He noted that the development of the OD profession had necessarily been influenced by fundamental changes in the form of organisations, as they had more permeable boundaries and functional changes.

#### 5.3.6.3 The Business Leader Perspective

BUSINESS LEADER 2 proposed that: *'... In the last 30 years there is more acceptance of OD and that it has transferred ... to the current focus of effective implementation of changes in business'*. BUSINESS LEADER 1 placed a different emphasis on what OD had become. He remarked that in his current Middle East role, alongside many other former UK CEO's, he was aware of a: *'... much stronger appreciation of OD, Organisational Change, Culture and Behaviours than would have been the case 30 or so years ago'*.

#### 5.3.6.4 The Academic Research Perspective

ACADEMIC 8 was particularly knowledgeable and involved in national research strategy and the development of policy and practice. Having been asked to provide feedback to HRD academics on their subject research rating after the Research Assessment Exercise in 2008, he advised that:

*'... as a field there is a lack of theory, that doesn't mean it doesn't have a useful place, but high ranking journals are expected to encompass theory –*

*and that is what is holding the field / discipline back. A lot of the work is case based, and it is intrinsically more difficult to build theory from. As a field it needs to think more about how it theorises and to publish in mainstream journals, positioning itself amongst a more robust peer group. The field should be looking to publish in their own journals – but also in e.g. The Journal of Management Studies’(ACADEMIC 8).*

Of particular interest is the link between publishing in journal articles and academic careers. The ranking of particular publications runs parallel with ACADEMIC 6’s comments on OD and its lack of status as an academic discipline in the UK: *‘I am not sure that OD is not much more of a practitioner type language than an academic language on behavioural sciences. I guess in my head it’s a practitioner community subject area’.*

Given the importance of the development of OD over time and the debate over definitions which reflects the debate in the literature, the next section will examine interviewees’ responses in relation to the core attributes of OD identified in Chapter 3.

## Core Attributes of OD

This section will report interview findings relating to the nature of traditional OD, followed by findings on the skills considered necessary to be an OD practitioner: the need to be able to challenge organisational orthodoxy; the relationship between Change Management and OD; consultancy in OD; and OD’s role in behaviour and culture issues. Respondents’ responses on effectiveness, leadership, organisation wide and strategic perspectives, and issues of partnership and engagement will also be examined.

### 5.4.1 Traditional OD

The responses in relation to traditional OD tended to be indirect. Elements of traditional OD were referred to by mention of OD systems or processes, rather than by specific mention of traditional OD in itself. With few exceptions, interviewees’ rhetoric suggested that they did not know of *traditional OD* as a core form of OD.

However, ACADEMIC 4 did use the term '*traditional OD*' and SENIOR PRACTITIONER 5 had attended a UK based NTL programme which included explicit elements of traditional OD, such as entering and contracting diagnosis, interventions, shifting team culture and planned change and other '*conventional classic OD processes*' such as having a system wide approach.

LEADING INFLUENCER 1 mentioned that Mae-Yan Cheung-Judge was the Dean of this UK NTL programme, describing her as the most eminent and rounded OD guru / practitioner in the UK, noting that she had studied '*at the feet of the masters*'. Cheung-Judge did her PhD in OD in the USA and '*had the opportunity to learn from Edgar Schein*'. She had, through the NTL programme, trained many OD practitioners. LEADING INFLUENCER 1 also described Cheung-Judge as being highly visible as the foremost expert in OD in the UK, with a strong influence on the development of contemporary OD thinking in the UK.

SENIOR PRACTITIONER 4's description of the CIPD programme on OD also made mention of traditional OD which he said placed '*emphasis on the contracting / entering process*'. LEADING INFLUENCER 3 noted that his consultancy organisation's approach followed the '*entering and contracting, diagnosis, intervention and evaluation / feedback cycle*'. ACADEMIC 5 described a shift in ontological thinking in OD, but did not include reference to practice in this development

SENIOR PRACTITIONER 1 made reference to T groups, describing them as an approach that was widely criticised. SENIOR PRACTITIONER 5 also referred to T groups in the NTL programme which involved a T group exercise and training on group processes, consulting and team coaching.

The concept of systems was mentioned in the interviews by LEADING INFLUENCER 3, BUSINESS LEADER 1, SENIOR PRACTITIONER 5 and ACADEMIC 5, in relation to a system wide approach to change. BUSINESS LEADER 1 explained that the OD systems model had increasing utility for him, as he gained experience in senior executive roles.

In the main, indications of knowledge of traditional OD processes were included in responses on OD process. In what might be termed as contemporary approaches to traditional OD, three of the interviewees referred to using AI as an OD tool (SENIOR PRACTITIONERS 2, 4 and 6) and SENIOR PRACTITIONER 2's organisation had applied '*positive psychology*' in a review in conjunction with academic input. In the literature describing traditional form of OD, emphasis was placed on systematic in depth *diagnosis* after the *entering and contracting* stage (as described in chapter 3) and prior to the consideration of selecting and applying *interventions*.

SENIOR PRACTITIONER 4 and LEADING INFLUENCER 3 highlighted the importance of the traditional OD process in facilitating a challenge to organisational orthodoxy. Application of the *entering and contracting* processes, and accurate *diagnosis*, could lead to better managed expectations. SENIOR PRACTITIONER 4 noted that it was equally important to clarify what would '*not be achieved*' through adopting set processes. LEADING INFLUENCER 3 outlined how defining and contracting could be a complex process, but noted that it was essential to do it well. He added that at the *entering and contracting* step in the process, the unconscious dynamics of organisations and hidden forces became apparent if only a rational mind-set had been applied. In line with this, SENIOR PRACTITIONER 4 noted that the '*presenting problem*' was often a symptom rather than a cause, and that there was often '*an elephant in the room that requires addressing first ...*' meaning that further diagnosis was required before the contracting stage began.

Strong views on the accuracy of diagnosis was a feature of responses from ACADEMICS 1 and 6, and from SENIOR PRACTITIONERS 1, 2, and 4 who referred to the need for sound diagnosis and data. Three respondents, ACADEMIC 2, SENIOR PRACTITIONERS 2 and 4, reported on the importance of diagnosis in change processes. SENIOR PRACTITIONER 1 proposed that the route to persuading managers against quick fix changes was to challenge thinking as to what was required to make sustainable change. He proposed that this could only be achieved through the presentation of accurate data, arguing that that OD practitioners must to have strong analytical skills, such as those used in lean engineering where the

emphasis is on applying diagnosis to identify root causes. ACADEMIC 8 also reflected this need for in depth diagnosis:

*'... The real prize would be to understand that what is presented as an organisational issue is often a surrogate of deeper issues which requires change. The same can be said for implementing solutions, so for example, use IIP as the frontline intervention, but the prize is to use it to change the way that organisational strategy is developed and implemented'.*

Although few of the respondents cited use of traditional OD, those who did suggested that this was of impact on the value of their work.

#### **5.4.2 OD Skills, Attributes of Practitioners and OD Training and Qualifications**

In line with existing literature, respondents were unclear on the definition and boundaries of the discipline of OD. LEADING INFLUENCER 1 noted that in his opinion, OD was a diverse field meaning that practitioners tend to come from a range of disciplinary backgrounds and applied a range of different approaches. SENIOR PRACTITIONER 3 stated that OD required diverse experience and was therefore not a role you could do as a first job after graduating from university. LEADING INFLUENCER 3 also felt that there was a lack of clarity as to what made a 'good' OD practitioner:

*'What makes an OD person is fuzzy – and is made up of a number of things like suitable personality: a curious mind, a desire to learn and a passion for people. Personalities are so variable and different and that adds to the sense of fuzziness'.*

LEADING INFLUENCER 3 highlighted three primary components of an OD professional. First, academic study and knowledge of organisation and social theory was necessary. Secondly, OD professionals should have had '*personal psychoanalysis / psychotherapy / counselling / coaching / supervision*'. He felt that having had psychoanalysis was essential, academic study was not enough; and that although it was not normally taught in academic organisations, having a deep personal understanding of motives of self and human systems generally was essential. Finally, he proposed that an effective OD practitioner must have '*lots of years*' of consulting practice experience (LEADING INFLUENCER 3).

SENIOR PRACTITIONER 5 proposed that the qualities required to be an OD person included: *'listening, consulting, questioning, building rapport, having the ability to challenge, getting buy in and being able to look at things from outside in'*. She noted that a background in HR was useful, but that it was essential to have had serious line management experience before becoming an OD practitioner, noting that it was crucial that *'you had to have had experience of managing a difficult team yourself'*. Corresponding with this perspective was BUSINESS LEADER 1's view that the most effective OD people he knew were HR Directors who had migrated to general management positions. BUSINESS LEADER 1 commented that that OD practitioners must have technical OD skills to enable the redesign of work structures.

Having *Emotional Intelligence* is an important feature for OD practitioners. LEADING INFLUENCER 2 judged that a competent OD practitioner it was more important to be able to *'get under the skin of people, to know what makes them tick'* in addition to having technical skills in HR and OD. SENIOR PRACTITIONER 4 also believed that *Emotional Intelligence* was crucial to being an effective OD practitioner, noting that: *'If you haven't got an intuitive nature and a behavioural sensitivity, then you can't do OD. Having an analytical mind and the relevant skills are both important, but the Emotional Intelligence piece is indispensable'*. BUSINESS LEADER 2 also believed that high levels of *Emotional Intelligence* and empathy were crucial to good OD practice, reflecting that she had:

*'... never seen a good / stupid OD person. To be a good OD person you have to a certain amount of 'smarts''. Businesses and organisations and how they work is a complex issue, business and organisations are complex creatures, if you do OD you need to be able to understand that complexity'*(BUSINESS LEADER 2).

She added that OD practitioners also had to be intellectually curious, a term also used by SENIOR PRACTITIONERS 2 and 6, and that they must be interested in how various aspects of business worked as well as having a natural interest in the people aspect of business to be useful. In addition to having natural *'smarts'* she also believed that OD professionals must show a sound understanding of theory:

*'Business people can be quite snooty about that – you have to have and be able to demonstrate some theoretical depth'* (BUSINESS LEADER 2).

SENIOR PRACTITIONER 5 also believed that practitioners should work from a strong theoretical basis, noting that she could not *'bear people who wing it and use pop psychology. It staggers me how often experts get away with this'*. She thought it was also important that OD practitioners were *'authentic'*.

Despite the rhetoric from many scholars on the importance of taking a strategic approach in OD, ACADEMIC 2 argued that it was important to understand and function effectively at a micro and macro level. BUSINESS LEADER 3 noted that the skills and competencies required *'varied according to the business context e.g. start-up situations which require different technical skills'*. BUSINESS LEADER 2 AND SENIOR PRACTITIONER 3 also noted that the type of skills required varied according to business size. BUSINESS LEADER 2 noted that, that in recent years, she had heard less about OD in small to medium sized businesses, and that they tended to focus on process, and therefore were more likely to employ operational HR people.

For smaller organisations, with more holistic, flexible and converged HR functions, they had a need for practitioners with more generalist skills, whereas in larger organisations, greater scope for specialism and separation is required (BUSINESS LEADER 3). However, based on her experience of working in large organisations, SENIOR PRACTITIONER 6 thought that HR, HRD and OD were converging as disciplines. She noted that HR professionals tended to be increasingly expected to operate in the OD space, and outlined that in her organisation OD was no longer the responsibility of a small specialist team, as it had been previously.

Whatever the size of business, it was noted that OD practitioners should possess an understanding of systems and culture, good interpersonal skills and *'a helicopter mind'* (ACADEMIC 2). ACADEMIC 2 stated that an OD professional must be able to relate to, and understand, *'the detail at shop floor level, as well as putting this in context of the big picture'*. BUSINESS LEADER 2 also believed that OD practitioners

must be able to influence senior managers, middle managers, technical professionals and the full range of employees.

Interviewees commented on specific OD training and qualifications programmes (LEADING INFLUENCER 1, SENIOR PRACTITIONERS 4, 5 and 6). The practitioner responses indicated that qualifications provided professional legitimacy. However, interestingly, none of the academic respondents commented on this issue, nor on the UK based organisations currently offering OD training and qualifications.

LEADING INFLUENCER 1 indicated that Roffey Park had played a key role in leading the development of thought on contemporary OD in the UK, and that the NTL (which she said was the '*biggest provider*' of OD training), The Tavistock Institute and Ashridge were also influential. She highlighted that Roffey Park had progressed the OD agenda by disseminating its work through training and qualification provision, experimental practice, research and reference to theory, and that their approach was as much about '*mind-set shifts*' as it was about behaviour. LEADING INFLUENCER 1 had also been involved in working closely with Mae-Yan Cheung Judge who delivered the NTL programmes in the UK.

SENIOR PRACTITIONER 4 felt uncertain about the legitimacy of his skills for his specific OD role, and gave this as the reason he had decided to complete a recognised, accredited OD qualification. He was not alone in this regard, as with regards to when she had begun to feel competent in OD SENIOR PRACTITIONER 6 replied that:

*'I actually think – that if I am being totally honest – in the last 2/3 years. When I had the job title of OD – I thought – how on earth do I explain OD to others? I had a sense that I was not qualified in OD and I needed a qualification to be able to lay claim to being an OD professional, so I started the OD practitioners programme in OD ...'.*

What was of particular note amongst the senior practitioner interviewees was that those who had moved from senior HR or general management careers (SENIOR PRACTITIONERS 4, 5, 6) into specific OD roles, had completed OD specific post graduate qualifications. One (SENIOR PRACTITIONER 5) moved into an OD role after



completing a qualification and the others (SENIOR PRACTITIONERS 4 and 6) opted to take up a formal programme of study through the CIPD and Roffey Park after being appointed into OD roles with organisational responsibility. Both commented on the perceived need for formal qualifications in order to consider themselves as being legitimate OD professionals.

SENIOR PRACTITIONER 5 highlighted that she had originally thought OD was about coaching and facilitating, but that since doing the NTL course (as mentioned by LEADING INFLUENCER 1 above), she considered OD to be concerned with system wide change, and the use of tools as micro interventions which were part of a bigger picture. She was complimentary of the NTL programme, explaining that it was founded on the principles of the traditional US model of OD. She claimed that it took her eight years after completing a Masters in OD to understand OD and that the Masters alone had not yet given her the confidence to know what OD was or how to tailor it to an organisation. She clearly highly regarded the NTL programme (it was apparent in her rhetoric) and commented that having done the NTL course, her understanding of OD had changed. It was as though she considered that having completed the NTL programme she was now in the inner circle of the elite *bona fide* OD practitioners.

However, despite the perceived need for qualification, SENIOR PRACTITIONER 4 noted that there were few regulated OD education programmes in the UK, and cited the CIPD and Roffey Park programmes, but not the NTL programme, as being the only ones he was aware of.

SENIOR PRACTITIONER 4 discussed skills in terms of putting teams of people together to tackle OD initiatives. Rather than focusing on the competence of individuals, he noted the importance of having fluid teams that were structured around particular projects. He highlighted the importance of OD project team members having different tasks and rotating duties to assist in the development of skills and provide for contingencies. He described this as being like a set of building blocks in terms of team member competencies, with the configuration of these

competencies depending on the needs of the project (SENIOR PRACTITIONER 4). Given the broad and fuzzy nature of the OD discipline, considering skills on a group basis might be a more fruitful approach, rather than expecting individual practitioners to be competent across the broad range of OD practice. In a similar vein, ACADEMIC 2 noted that that OD *'could do a better to learn to from communities of practice approach'*.

Experience and knowledge of self, both themes apparent in the literature, were also addressed by interviewees. BUSINESS LEADER 2 and SENIOR PRACTITIONER 6 both reported that self-awareness was important in order to be successful as an OD professional. SENIOR PRACTITIONER 4 noted the importance of first setting up a level of psychological distance in applying OD practice, advocating that the entering and contracting process was useful in this regard. SENIOR PRACTITIONER 2 highlighted the importance of tempering personal ego, noting that this was also the case for those in senior roles as *'... Too much ego at senior levels is damaging to an organisation'*.

Only LEADING INFLUENCER 3 referred to the experience base of the OD practitioner as having its place in developing OD competence: talking about the need to differentiate between intellectual understanding and experience as they were both important. He also believed it took great skill to challenge beliefs, assumptions, values and practices in a way that a client could see and understand. The next section will examine skills in relation to the ability to challenge organisational orthodoxy in more detail.

#### **5.4.3 The Requirement to Challenge Organisational Orthodoxy**

OD practitioners ability to challenge constructively was a recurring theme in the interviews, and was viewed as being important and requiring great skill. Eleven interviewees made reference to the importance of the business context and the need for OD practitioners to *'hold their own'* (BUSINESS LEADER 2) and to challenge organisational leaders, culture, norms and wisdom.

ACADEMIC 2 noted that OD practitioners must be tenacious and resilient in order to survive. BUSINESS LEADER 3 valued practitioners who could challenge organisational norms, beliefs and culture and provide information on relevant practices outside the business. SENIOR PRACTITIONER 5 echoed the need to work *'as though you are standing on the outside looking in and having clarity of your role'* contributed to achieving that. LEADING INFLUENCER 1 had a similar view, highlighting that OD practitioners had to:

*'function outside / inside, they are able to see and express things as though they were an outsider, doing that is a risk, it can get you sacked, but it is necessary and it takes immense and rare skill to be able to do it well'.*  
(LEADING INFLUENCER 1)

SENIOR PRACTITIONER 2 identified a key aspect of the OD role as being an organisational truth seeker. To play this role effectively, SENIOR PRACTITIONER 1 advised that those who were *'embedded in the organisation were not free to do OD'*. He noted that *'OD people need to have the courage of their convictions'* and must have analytical tools to produce reliable data for accurate diagnosis, to create a firm basis for challenge, or there could be a situation in which *'... diagnostic interviews were done, but the views of many were influenced by politically placed answers rather than rational responses'*.

LEADING INFLUENCER 3 provided a more detailed account of how a necessary stance of independence and objectivity described above can be achieved, with a very particular viewpoint:

*'A well rounded OD person would not see themselves as omnipotent, they should be attuned to processes of projection and projective identification, introjection and introjective identification. There is a difference between intellect and experience. One can learn psychology, but that does not add to your own experience in the way that personal psychoanalysis does. To do OD effectively you need to have had psychoanalysis. I know that might be considered a bit radical – but I believe it with all my heart'.*

The leadership culture and character of the top leader could of course also have an influence on the ability of the OD professional to challenge organisational norms. SENIOR PRACTITIONER 4 highlighted that not all leadership cultures welcomed

challenge, noting that in some situations '*holding up the mirror*' to senior management behaviour was the most effective thing to do, and that in one context the issue was that the senior managers had to model the roles that they expected in the rest of the organisation. SENIOR PRACTITIONER 6 referred to having a new CEO, who was more open than his predecessor. This had created a context in which it was easier to challenge organisational traditions. SENIOR PRACTITIONER 3 explained that to be effective it was important to challenge the business to look at things differently, but it was also important to listen to others' views, and to be willing to accept that she was not always right.

The existence of a number of areas of tension was mentioned by three interviewees. ACADEMIC 5 advocated being open, where there were tensions (in for example, change processes), to discuss these and make them explicit. ACADEMIC 8 agreed with this approach and commented that if done well OD would lessen / remove tensions. A different type of tension was mentioned by LEADING INFLUENCER 1. She explained that there was a tension between having in mind an OD approach that would work well, but expanded that the critical OD view would be that any preconceived ideas on approaches without getting people fully involved was manipulative.

#### **5.4.4 OD and the Field of Change Management**

##### **5.4.4.1 Is Change a Prominent Feature of OD?**

It was evident from responses on the definition, nature and development of OD that the concept of change was considered as being a prominent feature, and was covered in the majority of interviews. Given the context of ongoing change in organisations, this is perhaps not surprising. Even though SENIOR PRACTITIONER 3 considered OD to be '*immature*' in her organisation, she reported a situation characterised by constant and dynamic change. In relation to the connection of OD with Change Management, LEADING INFLUENCER 3 noted that the concept of change had been part of OD from its origins: '*Kurt Lewin's founding work in OD included theory on the nature of change and resistance to change*'.

Interviewees tended to refer to Change Management in terms of it being an assumed, intrinsic aspect of OD:

*'I see it as including issues such as organisational culture, values, change, organisational fit, effectiveness, fit for future purpose. It is a change oriented role – and is involved in considering culture as part of the Change Management process'* (LEADING INFLUENCER 2) and *'The focus of OD has been almost exclusively in Change Management ...'* (SENIOR PRACTITIONER 1).

ACADEMIC 8 expressed the view that OD was linked to Change Management; it was hard to do well; and that it was easier to do well when there was a close fit between the organisational activities and its objectives. Only ACADEMIC 4 reported an incidence of Change Management not being included in OD, as his OD post graduate qualification in the 1980s did not include Change Management in the syllabus.

ACADEMIC 3 remarked on an increased focus on Change Management, and the increasingly indistinct boundaries and confusion between OD and organisational change in the literature. ACADEMIC 8 illustrated this confusion in practice, reporting that he considered OD and Change Management to be intrinsically linked. SENIOR PRACTITIONER 1 observed that he did not refer to himself as an OD practitioner, using Change Management terminology instead.

ACADEMIC 1, a mainstream HR academic, explained that she had decided to check the bookshelf of her colleague, who was involved in teaching OD, prior to the research interview. However, she reported that all she found were books on Change Management, except for one that had OD in the title; *'management and organisation development'*, which is an HRD text. She noted that she had the same types of Change Management books, so that, apart from that one exception, there was no difference in their text reference sources.

In comparing HR and OD, BUSINESS LEADER 1 took the view that HRM was focussed on the maintenance of organisations, whereas an OD approach was what was

needed for change situations. LEADING INFLUENCER 3 described this as *'HR has become a transactional activity; OD should be a transformational force'*.

#### 5.4.4.2 Hard and Soft Change and the Learning Organisation

Change Management was often referred to in the context of a differentiation between *hard* and *soft* change, with an assumption that OD practitioners were more concerned with *soft* change. Those who applied only *hard* change were criticised, with LEADING INFLUENCER 1 arguing for more constructive consideration on the impact of change on employment. LEADING INFLUENCER 3 reported being sceptical of big consultancies, who offer little variation in approach and who implement whole scale change programmes with little concern or knowledge of the interface between people and systems. Similarly, SENIOR PRACTITIONER 4 questioned the extent to which many senior managers understood the human dimensions of change, speaking scathingly of those who hire: *'... big consulting firms'(who)'peddle BPR, but without consideration of OD. It is imposed change with no real understanding of the people element'*.

Interviewees referred to the move away from the division between Change Management and OD in practice, proposing that effective and sustainable organisational change required both approaches. ACADEMIC 2 identified the main development in OD as being an integration of *soft* and *hard* approaches to change, rather than a focus on *soft* change only. He proposed using a cyclical approach, involving organisation design being applied in the start-up phase of the change process; OD techniques being used in the implementation and evaluation stage; which then fed back into the organisational learning process; and into subsequent organisation design. He referred to the *hard* approach as including *'a systems approach, business process re-engineering application of McKinsey and, in the UK, restructuring'* (ACADEMIC 2); linking these developments to *'Keith Grint's pendulum of trends in approaches to leadership'*, where there was a swing back and forth between scientific management and human relations approaches over time.

As the head of an OD function, SENIOR PRACTITIONER 5 described her team as being very much on the *soft* side of OD: concerned with culture rather than *hard* change. However, despite being less concerned with structural change:

*‘... we have made it our business to up skill our team on the design of organisational structures. We wanted to be able to ask credible questions. ... We now lobby to get more involved in organisational structure design and to bring a more humane joined up thinking approach to this’* (SENIOR PRACTITIONER 5).

The critical importance of line managers, as well as OD practitioners, in organisational change was highlighted by BUSINESS LEADER 1 and SENIOR PRACTITIONER 2. As a senior manager, ACADEMIC 3 noted that: *‘... In a rapidly changing environment ... I seek to ensure that the people and their activities and development are clearly aligned with the strategic direction of the organisation’*.

BUSINESS LEADER 2 reported a change in emphasis in OD over the last 30 years, proposing that it had shifted from a focus on theoretical pondering to focus on the effective implementation of changes in business. She argued that OD people need to understand business and business markets and to develop linking strategies in order to deliver market led change. In relation to where change processes should begin, ACADEMIC 2 highlighted that it could be driven from the top down or from the bottom up, suggesting that this could also be subject to national differences.

Even though SENIOR PRACTITIONER 1 evaluated organisational learning as being a key factor, only two interviewees raised the topic of learning organisations in relation to OD. ACADEMIC 2 argued that as with approaches to leadership and management, a pendulum operated and that the tradition of human relations had always been there, albeit waxing and waning over time. He added *‘the soft side OD has come back with the Learning Organisation Movement’* (ACADEMIC 2).

Interestingly, whilst ACADEMIC 2 linked the soft side of OD to a learning organisation approach, SENIOR PRACTITIONER 1 advocated the use of *‘diagnostic tools used in lean management’* and proposed that *‘... Data driven decision making is often lacking’*. Furthermore, he argued that the application of learning

organisation methodology assumed a rational context, which may work better in technically oriented organisations. He believed that attempting to apply learning organisation principles in the public sector did not work, since those organisations were all about politics and power, rather than rational learning (SENIOR PRACTITIONER 1).

#### 5.4.4.3 The Nature of Change Management had also developed over time

Interviewees indicated that Change Management was also a developing and changing subject field (LEADING INFLUENCERS 1 and 3). LEADING INFLUENCER 3 commented that OD was involved in wider system change: *'Wise organisations know they have to keep up with changing ideas on organisation structure and functioning. We need to look more at systemic / domain-wide change, and understand that, not just at organisational level change'*.

LEADING INFLUENCER 1 described a case from her consultancy work that highlighted how the nature of change had evolved; where the purpose of the organisation had itself changed, resulting in traditional Change Management outcomes such as a reduction in workforce numbers. More importantly, she noted that the change requirement was for *'a complete mind set shift'*. Since the organisation purpose had changed from having been a service provider to that of being a commissioning organisation, this was particularly difficult since the organisation members had previously taken great pride in quality of service. With a change in organisation purpose, the organisation members were forced to shift away from what they had previously taken self-respect from: the provision of excellent service (LEADING INFLUENCER 1).

#### 5.4.5 A Consultancy Approach to OD

Interviewees did not place a great deal of emphasis on the topic of consultancy. However, one issue which was discussed was the differentiation between different types of consultants in the form and influence of large global consultancy firms, and smaller, more specialised consultancy operations (ACADEMICS 2 and 6). SENIOR



PRACTITIONER 4 highlighted the influence of consultants in disseminating change in management practice, and ACADEMIC 4 noted that a main career destination of those from a 1980s OD Masters programme was consultancy roles, and that the contracting / entering stage of consultancy process was taught as part of the CIPD post graduate programme in OD (SENIOR PRACTITIONER 4).

The value of internal or external consultants in an organisation was the most frequently referred to issue, with ACADEMIC 2 and 8 both taking the view that there was a case for both internal and external consultancy approaches. BUSINESS LEADER 3 valued internal practitioners who *'had the ability to observe as though they were observing from the outside'*. However, SENIOR PRACTITIONER 1 and LEADING INFLUENCER 3, both in external consultancy roles, argued that OD could only be done by external consultants, with SENIOR PRACTITIONER 1 considering that internal OD practitioners self-regenerate existing culture and they could not be objective. LEADING INFLUENCER 3 proposed that what was important was the partnership between the internal change agents, whether they were within HR or not, and the external consultant and was: *'... convinced you need to have external consultants since some changes cannot take place without external support'*.

#### **5.4.6 A Behavioural Science / Organisational Culture Focus in OD Practice**

The assumption of rationality in organisational change settings was highlighted by LEADING INFLUENCER 3, who noted that: 'People are not rational, but most managers still believe and operate on the basis that they are. So managers implement rational solutions to irrational problems'.

LEADING INFLUENCER 3 considered that the most successful OD practitioners were so as a result of their ability to uncover, understand and work with the hidden forces in an organisation that remain hidden if a rational mind-set is applied. He viewed the capability to see and constructively challenge taken for granted organisational assumptions and values as being vital for OD success (LEADING INFLUENCER 3).

The traditional form of OD placed more emphasis on group and individual behaviour, whereas contemporary OD has developed to focus predominantly on organisational culture. SENIOR PRACTITIONER 1 and ACADEMIC 2, who had the earliest personal involvement in OD of all the interviewees, came from psychology backgrounds in keeping with traditional approaches to OD. SENIOR PRACTITIONER 6, and ACADEMICS 4, 5 and 6 had studied Organisational Behaviour in undergraduate or postgraduate programmes, and SENIOR PRACTITIONER 4 considered the '*social psychology of behaviour*' as a defining characteristic which differentiated OD from HR. SENIOR PRACTITIONER 4 noted that the programme leader on the OD CIPD course he completed was a psychologist, and that the course was psychologically oriented, acknowledging the *Behavioural Science* roots of OD.

LEADING INFLUENCER 1 noted that '*The Roffey Park approach goes beyond the application of old style behavioural science, also using NLP, transactional analysis, socio-technical systems, dialogic approaches, organisational politics and consideration of complexity and ambiguity*'. Culture change was a major part of the role of SENIOR PRACTITIONER 6, who reported that she was responsible for investigating organisational culture, and to achieve this she led an OD team to sit alongside the HRD team which she also managed.

ACADEMIC 8 stated that organisations '*miss the plot*' by not making organisational culture a priority, and SENIOR PRACTITIONER 1 was of the opinion that not addressing culture would result in a piecemeal approach. SENIOR PRACTITIONERS 5 and 6 had been appointed to head up organisation wide culture change projects, and the project led by SENIOR PRACTITIONER 6 was intended to align the internal organisational culture to the external brand change. In both cases the practitioners were, to an extent, independent of their HR leads, and SENIOR PRACTITIONER 1 contended that when it came to changing culture, that '*HR are not in the game ...*'.

Given the origins of OD, one might have expected more to have been said in the interviews about behaviour and organisational culture, but there was relatively

little coverage of these topics. However, BUSINESS LEADER 1 provided some context in which they play a part:

*'The fundamental that does not change is the quest for effectiveness and to achieve that it is essential to have the people, structures, systems, processes, culture, and behaviours aligned. Once the strategic direction is determined, the specifics follow on from that'.*

#### **5.4.7 Organisational Effectiveness**

*Organisational Effectiveness* was the focus of OD in a recent Francis et al. (2012) text, and was also considered as being important by many of the study interviewees. ACADEMIC 3 referred to the current emphasis in OD as being on efficiency, and effectiveness was considered the most important focus by BUSINESS LEADER 4. SENIOR PRACTITIONER 1 commented that: *'Effectiveness is ultimately all that OD is about. Organisational Effectiveness IS the focus of OD'.*

SENIOR PRACTITIONER 6 was on an ongoing search for the *'holy grail of organisation effectiveness through people'*, and ACADEMIC 1 was searching for sustainable competitiveness. LEADING INFLUENCER 2 viewed effectiveness as sitting alongside culture, values, change and fitness for organisational purpose. BUSINESS LEADER 1 proposed that if business and organisational effectiveness was a focus of OD, it would not become a fad or a fashion.

The concept of effectiveness necessarily includes consideration of approaches, evaluation and measurement. If there was no yardstick to measure against, how did one know if effectiveness had been achieved? In LEADING INFLUENCER 3's organisation the approach to OD consultancy included attempts to integrate evaluation from the outset; and ACADEMIC 6, and SENIOR PRACTITIONERS 2 and 4 referred to the increased emphasis on diagnosis and the use of metrics. The application of these metrics was increasingly perceived in terms of contribution to business performance (BUSINESS LEADER 2) and of OD *'to the bottom line'* (SENIOR PRACTITIONER 3).

#### 5.4.8 Leadership, Taking an Organisation Wide and / or Strategic Approach in OD

In relation to the development of OD over time, ACADEMIC 8 was not surprised about the increase in the importance of leadership capability to OD, or that it developed into *'not just being HR'*: noting that OD had become, linked to organisational structure and operating at CEO / Managing Director (MD) level.

##### 5.4.8.1 Leadership

The importance of OD to leadership and of leadership to OD was highlighted by five interviewees. Leadership capability and emotional intelligence were highlighted as ongoing themes of OD (SENIOR PRACTITIONER 6), and about getting the best out of business leaders (BUSINESS LEADER 2). It was proposed that OD practitioners should: *'facilitate getting the ideas coming out of the business leaders heads, ideas that the business leader may not be aware of, or not have as a focused idea until they are asked'* (BUSINESS LEADER 2).

Leadership was identified as being critical to OD (SENIOR PRACTITIONER 1), as was the challenge of finding a new form of leadership (ACADEMIC 2). It was emphasised that people who changed organisations were leaders, and that OD practitioners could act as supporters and enablers. However, unless they had a strong alliance with line managers, they would not have an impact on the organisation (BUSINESS LEADER 1).

From a theoretical perspective, OD practice was thought to involve working across a whole organisation (ACADEMIC 1). It was proposed that there was an increase in a strategic approach in practice and that there is now *'... a stronger sense of OD is not just HR, but has an organisation wide perspective'* (ACADEMIC 3). Interviewees expressed the need for OD to be organisation wide (SENIOR PRACTITIONERS 1 and 5) and SENIOR PRACTITIONER 1 explained that the downside of using OD techniques to solve a problem in a piecemeal way, rather than in a holistic organisation wide approach was that it will just *'pop up in another form elsewhere'*. LEADING INFLUENCER 1 proposed that OD shouldn't just be theory driven, but

should also be strategically oriented and *'people driven'*. OD is no longer just organisation wide in the normal sense, in addition in contemporary OD a frequent organisational context was in mergers and acquisitions (LEADING INFLUENCER 1).

#### 5.4.8.2 The Rhetoric on Strategy and Relationship of OD to Strategic HRM

In terms of reflecting on the development of *Strategic HRM*, SENIOR PRACTITIONER 6 recollected the rhetoric of *'does HR have a seat at the boardroom and also the move from Personnel Management into HR'* which she placed in the 1990s. One interviewee did not perceive any discernible difference at the most strategic level, between Strategic HRM / HRD / OD, noting that: *'I think the clue is in the term strategic'* (BUSINESS LEADER 1), with another perceiving that OD played only a small part in Strategic HRM (ACADEMIC 3). The prominence of strategy in the HR professional map was noted (LEADING INFLUENCER 2). However, others thought that the idea of *Strategic HRM* had dissipated, and did not consider there to be much evidence of strategic HRM: *'it is not any less important, but it is less in evidence'* (ACADEMIC 8).

Reflecting on whether HR or OD should lead change initiatives, ACADEMIC 8 thought that OD should lead change given its strategic nature. Although seeing HR as playing a part in leading change, it was not viewed as being a driver of change but as a sub-system to support it and in his organisation: *'HR was at the top table', but it was not about setting strategy, they took the role of a professional response and debates on issues such as pensions, in short they took on the staff responsibility function'* (ACADEMIC 8). OD was reported as operating at the more senior levels of HR (SENIOR PRACTITIONER 6) and HR was not viewed as being the only stakeholder in OD: HR was influential, but the strategy function was seen as also being as important to OD (ACADEMIC 8).

Strategic HRM was not seen as being possible without OD by some interviewees (ACADEMIC 1 and SENIOR PRACTITIONER 4). BUSINESS LEADER 1 also outlined the need to have an overarching narrative, for example to help people, make sense of HR policies and why they mattered. SENIOR PRACTITIONER 5

deemed' *contemporary OD to be much more holistic, involving an integrated people plan*' as part of the business plan. The need for a strategic approach was perceived as being important, but not always understood by organisations that often had very vague strategies which consisted of operational objectives (SENIOR PRACTITIONER 1).

SENIOR PRACTITIONER 1 noted that: '*what is important in real strategy is challenging thinking*'. Additionally his view was that a change process that was not congruent with strategic intent would be confusing and not tackle the underlying issues.

SENIOR PRACTITIONER 4 echoed that OD should be strategic, have influence in order to be successful, and that not all organisations had the appetite for that.

BUSINESS LEADER 1 believed that interventions must be: '*... integrated and INTEGRATIVE i.e. they should not just respond to strategy but to play a part in shaping it. This is what an OD person should be doing*'.

#### 5.4.8.3 Thinking and Acting Strategically in OD

According to BUSINESS LEADER 2, the purpose of taking a strategic approach to OD is to enable the provision of efficient structures and organisations. BUSINESS LEADER 1 and SENIOR PRACTITIONERS 3 and 4 were in agreement that it is vital to understand the business, and leverage OD practice in the context of the organisational strategy.

In practice, in her role as a senior academic manager, ACADEMIC 3 reported being more involved in OD in terms of cultural change and the development of people in the context of her rapidly changing organisation. As part of that role, she is responsible for ensuring that people, their activities and their development are clearly aligned with the strategic direction of the organisation (ACADEMIC 3).

BUSINESS LEADER 1 also stated the need for congruence in the approach to people across the board and when in place at a strategic level it should then be followed by having the right policies, procedures and practices in place.

#### 5.4.8.4 Organisation Wide or Wider Still?

LEADING INFLUENCER 3 expressed that it was no longer effective for OD practitioners to operate with a perspective which was limited to organisational boundaries, highlighting that organisations were *'much looser than they once were; they had more porous boundaries, they were more fragile and the future was less certain'*.

The nature of employment had changed employees, and as customers no longer have life-long relationships with discreet organisations as they would have done in the past. As such, organisations have less control than they did in the past, as employees and customers no longer depend on them, and the way in which they are perceived has changed as a result of highly publicised organisational failures: *'the prevailing view of organisations as being unreliable and no longer trustworthy had to be part of the consideration of the context'* (LEADING INFLUENCER 3).

The nature of organisations has changed and this can have an impact on OD. SENIOR PRACTITIONER 2 explained that his organisation's HR function provides services internally, and sells transactional services to similar external organisations. It also has a contract for the provision of organisational redesign services. As such, within the HR department, internal delivery is complemented by commercial business with an external client base. SENIOR PRACTITIONER 2 also advocated an argument for change in internal organisation work group design: *'... future leaders are about reading the environment and supporting self-forming and self-sustaining teams. Creating, disbanding, and morphing teams'* (SENIOR PRACTITIONER 2).

LEADING INFLUENCER 3 recounted that he was not alone in his view of organisations and of contemporary concerns. He noted that at a recent international conference, attended by delegates from the USA, there was much discussion of the shift to looking more broadly not just into: *'...organisations as the unit of study, but outwardly into the broader social system. We need to look more at systemic / domain-wide change, and understand that, not just at organisational change'* (LEADING INFLUENCER 3).

## 5.4.9 Issues of Partnership and Engagement

### 5.4.9.1 Partnership

The partnership approach was rarely mentioned by interviewees and from what was said, there was little in the way of common views. SENIOR PRACTITIONER 1 highlighted that that organisations employing the rhetoric of partnership were often the organisations that were the least likely to actually be *'doing it'*. LEADING INFLUENCER 1 advised that without sound management practice at each level of the organisation and shared leadership the organisation was *'up a gum tree'*.

The importance of applying a partnership approach to leading change was noted by BUSINESS LEADER 4, whilst BUSINESS LEADER 2 considered that what was important in change processes was that *'it should make sense to the people who work in the business'*. LEADING INFLUENCER 1 clearly advocated the partnership approach, and in referring to organisations that rely on knowledge workers, she proposed that *'leadership practice should be about energising and connecting employees with the organisation'*. However, she noted that this approach was rare and despite the growing awareness of the need for it, there was little in the way of understanding and application of appropriate practice. However, she also stated that there was some *'effective work being done in the professional services sector'*, driven by the business imperative to retain professionals with skills and experience, since these were in short supply (LEADING INFLUENCER 1).

### 5.4.9.2 Engagement

Partnership and engagement were often mentioned by interviewees as being interlinked. SENIOR PRACTITIONER 2 was sceptical when referring to OD initiatives on employee engagement:

*'My understanding of OD is that people often used it as a manipulation and designed initiatives to suit themselves. OD needs to be lead from the top but you want emotional engagement, not just compliance. The process needs to be from an honest endeavour, not just to suit the egos of those at the top'.*



He also referred to his organisation's increasing use of employee surveys to measure employee satisfaction or engagement. His organisation was not the only organisation to use this approach, and SENIOR PRACTITIONER 3 also talked about her organisation using *'The Times best company 'b heard' survey'* process. SENIOR PRACTITIONER 6 recounted how in previous employments she had a remit to get *'people engaged'*, and launched an organisation wide AI process in order to get to the *'hearts and minds'* of employees. In the professional services sector, LEADING INFLUENCER 1 highlighted that *'knowledge is power'* and employee engagement was of sufficient importance that senior partners led on employee engagement.

## Context and Challenges

This section will explore findings in relation to the context of and challenges for OD. Data will be presented on the relationship of OD to HR and HRD, the role of professional associations, and national differences, issues of power and politics, critiques of OD and perspectives on the extent to which it is considered as being a fad or fashion. Findings in relation to interviewees' views on the future of OD will also be presented.

### 5.5.1 Relationship to HR and HRD

HR and HRD did not feature in the traditional US form of OD. However, the data collected in the content analysis exercise highlighted clear relationships between HR and OD, and HRD and OD, in the UK. As a result, interview questions were asked about the potential for connection between OD, HR and HRD. Many respondents made mention of OD's relationship to HR and HRD, both from a point of view of certainty and opinion about the existence of a relationship, or in relation to the existence of fuzzy boundaries between them.

ACADEMIC 3 viewed OD, HR and HRD as being necessarily interconnected, stressing that the development of people was central to all three. LEADING INFLUENCER 1 referred to OD having an important role in leadership development, but believed

that HRD, HRM and OD also had an important role to play. LEADING INFLUENCER 3 advocated that all three *'... come under an umbrella which is about the quality and efficiency of work performance in the organisation'*.

ACADEMIC 1 proposed a convergence of HRM, HRD and OD, as it was essential that the areas work together. SENIOR PRACTITIONER 4 explained that in applying OD you had to look at the full range of HR topics together.

ACADEMIC 8 considered HR, HRD and OD as being separate, believing that HRM and HRD had converged to some extent, but that OD was still distinct. ACADEMIC 1 contended that a false division had been created between the three areas, noting that OD practitioners seek to distinguish themselves: *'A lot of OD people make it clear they are not HRM or HRD – it's as though they are saying I am an OD person – and I am better than you'*.

ACADEMIC 6 proposed that as academic subject disciplines, HRM, HRD and OD tended to remain separate. As a mainstream HRM scholar, he believed that his knowledge base might be limited, but saw OD as being more closely aligned to HRD than to HRM. He estimated that the split between the three fields was replicated in practice (ACADEMIC 6). However, talking about the process of developing the CIPD professional map, LEADING INFLUENCER 2 noted that the extent to which the functional models of HR, HRD and OD converged or diverged was about equal.

HRM, HRD and OD draw on different theory and literature, and publish through different channels (ACADEMIC 6). Based on his experience, ACADEMIC 6 did not think that journal editorial teams or reviewers were rejecting articles from other domains, but that articles covering particular areas were only submitted to particular journals by authors (ACADEMIC 6). He noted that this stratification had not arisen from the nature of research as qualitative or quantitative in nature, as methods from *'both camps'* were used successfully in HRM. In talking about factors which could act as driving forces for academics assessing the value of journal selection, he noted that:

*‘For HRD where they are more likely to get higher ranking journals is if they are organisation psychology oriented, more theoretical and quantitative in nature. I guess if you look at HRD and HRM academic work, the HRD work tends to be less grounded in theory. In HRM, in terms of theory lenses, Institutional Theory tends to be a fairly pervasive base’ (ACADEMIC 6).*

#### 5.5.1.1 Blurred Boundaries between HR and OD

Respondents from mainstream HR backgrounds (ACADEMIC 1 and SENIOR PRACTITIONER 3) considered HR and OD to be one and the same thing. ACADEMIC 3 believed that the relationship between OD and HR had changed over time with OD now being a subset of HR, but that this was not the case in the original form of OD. She also portrayed HR as often involved in areas which were traditionally OD activities and by embracing OD, HR had sought to increase its own status. HR had strived to make their role bigger and broader. She considered that OD was no longer a separate and distinct field of study and there were no longer OD practitioners, they had been replaced by HR practitioners who had OD within their role (ACADEMIC 3).

SENIOR PRACTITIONER 6 proposed that the HR profession had also changed and developed, and that HR practitioners were expected to operate in the OD space, with OD operating at more senior levels. Part of the shift of devolving people functions to line managers meant that HR was less transactional, so to own the strategic element of OD was important to the power and status of the HR function (SENIOR PRACTITIONER 6).

According to ACADEMIC 3 the HR community had achieved advantage over the OD community: *‘Over the 40 years, there has been blurring of boundaries of the disciplines of OD and HRM, with HRM coming out on top’*. However ACADEMIC 8 disagreed, being of the opinion that OD and HR continue to be distinct. He considered that HRM and HRD had converged a little, but OD was still separate.

#### 5.5.1.2 OD Should Be a Subset of HR

LEADING INFLUENCER 2, BUSINESS LEADER 2 and ACADEMIC 7 suggested that *OD was a subset of HR*, but even with two of these interviewees, their view as to where

it should sit was not set in stone. LEADING INFLUENCER 2 expressed the view that *'OD done well is an essential part of HR, it is at the crux of HR but that HR could be a subset of OD, or OD could be a subset of HR'*. BUSINESS LEADER 2 proposed that if HR was working well, OD should be within the HR function; if not, then it HR should be driven by OD.

LEADING INFLUENCER 2 noted OD was within HR in the CIPD professional map, but that she found it difficult to separate them or put them in hierarchical order, highlighting that *'at the heart of HR is good business and understanding people. You could argue that that is what OD is about'*.

LEADING INFLUENCER 2 was of the opinion that where OD sat within an organisation was of less importance than the extent to which it was recognised as being an important people process and strategy. As a former HR Director, BUSINESS LEADER 2 believed that OD should be situated in HR. However, she also noted that if HR function was performed *'in a perfunctory manner'* she would rather that HR was situated within an OD function. BUSINESS LEADER 1 said that his experience of HR Directors over the years was that he had worked with many who had really struggled to get out of the technical / functional mind set. Also a former HR Director, BUSINESS LEADER 1 noted that in his first board level position in the 1980s, he considered OD and HR as dealing with the same set of organisational issues and that:

*'... if pushed to decide, because of the way I see strategic HRM, in that it is about facilitating the people part of the organisational jigsaw in its contribution to maximising effectiveness, I would say HR and OD is a subset of that. BUT, it is all about labels'* (BUSINESS LEADER 1).

Competence was referred to by LEADING INFLUENCER 2, BUSINESS LEADER 2 and BUSINESS LEADER 1, who stated that the position of OD and HR depended on who the post holders were, and that this was true for any and all major organisation disciplines. Differentiating between strategic and operational level HR and OD he noted that:

*'... However what is important is how these fit within the strategic intent. In terms of the operational transactional areas and the application of policies these are separate and you need people who are competent technicians in their area whether that be OD or Resourcing; but further up the food chain, you don't need to have a depth of technical competence in all the areas of HR / OD'.*

His opinion was that whilst knowledge of technical skills would assist at strategic level, this was not essential, and that the individual's approach, values and mind-set were more important for strategic people leadership (BUSINESS LEADER 1). This sentiment was echoed by LEADING INFLUENCER 2. SENIOR PRACTITIONER 6 proposed that *'REAL HR'* was not done through the provision and operation of HR policies and procedures, but through OD, noting that OD had been *'missing in action'* for the last decade but was re-emerging in a converged model with HR (SENIOR PRACTITIONER 6).

Only three interviewees advocated that OD should sit within the HR function and their views were subject to a caveat. The main issues for these three interviewees (LEADING INFLUENCER 2, BUSINESS LEADERS 1 and 2) were practitioner capability and the approach of the HR function as the contingent factors in deciding where OD should sit.

#### 5.5.1.3 OD Should Not Be a Subset of HR

Five interviewees believed that *OD should not be a subset of HR*. ACADEMIC 4 that this was a question that *'used to vex him'*, but that he now considered HR to be a subset of OD, and ACADEMIC 2 observed that although OD often sat within HR, it should be the other way round, but that it depends on whether the HR function supports an OD approach. LEADING INFLUENCER 1 stated that OD tools and techniques could be useful for HR, and had a similar view to BUSINESS LEADER 2, who was concerned that they were often applied unthinkingly by HR. SENIOR PRACTITIONER 1 advocated a *'joined up'* approach, stating that HR people would like OD to be a subset of the HR function: but that ideally, the OD function should report directly to the CEO / top management team. LEADING INFLUENCER 1 was of the opinion that HR should be a subset of OD, whilst SENIOR PRACTITIONER 1 had a

strong view on OD's relationship to HR: *'OD is not simply the province of HR, and if it is, god help us! HR is a politically manipulative function ... HR are not in the game of challenging the culture'*.

ACADEMIC 8 was of the opinion that HR should be a subset of OD as: *'OD is strategy and change. HR plays a part in leading change, but it is not a driver it is a sub system'*.

LEADING INFLUENCER 3 considered OD and HR to be different and separate functions. In his view, OD and HR functions were often put together only to ensure administrative convenience, and that the underlying philosophies of HR and OD meant they often couldn't work together. However, he did propose that it would be better if HR and OD worked in a collaborative way. HR has become a transactional activity and OD should be a transformational force (LEADING INFLUENCER 3).

#### 5.5.1.4 OD and HR Should Have a Partnership Relationship

Rather than focusing on the hierarchical relationship between HR and OD, some interviewees considered a partnership approach to be more useful. SENIOR PRACTITIONER 6 believed that an individual's view depended on when they came into HR: she had previously believed that OD was a subset of HR, but was now unsure as to which one took precedence, but did consider OD and HRM to be inter-related. ACADEMIC 1 was of the view that HR and OD were synonymous but that, in her experience, OD practitioners tried to separate themselves from HR which she was critical of as: *'they are missing a trick – there is a disconnect – they don't have the resources to do what they should'*. She added that there was a need to have *'joined up thinking'* (ACADEMIC 1).

SENIOR PRACTITIONER 4 was of the opinion that to judge the relationship to be hierarchical was to make an assumption, and viewed the relationship between OD and HR in terms of a Venn diagram in which HR and OD were equal partners with an area of overlap. SENIOR PRACTITIONER 6 believed that OD had originally been a subset of HR, talked of the two disciplines as being inter-related and did not know

which one should take precedence. However, she did note that her previous boss considered OD to be part of HR, adding that HR professionals were being encouraged to develop more OD skills.

IN SENIOR PRACTITIONER 5's organisation, OD sat separately from the main HR function, but was part of the international HR department. Although the HR director didn't fully understand what OD did, she recognised the value added by the OD team, and talking about their relationship with HR, she noted that:

*'... We don't do any of the 'HR bit', the downstream HR work. That is for the directors/heads of department to implement with their HR people. We do not have anything to offer in terms of the operational HR side. Even in standard structural change we do less on that ...'* (SENIOR PRACTITIONER 5).

SENIOR PRACTITIONER 2 defined himself as being an OD practitioner who reported to the HR Director, with a remit that included leadership of OD but also Training, Staff Engagement, Recruitment, Health and Safety and Occupational Health. As such, his role encompassed a diverse mix of functions usually considered as being part of mainstream HR. This may or may not be a reflection of BUSINESS LEADER 1's comment above: that the structural organisation of OD and HR has as much to do with which people were considered most suitable, as it has to do with the simple matter of objective organisation design.

SENIOR PRACTITIONER 5 viewed OD as operating on more strategic concerns such as organisational culture and power, with HR operationalising what had been designed by OD. He described HR as servicing processes and procedures and *'managing the organisational plumbing,'* while OD had a longer term orientation, positioning the organisation correctly at the right time, *'moving the organisation forward for mutual survival'.*

#### 5.5.1.5 HRD and its Relationship with OD

The content analysis data highlighted the prominent position of HRD in OD in the UK since the 1990s. In the interviews, with regards to convergence of HRD and HRM, SENIOR PRACTITIONER 4 commented on *'HRD being pulled more into HR'.*

Both SENIOR PRACTITIONER 4 and ACADEMIC 1 recollected the merger of the ITD with the IPM in creation of the IPD (later to become the CIPD) in the UK in the 1990s.

BUSINESS LEADER 4 demonstrated how the boundaries between HRD and OD could be blurred; noting that in the public sector, OD was originally considered to be training. SENIOR PRACTITIONER 5 noted that when applying for an HRD role: *'Management development was an aspect to the job and I thought that was what OD was'*.

SENIOR PRACTITIONER 4 believed that OD was synonymous with Change Management but also the same as HRD. ACADEMIC 2 considered that when change led to changes in work organisation and / or different skills requirements, this was where HRD then had its place i.e. in dealing with those. SENIOR PRACTITIONER 6 related that previously known *'related subjects such as Organisational Behaviour, group dynamics and Learning and Development - which I now think of as OD'* were familiar to her. So clearly she saw HRD as being synonymous with OD.

However, some interviewees were of the opinion that OD and HRD were separate. SENIOR PRACTITIONER 5 was of the opinion that OD differed from HRD, as OD practice included *'freedom to diagnose'* and use this as a basis from which to design and deliver effective interventions.

Whilst SENIOR PRACTITIONER 3 said that she had previously thought of OD as being part of HRD she no longer did. ACADEMIC 1 contended that many who call themselves OD were actually HRD practitioners, but there were other OD practitioners who sought to divorce themselves from HRD.

OD was also seen as being an extension of HRD, in that it was simply a case of change of name (SENIOR PRACTITIONER 1). ACADEMIC 1 commented that many so-called OD practitioners were simply engaged in HRD activity. This point was picked up by SENIOR PRACTITIONER 4 who recalled that:



*‘... Especially amongst the learning and development community, I think OD was considered more sexy, a better option than learning and development, which was sometimes perceived as just running training courses. At (company name) I managed the Head of OD, I asked him to explain what it was, it sounded to me a lot learning and development with bells on’.*

The extent to which some in the HRD community acted in the manner of a cuckoo chicks in the OD nest (in that they took on the OD name without changing their HRD core function) was exemplified by SENIOR PRACTITIONER 5 when she explained that she applied for an MSC in *Management Development*, but by the time she started the course title had been changed to *People and Organisational Development*. Since it was reported as a change in programme title only, it would appear that it was thought that a title including OD would be more attractive to potential students, than one situated in the HRD subject area.

#### 5.5.1.6 OD as More Strategic than HRD

One possible reason for practitioners wishing to be seen as OD experts and separate from HR and HRD, is that OD is considered as being more strategic. ACADEMIC 1 explained that there is an assumed *‘hierarchy of esteem for job roles’* in operation. For example: *‘Management Development is more highly esteemed than training, but when it boils down to it – which is more important ... ‘training’ of the bulk of the employees or of the much fewer senior managers’?*

This indicates that a job role which is perceived as having more influence at a senior leadership level is considered as having more impact and therefore is attributed higher status. This being the case OD would, as a more strategic function, also be perceived as having a higher professional status.

SENIOR PRACTITIONER 2 believed that the role of OD practitioner’s was to map: *‘... out where we want to be: training is about providing the practical skills needed to develop that’*. BUSINESS LEADER 2 was of the opinion that OD was a higher form of HRD, sitting at a more strategic level, and therefore being *‘above’* HRD. BUSINESS LEADER 2 noted that: *‘I think OD is about strategising to provide efficient organisations and structures, than it is for learning and development at practitioner*

*level to implement the strategy'*. However, BUSINESS LEADER 1 was of the opinion that there was no difference between HRM, HRD and OD at strategic level, but at the *'deployment level'*, each of these areas of practice was different.

### 5.5.2 Professional Associations

Interviewees made little mention of professional associations. SENIOR PRACTITIONER 1 had been aware of a *'grouping'* of OD practitioners when he worked in the insurance sector in London, explaining that: *'... my boss was in the OD network part of the Association of Management Education Developers (AMED). They had an OD network, but I don't think there was a professional grouping as such'*.

Some interviewees did not think that OD was a professional grouping, and ACADEMIC 3 proposed that it was not even an independent function since it had been incorporated into HR. ACADEMIC 8 judged that as a consultancy, OD is a function and therefore not a profession.

The role of the professional associations in OD, such as the CIPD, was raised by some of the interviewees. LEADING INFLUENCER 2 thought that there was more scope for the CIPD to include subjects such as OD within its remit, since it was already a complex and wide ranging professional grouping: *'When we look at other professions through their professional bodies, their world is much more simple – HR is much more complex as a profession in terms of depth and breadth'*. Conversely, SENIOR PRACTITIONER 1 was of the opinion that with regards to the CIPD putting OD onto their professional map, it was a *'bolt on'*. LEADING INFLUENCER 2 explained that the map had been criticised for focusing on large organisations. As such, the dissemination of management ideas from a professional body may have included unintentional assumptions about the relationship between HR and OD, since this map is used to inform all CIPD accredited programmes throughout the UK and beyond.

ACADEMIC 6 compared national groupings of HR professional bodies, referring to the SHRM in the US and the CIPD in the UK:

*'... There may be a bit of a power play between the CIPD and SHRM, but in terms of the ISO standards, SHRM started that initiative off. In the UK and Ireland CIPD has a monopoly. In terms of post graduate HRM programmes, they just won't have a market unless they are CIPD accredited courses. CIPD have a very strong hold over what is taught'.*

SENIOR PRACTITIONER 4 was of the opinion that the status of the UK HR profession was at risk and that there is a tendency to assume that that anyone can *'now do HR'*. He explained that in the era of Industrial Relations and Trade Unions in the 1960s and 1970s, HR work was considered to be more complex, not everyone could do it, with an emphasis on the psychology and sociology of work.

ACADEMIC 8 had been involved with the SRHM in the USA, and had an interest in the differences between the professions and professional bodies in the USA and UK. As with the view presented by ACADEMIC 6 above, LEADING INFLUENCER 1 also commented on the CIPD positioning itself as a monopoly. She considered the CIPD to have been particularly acquisitive in taking OD into its fold. LEADING INFLUENCER 1 considered that the USA based SHRM had had a *'more partnership of professionals working across boundaries approach'*.

### **5.5.3 National Differences**

Many interviewees had no knowledge of international differences in OD. For example, when asked to compare OD in the UK and USA context, LEADING INFLUENCER 3 stated he was not sure of any difference. Those interviewees who did have knowledge were of the opinion that national differences did exist, but that these differences had changed over time and context.

The primary comparison drawn on OD practice was between the UK and USA. Although ACADEMIC 4 referred to similarities and connections in early OD, he added that the *'story of OD had been mainly told by the US. The danger was the USA scholars were hegemonous in their approach'* (ACADEMIC 4). Given the notion

of USA dominance of early OD and OD's core values including democracy, there was a paradox in the judgement of ACADEMIC 2. The USA had a more centralist approach to management, with other countries applying a more democratic approach to change processes.

Referring to the origins of OD, ACADEMIC 4 placed Lewin, who was of European origin, in the USA in relation to the period during which he was considered to be the founding father of OD. He also stated that whilst: *'... The Americans were innovative and avant-garde ... there has also been a connected / interwoven tradition of OD in the UK'* (ACADEMIC 4).

ACADEMIC 8 cited samples of the early USA based OD scholars, who visited The Tavistock Institute in London, and noted, with regret, that The Tavistock did not have the same influence it once had. He referred to another senior UK academic who advocated a return to its principles in the academic and business world. ACADEMIC 2 noted that the work of the US National Training Laboratory and the Tavistock Institute were influential in the UK from the late 1960s.

Early OD practice in the UK was considered as having been dominated by the USA. From his work in the late 1960s in the oil and petro-chemical sector, ACADEMIC 2 considered that the application of OD was as a result of these companies being US owned. Talking about her career in two large US owned corporations in the early 1980s till the late 2000s, BUSINESS LEADER 2 noted that:

*'My first encounter with OD was in US corporations I think they were amongst the first to adopt OD as a critical practice. OD in ...' (company name and company name) '... was typically driven from the US. The OD experts were based in the States'*

Interviewees also cited sources of influence on US domination of management thinking. ACADEMIC 4 explained that *'... we are influenced in our discourse on OD by the USA'*. ACADEMICS 2 and 6 referred to a history of Anglo-American dominance in management thought and practice. On occasion the US centric influence could unintentionally be given a place. For example, when asked about the country of

origin of the key note speakers commissioned by the CIPD, LEADING INFLUENCER 3 said that the *'thought leaders'* were mainly from the USA. ACADEMIC 6 and BUSINESS LEADER 1 referred to the dominance and therefore influence of the large USA and UK consultancy companies. BUSINESS LEADER 1 stated that in the middle-east, UK influence on business practice was probably stronger than that of the US.

ACADEMIC 3 was of the opinion that contemporary OD operated very differently in the UK than in the US. This was the confusion which had led to the convergence in the UK: *'OD is neither clearly one thing nor another. It doesn't seem to know what it is in the UK context'* (ACADEMIC 3). Whilst this convergence might be deemed as a threat to the OD community in the UK, the outcome might not be as expected. ACADEMIC 5 noted that, unlike the situation in the USA where it was under threat, in the UK OD had flourished.

ACADEMICS 2 and 6 both also refer to the influence on the Brazil, Russia, India, China (BRIC) group of countries. Whilst there was some evidence of isomorphic pressures at work, the adoption of Anglo-American management practice was very variable (ACADEMIC 6), and it was perhaps too early to tell what its influence might be (ACADEMIC 2). ACADEMIC 6 explained that the extent of USA / UK influence in the dissemination of management practices to the BRIC countries was related to historical links. For instance, Brazil was more influenced by the USA, and India more influenced by the UK. There was however, a much less tenuous link between management practices in the USA and UK with their take up in China. Given that China was sealed off from Western influences for decades, this is not surprising. The context of the adoption of management ideas was embedded in the context of the historical traditions of business and management and deeply entrenched in national culture.

ACADEMIC 3 reported that there was difference between the UK and European models of HR and OD. ACADEMIC 2 considered Scandinavian countries would be fertile ground for OD since they tended to have *'a more egalitarian approach in principle'*. Having operated in pan-international roles, BUSINESS LEADER 2 noted

that she had found that OD functions were used less in continental European countries, such as France, Germany, Spain and Italy. SENIOR PRACTITIONER 4 noted that that people management in *'continental Europe, it is often approached from a legal perspective background and tends to be regulation and process rather than human relations / behaviour oriented'*.

#### **5.5.4 Power and Politics**

The matter of OD and power, or the failure to address questions of power and politics, was an issue often raised in the OD literature. ACADEMIC 5, BUSINESS LEADERS 1 and 2, SENIOR PRACTITIONERS 1, 2 and 5, and LEADING INFLUENCER 3 all raised issues relating to power and politics. As such, only a third of the interviewees mentioned *power* and where they did, in the main, it was in the context of personal power and influence rather than issues of power in organisations. This would indicate that power within organisations was of less importance than considered to be by scholars, or that it was such an implicit feature of organisational life that the interviewees did not consider it explicitly or consciously.

SENIOR PRACTITIONER 2 was of the view that HR was not involved in *'shifting power'* but that OD was. SENIOR PRACTITIONER 5 raised the issue of power in OD work on change, with OD's influence over decision making on the future of the organisation. In particular she commented on how people become territorial when faced with the prospect of structural change. For this reason, LEADING INFLUENCER 3 was adamant that external support, in the form of external consultants, was essential. Underlying LEADING INFLUENCER 3's response was the sentiment that external OD consultants are sufficiently free of organisational power structures and therefore more able to challenge organisational norms. Most of the responses relating to power and politics were collected under the interview topic of being capable of challenging organisational orthodoxy.

References to issues of power and influence related to the OD function and practitioners as individuals, rather than to the existence of power in the context of

organisational politics. ACADEMIC 5, BUSINESS LEADER 2 and SENIOR PRACTITIONER 3 were all of the opinion that OD practitioners could source power through influencing senior managers and by making a sound business case for their practice.

SENIOR PRACTITIONER 1 observed that to be successful an OD practitioner required tacit permission from those with power in the organisation, and could not operate successfully from a *'boundary'* position. LEADING INFLUENCER 3 and BUSINESS LEADER 1 noted that it was not possible to work effectively in OD without the sponsorship of a senior organisation leader, such as the CEO. LEADING INFLUENCER 3 added that this senior sponsor need not be intimately involved in the change process, but that there must be regular restatement of support from them as the changes in the system start to *'extrude and people begin to feel less comfortable with the change process'*.

BUSINESS LEADER 1 cited an example of the importance of the acquisition of a powerful position for the OD practitioner, explaining that when offered his most recent role:

*'At first they wanted me to run one of the operations divisions, but she ... (his CEO)... said actually what I would really like you to be is to be the Chief for OD. I said no, because I don't think you can be an effective corporate OD person unless you are one of the 'big beasts' round the table. So I run one of the three divisions AND I am the Head of OD for the overall organisation'.*  
(BUSINESS LEADER 1)

He also emphasised the fundamental importance of the OD or HRM practitioner having the complete backing of the top person and the executive team (BUSINESS LEADER 1).

### **5.5.5 A Range of Critiques of OD**

The lack of evaluation of OD was discussed at some length in the literature. However, only 2 interviewees' made mention of OD evaluation in the course of interviews. The lack of evaluation of OD was mentioned by ACADEMIC 1 who

complained that there was *'... no link between performance and HRD / OD – that seems ridiculous that HRD and OD are not informed by data on performance'*.

According to ACADEMIC 2, the *'thorny subject of evaluation of OD'* needed to be raised, as whilst evaluation of OD interventions was done well at micro level, without macro level evaluation it could be argued that the change would have happened even without the OD intervention.

An issue which was already raised under the section on OD's relationship to HR and HRD raised its head again in the form of criticism of OD professionals in that they project haughtiness over HR and HRD professionals. An attack on OD practitioners from ACADEMIC 1 was that *her 'comprehensive experience was that OD people considered themselves to be superior'*. This was also a finding from the interview with LEADING INFLUENCER 2. Her experience was that some HR practitioners said very clearly that they considered themselves to be OD people, yet: *'you can also hear quite loudly from OD people that they are not in HR and certainly do not want to be in HR'* (LEADING INFLUENCER 2). BUSINESS LEADER 2 recounted criticisms of both OD and HR. She said that OD could be seen to be overly theoretical and HR, which could be seen to be too process and technically oriented, rather than having a focus on the business.

BUSINESS LEADER 2 had a linked but separate criticism of OD, she recounted that some HR directors take a very OD perspective, but where this was the case, *'they couldn't be bothered with the boring HR part of the job'*. LEADING INFLUENCER 2 reported that she was aware of some HR people rebranding themselves as OD, but what they did had not changed. She deduced that:

*'There must be a perceived value of using the OD label – I have noticed a trend in the increasing use of the term OD. There must be a real interest and perceived value in the work of OD. I don't think there is a step change in practice though'*.

There were a number of other varied critiques of OD. SENIOR PRACTITIONER 1 referred to T-groups, explaining that they had a very bad reputation, had often



been applied in the wrong way, and could be very damaging in the wrong hands. He also reported that OD had *'been sanitised, for example, OD as it is now done in the NHS is politically manipulative'* (SENIOR PRACTITIONER 1).

LEADING INFLUENCER 1 saw a primary problem for OD as being that it was often viewed as being a collection of initiatives which were not fully understood by others. She explained that OD could be good at interventions, but that: *'the risk is that they do big change projects applying techniques and not embedding the change'*.

SENIOR PRACTITIONER 1 agreed that where OD interventions often failed was *'on their tail piece'*. SENIOR PRACTITIONER 5 noted that OD could take up a controversial role in organisations, dealing with change where people want to protect their territory. She had found that negative power dynamics could come into play in that situation and people had *'been very badly bruised as a result'*.

## **Fashion or Fad and the Dissemination of Management Ideas**

Many interviewees commented on the extent to which they viewed OD as being a fad or a fashion. Sometimes comments were made specifically using the terms *fad* and /or *fashion*. In other instances, the reference was in terms of characteristics, such as the credibility of OD, which suggested they were reflecting on whether OD was considered it to be a *fad* or *fashion*. BUSINESS LEADER 2 reported that both OD and HR have had to justify their existence on an ongoing basis. ACADEMIC 3 stated that in its original form OD was a fad / fashion.

The adjective *'hippy'* had been applied to OD four times in the interviews, by SENIOR PRACTITIONER 5, ACADEMICs 2 and 4 and by SENIOR PRACTITIONER 1, who commented that in its early days it was *'... on the margins, some thought of it as hippy type stuff and not connected to the business, but some organisations thought it was great'*.

ACADEMIC 3 used the term *'soft and furry'* when she described the original approach to OD. When asked about his first encounter with OD, BUSINESS LEADER 1 reflected that he remembered it *'as a relatively esoteric branch of HRM'*. There appeared to be elements of these opinions which have remained. SENIOR PRACTITIONER 5 recounted *'I think they see us as slightly odd people with coloured pens, post it notes and flipcharts'*. SENIOR PRACTITIONER 2 thought *'slightly weird'* people were good to have in OD, but that most organisations would not cope with well with that prospect. LEADING INFLUENCER 2 remarked that she had previously thought OD was *'faddy'*, but had since heard very good samples of OD work being described. BUSINESS LEADER 1 complemented this view, in stating that there were OD fads, but it was not fundamentally a fad.

In terms of whom was driving the development of ideas and trends ACADEMIC 7 explained that, in many cases, academics follow practice but as academics then take ideas forward, practice did not catch up. SENIOR PRACTITIONER 2 considered that a driver for adoption of OD by individual practitioners was that they see it as a route to career promotion, authority, influence and being respected.

ACADEMIC 2 provided a further example of how the dissemination of management ideas happens in practice. He gave the illustration of how one large company influenced the practice adopted by another large organisation in the same geographical area: *'... because the companies were fishing in the same Labour market it was natural that some of the practices from (company name) would spread to other manufacturers'* (ACADEMIC 2). In other perspectives on the dissemination of ideas, SENIOR PRACTITIONER 2 proposed that the shape of OD was being driven by social networks and online communities such as Twitter, Facebook and LinkedIn, with *'a lot more conversation is taking place through these forums every day'*.

ACADEMIC 6 presented the view that since *'OD had been around for a while so it was de facto not a fad'*, but added that the definition of *'fad'* had to be considered. LEADING INFLUENCER 3 noted that there were fashions and some elements of

management practice become fashionable at points in time. Both ACADEMIC 6 and SENIOR PRACTITIONER 4 described the nature of fashion in applying the label of fashion to a practice but explained that applying the label fashion to an OD practice did not necessarily mean that there was a change in the underlying practice.

ACADEMIC 6 referred to *'talent management'* when discussing the aspect of fashions in labels and SENIOR PRACTITIONER 4 recounted that *'of course there is no longer Personnel now it is always HR. We no longer see Pay and Benefits we see Total Rewards. No longer is it Training and Development, but now it is OD'*.

There were phases where *'managers can't do without'* OD Professional guidance and then other phases when self-sufficiency became the fashion (LEADING INFLUENCER 3). ACADEMIC 8 was clear that he judged OD to be an important aspect of change, an ongoing necessary competence of any organisation. BUSINESS LEADER 2 was equally robust in her view that OD was a critical element in driving a business forward and added that she had *'25 to 30 years of practical samples of that'*.

Two of the interviewees (SENIOR PRACTITIONERS 2 and 4) concluded that OD being considered as a fashion or fad was due to the lack of a clear definition, it was unclear and misunderstood, which left it open to criticism and condemnation as a fad. SENIOR PRACTITIONER 1 argued that it was in the context of HR that OD had become a fad, since HR people didn't understand what OD was or what they were dealing with. BUSINESS LEADER 2 agreed that there remained *'a lot of mystique'* around OD. SENIOR PRACTITIONER 4 advised that the way to prevent misunderstanding was to develop rigour for the practice field, and to develop a body of knowledge with a clearer construct of what OD required *'that we all need to agree on'*.

BUSINESS LEADER 1 criticised the *'...OD toolbox guy, who looks for a problem to solve using his / her toolbox - irrespective of the organisational context'*. His view was that OD was about two core elements. Firstly, and most importantly, business was about business and OD was about ensuring that the business is fit for purpose.

Secondly, the complexity of human behaviour remains unchanged. Furthermore: *'If you keep these two "universal truths" in your sight, then it stops you being conned by the snake oil salesmen'* (BUSINESS LEADER 1). LEADING INFLUENCER 1 agreed that OD must *'not just be a box of tricks'*, but capable of assisting in change contexts and volatile contexts where people, on whose performance an organisation depends, were treated ethically and equitably.

ACADEMIC 5 advocated the need for more transparency on what OD was about and SENIOR PRACTITIONER 4 added that without further clarity it risked being considered as a fad or fashion. His view was that there needed to be a clearer construct of what OD requires and there need to be agreement.

#### **5.6.1 The Application of the *OD Name* as a Fashionable Label**

The issue of naming of OD was perceived as subject to fashion by four interviewees. ACADEMIC 1 was very much of the view that the title 'OD' was a fad and would disappear. LEADING INFLUENCER 1 agreed that there may be an incentive for individuals to adopt the title of OD as: *'... job adverts do promote practice; they are often designed to be sexy / attractive. I guess you could say they are aspirational. Hopefully there is an underlying shift in OD; it's not just a fashion'*.

SENIOR PRACTITIONER 1 was of the opinion that there were instances where OD had been *'stuck on'* as a label to what were essentially HRD job roles. ACADEMIC 6 viewed OD as being *'a trendy term that reared its head from time to time'*. He commented that whether it was *'applied with the intention of being an impressive term that organisations used, it had been around for a while and it was distinct'*. SENIOR PRACTITIONER 3 also referred to the naming issue: *'... I do think there is an element of - oh god, not another change in title. If HR don't even know what OD is, then how the hell is anyone else supposed to know?'*

#### **5.6.2 Trends on Being in or Outside of HR**

With regards to whether OD sits within or outside of HR, ACADEMIC 1 considered that OD will go out of fashion if it continues to be a separate function, distinct from

HR. SENIOR PRACTITIONER 4 stated that OD was still '*... zigzagging in and out a bit, where it goes depends on those in the OD profession*'.

SENIOR PRACTITIONER 4 noted that part of the context is that HR needs to decide whether it will step up to the challenge. If not, it risks becoming side-lined as a simple administrative function rather than proving itself capable of being a more powerful influencer at top management level (SENIOR PRACTITIONER 4). His argument indicated that OD is likely to be more powerful and influential in the longer term if it stays separate from HR. However, SENIOR PRACTITIONER 6 took a different view, that '*Perhaps there was a shift from OD to HR which has now come the other way round, from HR to OD? However with the recession it may be that we will go back to the hard form of HR*'.

A singular perspective put forward by BUSINESS LEADER 2 was that in terms of significant changes in its development, OD had shifted its orientation away from HRM towards the business. This was contrary to the view of ACADEMICS 2 and 3: ACADEMIC 2 considered there to be a general trend of convergence between OD and HR driven by the HR community; and ACADEMIC 3 proposed that '*By mimicking OD, HRM has gained strength and strayed into the OD domain. HRM has strived to make their role bigger and broader*' (ACADEMIC 3).

SENIOR PRACTITIONER 1 argued that the move of HRM into OD had led to it being viewed as a fad, since HR people didn't understand what OD was. He said that this was especially so in the public sector where OD was not understood as being a competency. LEADING INFLUENCER 1 also referred to the growing popularity of OD in the UK HR community, noting that '*In HR circles, OD is seen as a discipline that HR ought to own, but I don't think OD is a discipline within HR, if anything HR is a discipline with OD*'. Another contextual trend of relevance was identified by SENIOR PRACTITIONER 4 who noted that with increased pressure on business profitability, there was more concentration on cost efficient methods such as the use of technology and outsourcing of people management processes.

### 5.6.3 Future Projection for OD in the UK (Growth or Decline?)

With regard to the future projection of OD, ACADEMIC 1 estimated that OD would experience exponential growth and then decline. ACADEMIC 5 differentiated between what would happen in the UK and in the USA, noting that *'there is a decline in OD in the USA and an ascendancy in the UK'*. LEADING INFLUENCER 1 partly linked the resurgence to OD in the UK to the interest shown by the CIPD.

BUSINESS LEADER 2 considered market conditions, and the size and success of individual organisations, would be the predominant influence on the future of OD. She noted that when economic conditions became tighter, organisations with separate OD functions cut back the OD function. Interestingly, LEADING INFLUENCER 3 said that although economic retrenchment usually involved cuts in investment in development, OD consultancy was often busier when the economic environment was difficult. He maintained that this was due to some organisations using the time to prepare and develop in order to gain advantage for when recession ends.

### 5.6.4 Is a Change of Focus of OD Anticipated?

With respect to the future development of OD, evidence of effectiveness and tangible outcomes of OD efforts was a key theme. ACADEMIC 3 reflected that business focus was now on the bottom line, but that this did not sit easily with the original concept of OD. ACADEMIC 1 envisaged that in the future, the requirement in OD will be for *'all-rounders'*. ACADEMIC 1 and BUSINESS LEADER 1 considered that a focus on organisational effectiveness would lead the OD agenda. BUSINESS LEADER 2 described this as a move to OD being required to show competence in *'value add'* activity, and this would be particularly needed if OD was to succeed in the private sector.

ACADEMIC 6 predicted that OD would be affected by the general trend of increasing use of evidence based management approaches. He highlighted the increase in the effective design and use of data analytics to provide information on how people based decisions were made. SENIOR PRACTITIONER 2 referred to

instances of metrics being used in his HR Department, explaining that they made use of an HR dashboard: with data provided by *'an analytics team – so we have an economist a mathematician and a psychologist in the team. We use data mining techniques'*. Diagnostic metrics were used to inform a number of activities, such as the decommissioning of services and the design of the structure of new services.

SENIOR PRACTITIONER 1 also reported greater emphasis being placed on performance and the use of metrics, and SENIOR PRACTITIONER 1 advocated learning from the use of diagnostic root cause skills from the discipline of lean engineering. He proposed that a combination of the application of diagnostic skills based on lean principles, with people and Change Management skills, would work best.

#### **5.6.5 Overarching Development of OD**

ACADEMIC 4 described two main views of contemporary OD in the UK. One perspective is: *'... That it was of its time and has had its day. I guess this is the view you get from Karen Legge, and that it was killed in the economic and political climate of the 1980s and 90s...'*

That is to say, that the OD was considered as *soft* in its approach to change and this simply did not fit well with the ethos of that business era in the UK. He added though that ACADEMIC 4 described two main views of contemporary OD in the UK. One perspective is:

*But, the other view is that OD is still very much alive – it is being researched, written about and being taught. These may not always be called OD but there is still activity: Action Research, Group Dynamics, Reflective Change, a focus on Culture, Consultancy Process and Change Management Processes'.*

LEADING INFLUENCER 2 remarked that change and development of OD was not a matter of changing fads, but of evolution: *'I think the trends wax and wane – but the underlying concepts never go away. Certain things have more prominence at certain times'*. She also referred to OD as being considered as undergoing ongoing development, even amongst the *'US gurus such as Edgar Schein'*. She proposed that

OD had moved on from planned change being the focus, to process interventions.

LEADING INFLUENCER 3 thought that the clue to change in 'Organisation Development' was in its very name, noting that:

*'The big changes in the last 20 years come from what has happened with organisations – the change in their purpose, functioning and how the individual and public perceive them. The large hierarchically structured, stable organisations no longer exist in the way they once did'.*

Moreover, the extent to which organisations had 'porous boundaries' and their tasks were changing (LEADING INFLUENCER 3) required consideration. Taking the current context of organisations into account, LEADING INFLUENCER 1 concluded that OD was far more than a fashion and that the applied field of thinking and practice was even more important now than in the past.

## Conclusion

The interviews proved invaluable in giving life to the rather inert data supplied by the analysis of job advertisements and the bibliometric search. Although their very richness makes it challenging to tease out common themes, the data presented is all important and inter-related. For example the sections on history (6.3) and contexts and challenges (6.5) contribute to understanding *how* contemporary OD as outlined in 6.4 has developed. Furthermore section 6.6 adds to our understanding of the *why* OD has developed in the way it has - for example - the presence of mimetic forces at work.

The next chapter draws together the three strands of evidence, but it is helpful to summarise some key findings from the interviews. It is certainly clear that this material supports the need for a multi-attribute definition of OD. Interviewees represented a range of views, but what was clear was that the *traditional* form of OD, as *Behavioural Science* and / or the application of recognised OD processes was a minor note in contemporary practice. Although most interviewees could not



provide much evidence on the early years of OD practice, they were able to reflect on developments from the 1980s onwards, in which issues of the relation between OD and aspects of HR practice, such as HRD, started to appear. The material confirms the degree to which opinions diverged based on experience and community membership, which points to the gap between academia and practice discussed below.

The interviewees shed a considerable degree of light on the core attributes of OD. As well as downplaying the *Behavioural Science* aspects, it was noticeable that there was also relatively little mention of concepts such as the *learning organisation*. Instead, interviewees drew attention to the *big picture* aspects of OD – the need for systemic thought and attention to organisational culture. In this, and in other areas of discussion such as the contemporary nature of change, the question of organisational boundaries was raised. OD was seen by some to draw attention to the need to place the organisation in its broader context, considering change across organisational boundaries. This challenging expansion of the scope of OD also drew attention to the need for team working within the profession (and with its boundary professions), as individuals could not be expected to encompass the broad range of skills and experience needed. The interview material was invaluable in pointing to the varied routes in to OD, all of which emphasised the need for broader thinking.

This also raised questions about the need for and capability of OD to challenge organisational orthodoxies. This raised an unresolved question about the position of consultants. For some, such a position gave the necessary independence of thought to challenge those in positions of power. Certainly, interviewees confirmed the growing importance of change management in conceptualisations of OD (something to be returned to when set against the job advertisements in the next chapter). Interviewees contrasted the transformative potential of OD initiatives to what they saw as the transactional nature of much HR. As discussed in some detail above, the relationship between OD and HR is a complex one, on which there were divergent opinions. It was important to rehearse these divergent opinions in some

detail, as they provide understanding of common influencing forces in the development of the professions and as such form part of the concluding discussion. However, what was clear from the interviews was the growing emphasis amongst practitioners and academics on the need for evaluation of the effectiveness of OD. This could be related to the widespread discourse of strategic thinking in organisations, with an accompanying emphasis on ways of measuring performance.

It was here that there was a divergence between academics and practitioners. Perhaps unsurprisingly, it was the academics in the sample who were more likely to raise concerns found in the literature review to do with the role of professional associations and national contexts and questions of power and ethics. This points to the divergence between the two communities, one which it will be argued in the following chapter has to be related to differing standards of performance in each community. The boundaries explored between, for example, OD, HR and HRM, are as much an artefact of artificial academic boundaries, reinforced by publishing practices, as they are accurate representations of practice. These questions are taken up in the following chapters, first through a comparison of the evidence obtained through the three different methods.

## **Chapter 7. Discussion**

The theoretical proposition for this work was set out in Chapter 2, the existing literature was reviewed in chapter 3, and the findings were presented in Chapters 5 and 6. PART 1 of this chapter will compare these findings with the themes identified in the existing literature. PART 2 will compare the findings with the theoretical position. PART 3 will then present a discussion on the debate of the future of the OD profession.

### **PART 1. Similarities and Differences between the Literature on OD and the Data Collected in this Study**

#### **Origins of the Name of OD, Early OD, Definition, Blurred Boundaries and Confusion**

Interview data did not highlight dispute about the validity of the label 'Organisation Development'. However, interview findings did support the literature in relation to OD being difficult to define, with blurred boundaries. Whilst early and US-based literature (e.g. Beckhard 1969) appeared to provide definitions with more certainty, more recent literature has presented multiple definitions (e.g. Cheung-Judge and Holbeche, 2011; Cummings and Worley, 2015; Senior and Swailes, 2010) and highlighted difficulties in providing a clear definition of contemporary OD (Garrow, 2009; Greiner and Cummings, 2004). The content analysis data suggests that the nature of UK OD changed between the 1970s and 2010, again highlighting definitional difficulties. This suggests that any definition has to be multi-dimensional.

Boundaries with other linked disciplines also cause definitional uncertainty. The literature identifies these linked disciplines as being organisation design, operational science and HRD (in particular Management Development). The variation found in the content of job roles over time adds to this confusion with, for

example, the HR and HRD functions. Interview data highlighted HR and HRD as having blurred boundaries with OD, with Change Management also being identified as proving difficult in terms of boundary clarity with OD.

## Core attributes of OD

### 6.2.1 Traditional OD and its Development over the Decades

A noteworthy discrepancy was found between the literature and the research findings in relation to the development of OD over time. One academic interviewee, and the bibliometric data, highlighted that the US view of OD had dictated thinking on the nature of OD. Moreover, in describing OD, interviewees made little mention of the potential for national differences in OD form and practice.

US-based scholars (e.g. French and Bell, 1999; Cumming and Worley, 2015) provided accounts of OD that clustered around descriptions underpinned by traditional OD with a systems and process orientation and a *Behavioural Science* focus, in particular around team functioning. However, US based scholars Ruona and Gibson (2004) advocated that OD should converge with HR and HRD, even though most US-based scholars' explanations of the development of OD were based on the traditional form of OD and its evolution. Only in UK texts by Cheung-Judge and Holbeche (2011 and 2015) and Francis et al. (2012) was there any significant reference to the relationship between OD, HR and HRD.

More recent perspectives include AI, discourse and dialogic approaches to OD from the work of Bartunek and Woodman (2015); Bushe and Marshak (2009); Grant and Marshak (2011); Marshak and Grant (2008); and Oswick et al. (2010). Although this range of authors are internationally based with three from the USA, one from Canada, two from Australia and one from the UK, much of their debate was conducted through publications in the US-based OD *Journal of Applied Behavioral Science*. Other significant developments in OD, such as a large group focus for practice, were reported by US based Schmidt Weber and Manning (1998). Another

area of discussion, first generated by Marshak and Grant (2008: 57), focused on the eras of '*Classical OD*' and '*New OD*'. In the main, the differentiation of these eras of OD is recounted by others without critique, with the exception of Burnes and Cooke (2012).

Although some of these developing OD perspectives were discussed by interviewees, in general, the nature of interviewees' experiences did not match with the discourse of the literature in this area. Dialogical, discourse or large group approaches to OD practice were not mentioned, and only one interviewee made reference to '*Classical OD*' or '*New OD*'. The most significant difference between the literature and the content analysis and interview data was in reference to HR and HRD, where the concentration of views in the literature on OD being around traditional OD was far outweighed by rhetoric of OD and its relationship to HR and HRD. Interview data highlighted the presence of an assumed ongoing link to HR and HRD which was absent from the primarily US generated literature on OD.

Interview data and content analysis findings contradicted the existing literature on the nature and form of OD. As outlined in the content analysis findings in Chapter 5, the 1970s profile of OD in the UK was found to have a resemblance to traditional OD, but changed over time. The content analysis highlighted the prominent HR presence in UK OD in the 1980s, with HRD becoming important in the 1990's. Between 2000 and 2010 UK OD evolved to include a broader range of key characteristics; including HRD, HR and the development of a *Strategic and Organisation Wide Orientation*.

### **6.2.2 OD Training, Qualifications and Skills**

It is apparent from the literature review that the organisation of training and qualifications differs between the USA and the UK. US scholars were credited with the development of the first degree and PhD programmes, and establishing an OD Network in the 1970s. Along with the Colwill (2012) scholar practitioner text, it would appear that there was a long held tradition of formal training and qualification being considered integral to OD in the USA. In the UK, OD was only

subsumed within the CIPD professional map in 2007 and there was little else in the literature to suggest that UK training and qualifications infrastructure was as embedded as that in the USA, or that it had a similar history of development. Interview data supported this, with only Sheffield Polytechnic (now Sheffield Hallam University), Edinburgh University, Roffey Park, the CIPD and NTL cited as delivering training and qualifications. However, neither Edinburgh nor Sheffield Hallam Universities now offer OD programmes.

In relation to skills requirements for OD practitioners, there was broad agreement between the literature and interview findings. Interview responses aligned, to a large extent, with Neilson's (1984) framework which proposes that effective OD practitioners should have conceptual, technical, interpersonal and integrative skills. The need to possess an understanding of businesses, Change Management and developing experience were also features of both the literature and the interviews. However, interview responses were more detailed in this area, highlighting that skills requirements should be related to the context, so different competences were required in different business. For example, interview responses highlighted that OD competences required for involvement in developing organisation strategy were not the same as those required to implement interventions, where knowledge and experience of technical OD tools was more important. As such, any attempt to have a general model of the skills required by an OD practitioner may not be feasible or appropriate, since the competencies required depend on context. Of note in the interviews, but not mentioned in the literature, was the extent to which generalised or more specialised people management skills are required by OD practitioners, with interviewees proposing that this was linked to the size of an organisation.

The extent to which knowledge of self was required by OD practitioners was a feature of the literature and the interviews. Several of the interviewees made mention of the need for self-efficacy in relation to the ability to challenge organisational orthodoxy. Whilst this was a prominent feature in the interview data, it received less coverage in the literature.

### 6.2.3 Other Core Attributes of OD: Change Management, Consultancy Orientation, Behaviour and Culture, Effectiveness, Strategic, Leadership, Partnership, Engagement and Learning Organisations

The boundary between the field of OD and the field of *Change Management* receives little attention in existing literature: planned change is presented as being a feature of OD, with other forms of *Change Management* generally treated as being distinct and separate. However, interviewees' understanding of distinct boundaries between *Change Management* and OD was less clear. In particular, a small number of the academics expressed that there was confusion on this topic. The content analysis found that *Change Management* had come to prominence from a base of being a strong foundation feature of 1970s UK OD. The importance of *Change Management* in OD was reflected in the interview data, and almost all of the interviewees discussed the management of change in the context of OD.

A *Consultancy Orientation* was assumed as a characteristic of OD in the literature, in particular in the US, but was seldom mentioned in this study by the interviewees. In the content analysis profiles in each of the four decades, having a *Consultancy Orientation* in the role of OD practitioner held a consistent position. However, there was a mixed response from interviewees with the two OD consultant interviewees, perhaps not surprisingly, proposing that external OD consultants were essential to its success.

The importance of *Behavioural Science* in early OD is a feature of the literature amongst US-based scholars until the late 1990s, and in more recent accounts by UK authors (see Cheung-Judge and Holbeche, 2011; Stanford, 2012). It was also an element in OD training at Roffey Park and in the UK NTL programme. However, the content analysis data found this facet of OD to be of importance only in the 1970s. Its importance then declined over the 1980s and 1990s, then becoming more important again between 2000 and 2010: most likely in the guise of organisational *Culture* rather than *Behavioural Science* per se. In the main, interviewees did acknowledge that *Behavioural Science* is trait of OD, with a number referring to

their study of organisational behaviour. However, there was little discussion of organisational *Culture* in the interviews.

The quest for *Effectiveness* had been an early attribute of OD identified in the literature which increased in focus particularly in the UK with, for example, the Francis et al. (2012) text. The growth in importance of *Effectiveness* in the UK form of OD was also expressed by interviewees, both explicitly and implicitly: accounts were provided of the growing importance of performance data use and the measurement of contribution to the *bottom line* across all people management disciplines. The content analysis data accorded with this focus on *Effectiveness*: it had a small but clear presence in UK in the 1970s profile of OD, became slightly more important in the 1980s and 1990s and grew to become the fourth (equal with *Strategy*) aspect of OD between 2000 and 2010.

With few exceptions, the need to take a *Strategic Approach* to OD was evident in the literature, particularly after 2000, and in the interview and content analysis data. However, there was little written, with the exception of Burnes and Cooke (2012), on the need to consider wider than organisational boundaries in terms of the system within which OD is situated. One interviewee (a leading influencer) gave the opinion that there was a requirement to understand that organisational boundaries were not as firm as they once were and the wider business and social system must be considered.

The content analysis data identified that issues such as *Leadership, Not just HR, Partnership* and *Learning Organisation* had a small to moderate presence in UK OD after 2000. Although these topics were barely mentioned in the existing literature, in one exception (Sharkey, 2009) there was a call for OD to become more involved in the selection and development of organisational leaders. There was little mention in the interviews of *Partnership* and *Learning Organisation*, topics which appeared in a small number of the later advertisements. However the trend of seeking information on and improvement in employee engagement, which was not



mentioned in the literature, was reported as being of importance in the organisations of a small number of the interviewees.

## Context and Challenges

### 6.3.1 Relationship to HR and HRD

With the exception of Beer (1976) and Burke (2004), few US based authors make reference to HR and HRD. Even where OD and its relationship to HR / HRD is mentioned by US scholars, it tends to be as a tangential issue (see Sweem, 2009) on the subject of talent management, and in Sharkey (2009) in the context of alignment to the business strategy.

In contrast, UK authors such as Cheung-Judge and Holbeche (2011), Francis et al., (2012), and Stanford (2012) present a far more entrenched link. The content analysis data identifies a relationship between UK OD and HR / HRD starting in the 1980s, so this convergence has had decades to become the norm. A primary difficulty cited in the literature is that OD and HR have different functional modes, with OD being process driven, and HR being content driven. Another area of difference identified in the literature is the extent to which OD and HR are considered as being embedded within the business. HR is considered as being more aligned with hard line business objectives and OD practitioners thought to be governed by their professional value set, and more open to challenge senior leaders. With respect to HRD, a small number of interviewees were of the opinion that OD and HRD were synonymous: a finding which matched the content analysis data from the 1990s onwards.

The findings of the content analysis data for HR and HRD in OD in the UK focused on the variation in its profile in OD over the decades. As such, it is not surprising that interviewees expressed a wide range of varied opinion on the relationship between OD and HR / HRD. Interviewees viewed the boundaries between these three functional areas as being particularly unclear, and expressed a range of views on

the existence of a hierarchy between the disciplines. Some expressed that if there was a hierarchy, that OD had the higher status of the three professions. From other interviewee perspectives, OD practitioners created an impression of superiority, in that they actively distanced themselves from being identified as a form of HR / HRD. Most interviewees considered OD to be more strategic in orientation than HR or HRD, with some highlighting that OD and HR and HRD must work together (see Ruona and Gibson, 2004).

### **6.3.2 National Differences**

Although there was occasional reference to national differences in the *application* of OD in the literature, OD in itself was treated as though it was a homogenous practice. The one exception is Burnes and Cooke (2013), who highlight that UK scholars had influence in the development of early OD. The bibliometric search identified a significant number of published journal articles in UK and German based journals. The existence of this body of work is not reflected in the writing of US-based scholars. It was also clear from the content analysis that the UK form of OD has significantly changed from the traditional form of OD which had been practiced in the UK in the 1970s. The wide range of content in contemporary UK OD, as reflected in the twelve facets which emerged in the content analysis coding exercise, was also reflected in the interviews. As stated previously, it is of particular note that the content analysis and interviews highlighted that OD in the UK is not the form of OD described by dominating USA scholars.

Academic interviewees made comment on national differences in the origin and development of OD. The extent to which embedded national culture and tradition in management practice was linked to the likely adoption, or otherwise, of any developing idea was also discussed. Their views reflected the findings from the content analysis: that in the UK, OD had developed and moved away from the traditional form of OD. Nevertheless, a small number remarked on the ongoing dominance of the USA on management thought and practice. The influence of the USA in early UK OD practice was also noted by practitioner and business leader

interviewees with experience of working in US-based companies. A more recent example of USA influence was given in the impact of the employment of large USA consultancies in international settings.

A particularly noteworthy difference between the literature and the content analysis data was that after 2000, there was debate amongst US-based scholars on the decline of OD, whilst during the same time period OD in the UK was thriving, as reflected by the significant growth in the number of job roles advertised.

### **6.3.3 Ethical Values, Issues of Power and Evaluation of OD**

A notable difference between the literature and the data from this study was in the perceived importance of ethical and humanistic values to the OD profession. Whilst this was given prominent coverage and considered to be a core attribute of OD by scholars, there was mention of the importance of the need for an ethics by only one interviewee. With one exception, the notion of values was primarily used in the context of being able to challenge organisational values, rather than personally holding values as a practitioner. The concept of ethics was absent from the content analysis and was not allocated a code given that it did not arise as a feature in OD job advertisements.

Existing literature criticised OD for not acknowledging or dealing with organisational level differences in power. The concept of power was mentioned in interviews in relation to the sense of increasing power and influence for the OD function and practitioner. The rhetoric was that of the OD practitioner being capable of dealing with organisational politics in order to enhance OD's influence, as opposed to power issues within organisations.

Although more prevalent in the literature, the topic of evaluation was also mentioned by a small number of interviewees, mainly in relation to criticism of OD for failing to clearly evaluate its contribution. A key concern in the literature, and from interviewees, was that OD must demonstrate a tangible contribution to organisation performance. The literature focussed on a range of issues, from the

simple evaluation of practice at organisation level, to the need for academics and practitioners to work in partnership to develop rigorous research suitable for application. The literature also proposed that OD should become involved in the increasingly difficult business issues which impact at societal level. This sentiment was also expressed by two of the interviewees.

## The Role of Professional Associations

Existing literature and interviewees made little mention of the professionalisation of OD. In the instances when professionalisation was mentioned, it was primarily with reference to ethics and regulation within the profession. Also apparent from the literature was that in the USA, OD is a particularly scholarly area of practice and a small number of the interviewees also considered OD practitioners to be more academically inclined than their HR colleagues. This feature was arguably one that added to the perceived higher status of OD practitioners.

Although no membership numbers are available for the US-based OD Network, it was an embedded institution in that it had long founded relational links to other organisations, such as the *Journal of Applied Behavioural Science*: and a Division of The Academy of Management. There was no apparent link between the OD Network and SHRM. Whilst the US OD Network developed codes of practice, they did not regulate their membership. However, based on the extent of coverage on their website, they were particularly keen on promoting OD's values and ethical approach. In the UK, the CIPD had a code of conduct and their approach was more clearly aligned with the findings in the literature: that HR has a different value set and is more embedded in business rather than with employee concerns.

The situation with professional associations was found to be different in the UK to the US. There was no UK based professional association for OD, although there was the comparatively new European OD Network which was linked to the USA Network. In the UK, the CIPD integrated OD in its professional map, whereas in the USA, SHRM appeared to have little presence in OD. The CIPD took a highly

regulated approach to their chartered membership status and levels (CIPD, 2015), but anyone could become an SHRM member (SHRM, 2015a) and SHRM certification was not required to secure employment (SHRM, 2015b). In short, the professionalisation and nature of professional associations in US and UK OD / HR / HRD communities was fundamentally different.

The professional status of OD was mentioned by two of the academic interviewees. Of note was the strong opinion expressed that the CIPD was more predatory in its approach than SHRM. Including OD in the CIPD professional map was considered as one example of the CIPD moving into professional territory that was not theirs to take.

## **PART 2. A Comparison of Insights from the Theoretical Position with the Data Collected in this Research**

In the literature and interviews OD was consistently referred to as being a profession, and could therefore be viewed through the lens of Institutional Theory. A primary concept within institutional theory is the phenomenon of isomorphism (DiMaggio and Powell, 1983). OD as a profession in the UK has so far behaved in a less isomorphic way, in terms of professional association, than might be predicted. Practitioners in OD have been slow to form into professional association; although the foundation of the European OD Network in 2012 shows that the situation might be changing.

### **Professional Association Status for the UK OD Profession and Agency Therein**

Having been late to form a specific association, OD practitioners left a vacuum in terms of professional grouping. Interview data highlighted that the CIPD is thought to have taken advantage of this by absorbing OD into their community. With such a long held presence in the UK, the CIPD has an interest in maintaining its position and managing its boundaries. In accordance with Institutional Theory, they act as gatekeepers with tight control over membership status, although having less of a hold over dictating who can legitimately provide which services (Muzio et al., 2011). Although a normative approach was that normally taken by professions, unlike the OD Network, the CIPD appeared to apply agency in acting as regulatory agents for their professional community (Greenwood et al., 2002).

The CIPD has highly developed relational networks (Scott, 2008a), interacts with other organisations and acts as a lobbying body at national level. It is normal for professional institutions to collaborate with other institutions in networks (Greenwood and Meyer, 2008), engaging in joint discussion and development of

practice. However, no evidence was found of the CIPD seeking relational networks with the OD Network, or vice versa.

Arguably, the timing of CIPD and OD practitioners becoming interested in the development of a professional association for OD may have been linked to the growth of OD job roles, as found in the content analysis. One reason why management fashions develop is in response to economic forces (Abrahamson, 1996a), and as such it could be considered that the CIPD reacted to the exogenous precipitating jolt of growth in market demand for OD skills by placing OD within its professional map (Greenwood and Suddaby, 2002). However, that said, the CIPD did not include OD in its professional map until 2007.

The Greenwood et al. (2002) model of non-isomorphic change (see Chapter 2) includes a de-institutionalisation phase prior to re-institutionalisation. If the CIPD is to be successful in integrating OD professionals within its community, according to Greenwood et al.'s (2002) model, it may have to de-institutionalise first. With respect to the union of the IPD and the ITD in 1994, one would expect there to have been extensive de-institutionalisation in each of the organisations to achieve the merger. There were likely to have been extensive changes such as: agreement to a new name for the organisation, revised organisational structures including in the leadership structure, office location changes, merger / alteration of membership levels criteria, revision of publication. These were both independent professional associations, therefore to have carried out deinstitutionalisation on this scale, one might naturally expect that there was perceived advantage for both parties to the merger.

It is unlikely that the CIPD would be prepared to de-institutionalise in order to integrate OD as an equal partner in their professional grouping, as the OD community has not yet sufficiently institutionalised in itself as a professional association to be in a position to negotiate an advantageous integration with the CIPD. Nor would it necessarily be to the advantage of the OD profession to merge with an HR / HRD professional association. As highlighted by one interviewee,

putting OD into the CIPD professional map was a '*bolt on*'. Applying the Greenwood et al. (2002) model of non-isomorphic change also highlights that should OD practitioners not institutionalise themselves through, for example, forming a professional association, they may be perceived as a fad or fashion.

In Institutional Theory, the drive for change is often assumed to come from the less embedded periphery of the profession which in this case would be from the OD practitioners. According to Greenwood and Suddaby (2006) one of the reasons for the motivation for change coming from the periphery is that those are the members of the profession most likely to be disadvantaged. However, in this case the change to include OD within its remit was driven by the CIPD, from the centre of the HR profession. The findings from this study will be examined for a potential explanation of this phenomenon in the section entitled *OD, HR, HRD – perceived importance, mimetic forces and agency* below.

## **■ The US-based OD Profession, its Institutional Status and Comparative Lack of Agency**

The existing literature highlights that the US OD profession rejected elements of professional convention, such as regulation, in favour of normative systems. The interview data highlighted signs of a quest for regulatory approach as a route to legitimacy in the UK through recognised qualifications. The preference in the US OD profession for a normative system appears to be at odds with their general national approach to the development of professions. Whether the lack of regulation was an element in the accounts of the decline in of OD in the US is worthy of consideration. One might argue they are neither *fish nor fowl*: the US OD profession had not actively pursued strengthening of their institutionalised status as a profession, but they have also simultaneously remained unyielding to business market forces.

Scott (2008b: 219), considered professions to be the '*Lords of the Dance*'. However, although that may be the case for professions such as medicine and law, in the context of the power of global organisations it is not the case for the OD profession.



This may be due to the profession of management being less established and/or less respected, meaning that legitimacy cannot be assumed (Hilmer and Donaldson, 1996). With stronger and embedded institutionalisation in professions such as medicine, law and engineering, quick fix practices based on flimsy evidence from those with no recognised academic or professional credentials would be completely dismissed (Hilmer and Donaldson, 1996). However in the less established professions within management, such as OD, new ideas tend not to be exposed to the same level of critical evaluation as they are in more established and institutionalised professions. Furthermore, in contrast to the perspective of Muzio et al. (2011), the consumers of the professional services of OD have overriding power in their relationship.

The literature provided several accounts of the US OD profession being under threat of extinction. Interview data described the US based OD Network and SHRM as having a more partnership approach. It appears that as professional institutions they have been less active in applying an agency approach to strengthen their institutional status than the CIPD has been in the UK.

### **OD, HR, HRD: Perceived Importance, Mimetic Forces and Agency**

The extent to which OD is advantaged or disadvantaged in comparison to HR and HRD communities, by being included in the professional CIPD community is revisited in this section. The content analysis and interview data highlighted that OD professionals are not disadvantaged in comparison to those at the centre of the HR profession. Interviewees clearly stated that they perceived OD to be of higher status than HR and HRD. This may have been due to the OD profession having gained power, and therefore status, by demonstrating success in dealing with sources of uncertainty in change situations within organisations (Scott, 2005). In the illustrative salary information in Chapter 5, the OD specialism was found to attract a salary premium greater than all other areas of HR, and the interview data also confirmed that OD was viewed as a more attractive specialist area. The incentive to

become an OD practitioner might therefore have been linked to a personal capitalism motivation, as identified by Thornton et al. (2012) as the economic system of professionals.

Given that individual actors have a level of partial autonomy from their social structure (Whittington, 2001), the motives of individual practitioners within HR, HRD and OD practice should be considered in addition to review of the interests of the CIPD. If there is a difference in status and earning potential between the domains of OD, HR / HRD, what might be the implication of that for individual practitioners? Would agency be exercised in order to transfer to a perceived higher status specialism within the profession? Greenwood and Suddaby (2006) outlined that changes in professions could arise from the actions of calculating and interest aware parties in the professional community. The interview data highlights that mimetic and agency forces are at work with regards to HR and HRD professionals seeking identification as OD practitioners. This was evident in the content of some job advertisements with OD in the title, yet the nature of the content primarily reflected mainstream HR responsibilities. This phenomenon was also reported in the interview data.

However, the sub-group of OD within the HR/HRD/OD professional grouping could also have competing personal capitalism and status interests in retaining their distinction, leading them to seek to control the intra-professional boundary (Greenwood et al., 2002). In the fashion perspective, Abraham (1991) outlines the phenomenon of higher reputation organisations disassociating themselves from those with a perceived lower status. When the fashions of the higher reputation groups were mimicked by lower reputation groups, in this case HR and HRD, they would adopt new fashions. Grint (1997) similarly describes how, in a social hierarchy, higher class groups engage in distancing behaviour when their norms are mimicked by a lower class group. This disassociation / distancing effect was also highlighted in the interview data, where it was noted that OD practitioners actively distance themselves from other HR professionals. There was evidence that at least

some OD professionals clearly wish for a distinct boundary between themselves and other HR / HRD professionals.

With regards to professional association, what is of interest was that a half (five of the ten) interviewees who are currently or had been OD practitioners, had not come from an HR background, and were therefore unlikely to have already had CIPD membership. It was also strikingly evident that six of these interviewees did not see HR as having an automatic place in OD, and two were clear that they did not wish to be associated with HR. As such, despite their strong UK institutional presence, the CIPD may find it difficult to engage UK OD practitioners to become part of their professional association.

Nevertheless, content analysis and interview findings highlighted that the OD professions inclusion in, or self-exclusion from, the HR / HRD community is not an *all or nothing* situation. Thornton et al.'s (2012) summary of DiMaggio and Powell's 1983 propositions, found that circumstances where OD practitioners are more likely to become morphed into mimicking HR are:

- where they are placed in a highly centralised organisation and dependent on resources from an HR function
- if they are in a context where the path to goal achievement is uncertain, then it is more likely to imitate another professional grouping, such as HR, if they consider it to be successful (although the reverse appeared to have been more common)
- if it is made easier to attain HR / HRD qualifications than OD qualifications, in organisations where academic and professional qualification is the norm
- where the organisation already has a high proportion of senior managers with an HR / HRD background and / or CIPD affiliation
- if there are fewer alternative models to achieve professional association status (such as an active and dominant OD professional association)

In relation to the existence of individual actor agency, one trend from the interview data which is of particular note is that with the exception of the academics in the

sample, responses tended to reflect interviewees' respective professional context. So, when the interviewee worked in a consulting capacity, there was a strong view that OD could only be effectively delivered by external consultants. When the interviewee was, or had been, in a generalist HR career area, their perspective was often that OD should be subsumed as a part of the HR function. Where the interviewee had no career experience in HR, the dominant view was that OD was and must remain distinct from HR. In short, the existence of agency to promote vested interests carried over into, and was therefore embedded within, the answers given in the interview process.

### The Application of Agency in Achieving Legitimation

The normative approach to legitimacy for professions was given as *morally governed*, (Scott, 2008a). Morality and professional values are discussed widely in the literature, but there is a marked absence in relation to the content analysis and interview data. There were signs of the development of isomorphic forces in the desire for legitimatisation of professional status, specifically in OD. This was evident from the interview data: it was significant that all three Senior Practitioners who moved into OD post 2005 had sought to become qualified in OD, and their responses indicated a perceived need to legitimise their place as *bona fide* OD practitioners.

It would seem that there was perceived advantage to all three of these highly qualified interviewees in order for them to have opted, mid-career, to gain an additional professional qualification in OD. One interviewee was effusive in her praise for the NTL programme she had completed. Two interviewees did not see their CIPD qualification as being sufficient for their OD practitioner status. This trend is aligned with the sociological view that professionals control their own work terrain and boundaries (Abbot, 1998; Muzio et al., 2011) as these individuals were actively marking themselves out as being different from HR / HRD professionals. As noted above, there may have been a significant vested interest for all three

interviewees to apply agency in order to create disassociation / distance and a clear boundary between them and other HR / HRD professionals.

### **Who Held the Influential Position in the Diffusion of Management Ideas, Fads and Fashions on OD?**

The bibliometric findings highlight that published work on OD is heavily dominated by US academics. However, in the UK practice model, OD was found to have diverged from the US form. The content analysis and interview data found that adopters varied OD by customising it to their preferences (Rogers, 2003). The source of influence in this diffusion appears to have come from fellow OD / HR professionals and from social system networks that had already adopted OD practice (Rogers, 2003).

In terms of Abrahamson's (1991), typology of four perspectives on the adoption of innovations it might have been expected that in the increased adoption of OD in the UK the *efficient choice perspective* was in operation: that organisations were free to choose. However, rising uncertainty in the achievement of business goals as a result of a turbulent global business environment may have been an external condition which acted as driver for change. In this context, the *fashion* or the *fad perspective* (Abrahamson, 1991) might have been responsible for the growth in OD roles.

The *fad perspective* might be considered as a more secure route for managers than the *fashion perspective*, in that they can demonstrate that they have done, or mimicked, what *similar* organisations with a higher reputation have done (Abrahamson, 1991). The context for increased use of OD professionals would involve mimetic forces being in operation where there was uncertainty and ambiguity (DiMaggio and Powell, 1991), and the perceived safest route for managers would be to mimic other organisations (Abrahamson, 1991). In this way, decision makers would appear to be making rational choices by following the advice

of OD professionals. Additionally, in their decision making, they would avoid the risk of being singled out from the norm (Grint, 1997).

The global business context is likely to continue to be turbulent and unpredictable, so it seems likely that there will be an ongoing need for practitioners competent in Change Management. In this context, managers will likely avoid personal career risk, by taking the option of deferring to highly institutionalised professionals for guidance. This implies a danger for OD if it does not become institutionalised, as it could be viewed as a passing fashion rather than a legitimate profession from which to seek authoritative advice.

With respect to the *forced selection* perspective in the adoption of OD, there is a level of state involvement within the public sector in the UK. As such, the possibility for a degree of forced selection / mimicking of other similar organisations, whether technically efficient or not, could be a feature in the growth of OD.

It was clear from the content analysis data that the magnitude of public sector roles in OD was, and became more, significant. It could be said that, in this way, the public sector mimicked the private sector in its initial take up of OD. Furthermore, the reduction in proportion of private sector roles may have resulted from private sector organisations actively distancing themselves from OD fashion adopted in what they perceived to be lower status public sector organisations. However, interview data does not suggest that this is the case. Interviewees who would be knowledgeable on this did not report any drop off in the use of OD professionals in the private sector. The observed reduction in advertised OD job roles is more likely to have resulted from the decreased use of hard copy media for recruitment purposes in the private sector.

However, there may have been isomorphic mimicry forces at work in the increase of the 'other' social enterprise sector. These organisations are often more like public than private sector organisations. Mimicry of public sector organisations may have taken place in the social enterprise sector as, in these smaller organisations where the route to goal achievement is less clear (DiMaggio and Powell, 1983),

security may be sought by mimicking other similar but more established institutions such as the NHS or Local Government. In addition, some *other sector* organisations may also have had established relational networks in place with public sector organisations, which would mean they were more inclined to mimic these organisations.

Abrahamson (1991) warned of pro-innovation bias, and Meyer and Rowan (1991) highlighted that there was much rationalised myth involved in developing institutions. Was a driver in the adoption of OD as a result of pro-innovation bias (i.e. that all innovation is good and should be embraced) and if so, are there consequences for OD? With the influence on the development of what constituted OD in the UK coming from the practitioner rather than academic community, there was scope for a lack of critical evaluation in the adoption of practice. This, in turn, could lead to OD being written off as being a fad or fashion. However, the prospect of dismissal of OD as a fad or a fashion relates to common usage of these terms, rather than necessarily as they are applied in Abrahamson's (1991) typology where there is specified meaning. According to Abrahamson (1991) fashions and fads are similar and are commonly adopted in uncertain conditions. The difference being that in fads the organisations mimicked are of a similar nature.

## Agency from Different Interested Parties

This chapter has discussed agency of practitioners, managers, professional associations and interviewees. However, a primary focus for this research is the comparison of academic and practitioner perspectives. It is assumed that academics are likely to take objective, evidence based, longer term and rigorous approaches to producing valid research findings (Blackler and Shimmin, 1984), and that they are more likely to be neutral commentators: using critical analysis to illuminate understanding of phenomena.

Abrahamson (1996b) and Collins (2000) argue that academics have a role in assisting managers to critically evaluate ideas and models from managerial fashion

for application in practice. However, although there is a compelling call from academics for more rigorous research and theory on OD to be developed (e.g. Bunker et al., 2004; Burnes and Cooke, 2012; Cummings and Feyerherm, 2003), this study found no evidence of UK based academics having yet responded to this need.

With few exceptions (e.g. Burnes and Cooke, 2012; Cheung-Judge and Holbeche 2011, 2015; Francis et al., 2012; Garrow, 2009; Oswick, 2009) little has been published on OD from the UK. Even from the small sample of UK based authors writing on OD, the Oswick (2009) article is embedded within a US OD academic community discussion. Most of the contributors to the Francis et al. (2012) text are practitioners, as are Cheung-Judge and Holbeche (2011, 2015). The bibliometric search found that other post 2005 UK publications on OD are led by the practitioner linked Institute of Employment Studies (where Garrow, 2009 was based) and Roffey Park, rather than from mainstream university based academic sources. Given the significant growth of UK practice and its divergence from the US OD model (highlighted in the content analysis), there is a notable absence of guidance from the academic community for the UK form of OD.

Since academics have an important role to play in assisting the OD practice world through the production of objective, rigorous research, it is notable that there is an absence of such research. It may be that there are also agency factors at work in the community of scholars. The career considerations of many academics may affect the area in which they focus their research. As Grint (1997) commented, academics publish primarily for an academic audience, with academic journal success being particularly important to career progression.

Some interviewees sought both clarity on, and convergence in OD, HR and HRD. It may be the role of academics to provide this clarity, and to advise practitioners on the convergence of these fields. However, as one academic interviewee highlighted, academics in OD, HR and HRD do not publish in the same journals as they draw from different theory bases. As such, the academic subject areas of OD, HR and HRD are significantly divergent, and potentially are so as a result of the agency of



academics seeking career progression through publication rather than due to issues of change in the practice world. However, there is evidence of potential change in this situation.

The bibliometric search made comparisons on the level of publishing of academic journal articles with OD in the title between 1970 and 2010, identifying if trends in publication were similar in the three main countries of publication; US, UK and Germany. In the US, publication levels were highest in the 1970s, dropping in each subsequent decade, with a negligible increase between 2000 and 2010. In contrast, in the UK publication rates were low in the 1970s (7), more than doubled in the 1980s (16), reduced to their lowest level in the 1990s (4), and grew significantly between 2000 and 2010 (14). Perhaps the primary influence in the diffusion of management ideas in the UK OD community were the practitioners who had led the trend of growth in the take up of OD, rather than the academics; as the literature would suggest should have been the case. Moreover, academics appeared to have responded to growing practitioner interest in OD.

### **PART 3. Debates on the Value of OD, Contemporary OD and the Prognosis for its Future**

#### **OD Presence and Development of OD Practice and Research**

In the main, OD is absent from UK HRM literature with what few comments there are tending to note that OD was *past its heyday* (e.g. Legge, 1995, 2005). In 2004 there was a dialogue between US scholars, such as that in the special issue of the *Journal of Applied Behavioural Science*, on the terminal decline of OD. Of all the findings of this study, perhaps the most striking is the extent to which the perspective of (particularly HR) UK and (OD) US scholars varies from UK practice. With few exceptions (see Burnes and Cooke, 2012; Dunn, 2009), academic rhetoric focuses on the deterioration of the OD profession. However, in contrast to this, content analysis findings in this study highlight the significant rise OD job role advertisements in the UK.

Existing literature on contemporary challenges for OD is, to a great extent, supported by findings from this study. The perspective of a number of academic interviewees was that OD practitioners were under particular pressure to become more knowledgeable of, and competent in dealing with, global and local business matters (Bradford and Burke, 2006; Church and Burke, 1995; Cummings and Feyerherm, 2003; Sharkey, 2009; Worren et al., 1999). The focus of OD should be on the quest for organisational effectiveness and this would require better processes for measurement and evaluation (Beer, 1976, Francis et al., 2012). This emphasis on the need for measurement and evaluation is reflected in the content analysis and interview findings.

OD practitioners have been warned to rely less on tools and techniques (Cummings and Feyerherm, 2003) and traditional domains of OD, such as over-riding adherence to humanistic values, and interpersonal and group process (Bradford and Burke, 2006; Shull et al., 2013), consistent with the literature, findings in this study suggested that OD professionals should become more flexible in response, context

relevant, competent in large system orientation, and be influential (Bradford and Burke, 2006; Cummings and Feyerherm, 2003). There appeared to be a call to increase the institutional status of OD, through recommendation for more clarity on what was core OD, and what was peripheral (Cheung-Judge and Holbeche, 2011; Bradford and Burke, 2004; Gallos 2006) and calls for greater regulation on membership and conduct (Bradford and Burke, 2004). All of these issues in the existing literature matched by what was found in the content analysis and interviews.

The content analysis and interview data indicated a weakening in the link between OD and its grounding in *Behavioural Science*. However, with the exception of Shull et al., (2013), this was rarely highlighted by scholars. The comparatively tangential references to new OD practices in the literature such as *Positive Organisational Scholarship, AI and Positive Psychology*, (Palmer et al., 2006) were given brief mention in a small number of interviews. The increased need to be more involved in shaping organisational leadership (see Sharkey, 2009) was evident in the content analysis, but less so in the interview findings. Increased commitment to employers (Shull et al., 2013), and a growing emphasis on linking work output to organisational performance for HR professionals (Becker and Huselid, 2006) was also evident in the interview data on the need for OD practitioners to be seen to contribute to the *bottom line*.

In looking to the future of OD, one area which was a feature of the literature, but absent from the content analysis and barely mentioned in interviews, was OD values and ethics. If the holy grail of OD was to achieve organisational effectiveness, it had opened itself to reproach as simply being a tool of senior managers (Burnes and Cooke, 2012). Cheung-Judge and Holbeche (2011) consider that the greatest challenge for OD professionals is the maintenance of integrity alongside business acumen. In 1999, French and Bell argued for the need for a more ethical approach to business. The call for an ethical approach has increased, and with the financial and organisational scandals of recent history, the necessity of values and ethics

have come to the fore (Burnes and Cooke, 2012). However concerns with issues of ethics and values were barely in evidence in the content analysis or interview data.

The need for more rigorous research in OD was not evident from the content analysis and seldom arose in interviews, but was of significance in the literature. Many academics argue that a primary issue facing OD is the lack of academic theory, rigour and research (Beer and Walton, 1987; Burnes and Cooke, 2012; Cummings and Feyerherm 2003). Furthermore they argue that this research should be aligned with applicability in practice (Bunker et al., 2004; Hutton and Liefoghe, 2011; Woodman, 1989) with a return to the use of action research (Burnes and Cooke, 2012). Burnes and Cooke (2012) also recommend that there is a need to produce reliable and valid research on which to assess reasons for failure in change programmes.

Given Beer's (1976) proposal that archetypes and robust theories increase the power and influence of OD, one might argue that demand for more rigorous theory from OD academics could be linked to greater institutionalisation and legitimacy of OD. Any increase in institutionalism should come, in part, from improving the supporting system of knowledge of OD practice. Proactive leadership in the development of the profession is also needed (Bradford and Burke, 2006; Gallos 2006). However, the literature and interview findings from this research found little evidence of this. There has been little evidence of leadership activity from UK academics, and US based scholars have focussed on issues such as dialogical approaches to OD. Professional organisations in the UK, Europe or the US have also yet to provide a clear and positive leadership role.

## Overall Prognosis

Although facilitating the optimisation of the release of '*human potential within organisations*', remains as an important role and focus of HR academics, (Bradford and Burke, 2004: 372), the OD community have been positioned as having lost their

relevance (Bradford and Burke, 2006). However the content analysis found that in the UK until 2010, OD skills continued to be in high demand.

The rise in demand for OD skills should be expected in a global environment where ongoing and complex changes are the norm (Gallos, 2006). Nevertheless, the way in which OD deals with the context of the failure of change efforts and becomes competent in loosening tight systems (as well as the other way round) will be important to future success (Burke, 2011).

A point highlighted in one interview was that a number of scholars have reported that the essential principles and processes of OD are well founded (e.g. Burnes and Cooke, 2012; French and Bell, 1999; Hutton and Liefoghe, 2011) and a return to core OD principles would be of value. It is thought to be particularly essential to restore *Lewinian* values of relevance and rigour in OD (Burnes and Cooke, 2012).

There have been a number of business disasters which have arisen from a lack of application of rigour in moral values by organisational leaders (Bradford and Burke, 2004). The fact that OD has retained its values at a time when they were considered to be old fashioned, should have been of value (Bradford and Burke, 2004).

However, the issue of the behaviour of top leaders in the context of turbulence or crises will be a defining factor (French and Bell, 1999). Whether the OD profession can prove capable and motivated to attend to difficult questions in a global society is important (Burnes and Cooke, 2012). Whatever the result, having an OD approach is vital in resisting short term expediency in favour of sustainable and embedded longer term change. Therefore, for this reason amongst others, in theory, OD is well placed for the future (Burnes and Cooke, 2012).

## Conclusion

In this chapter academic perspectives on OD (as depicted in the literature) were compared with data from the study; similarities were found, however there were significant differences. The data was analysed through reflection on the theoretical

position outlined in Chapter 2. The value and the nature of contemporary OD were examined and predictions for its future were presented. In the concluding chapter, the salient points from this chapter will be summarised. The issues which have been discussed will be reviewed in relation to how they compare with the questions raised in the introduction.

## Chapter 8. Conclusion

This chapter presents a summary of key findings from this research, relating them to the research questions. The originality, contribution and implications of the research for OD practice, professional associations and academics will also be discussed. Finally, areas for further research will be identified.

### Summary of Key Findings and Return to the Research Questions

#### 7.1.1 Findings

A summary of the most significant findings from this research are shown below.

The research identified broad agreement that:

- OD is difficult to define and has blurred disciplinary boundaries.
- Its early history was perceived as being dominated by USA based scholars.
- The CIPD has attempted to subsume OD practice within its professional association.
- OD skills will continue to be in demand in an increasingly complex global business world, where there is an ongoing quest to optimise the realisation of human potential.
- In the future, OD needs to be business competent, focused on large systems and context relevant.
- There is an increased emphasis on evaluating OD practice and identifying the link between activity and improved performance, through the development and application of metrics.

In several areas, the findings from this study did not match with findings in existing literature and thus identified key differences between academic perspectives and UK practice:

- Over four decades, the UK form of OD has diverged significantly from the traditional US model of OD. The content analysis profiles demonstrate that in the 1970s, OD in the UK was akin to the traditional US form of OD. The focus on *Change Management* grew in the next three decades. In the 1980s HR became the most prominent feature of UK OD, and in the 1990s this leading position was taken by HRD. In the period 2000 – 2010 OD became a broader discipline, and a *Strategic broad Organisation Wide* approach was evident.
- The extent of the link with HR and HRD in the UK was not generally acknowledged by academics. Mention of OD by prominent HR academics was all but absent.
- OD is considered as being of higher status and perceived to be of higher importance than other specialist areas of HR / HRD in the UK.
- US-based scholars presented the OD profession as though there was no national difference in its form.
- Issues of ethics, values and organisational power differences are of importance in existing literature and the view was given by scholars that they will become more so in the future of OD. However, these issues were not expressed as being of concern to OD practitioners.
- Although not addressed in the literature, it was clear from the interview data that the relevance of the form of OD practice should be informed by



the organisational context, particularly that of its size.

Other findings from this research were that:

- With the bank of written material produced, and embedded institutions such as the NTL (with a presence in the UK), US-based scholars continue to be the primary source for shaping what OD is considered to be.
- Traditional OD has developed with the increased use of techniques such as AI, large group and dialogical approaches. It has moved away from a positivist ontological base to embrace socially constructed reality.
- Whilst UK OD changed between 1970 and 2010, there were also many other changes of relevance in its environment. The nature of organisations and types of organisational change altered significantly. There were new categories of employees, such as *knowledge workers*, and the nature of employment (e.g. *flexible employee contract* categories) had developed. Other professions on the boundary of OD, such as Change Management, Consultancy and HR also changed in form.
- After 1980, interest in OD in academic publications waned in the USA, UK and Germany. However, the post 2000 resurgence of interest in OD was much stronger in the UK and Germany than it was in the USA, as shown by the increased number of journal publications found in the bibliometric search. This raises questions on whether in the dissemination of ideas, scholars and UK publication in OD have been influenced by the rise in the practice community.
- A call for increased institutionalism for UK OD was identified, in terms of a need to complete recognised training and qualification in OD. Within this was an appeal for clarity in relation to separation of core and periphery OD,

with a view to the field of OD becoming more distinct with clear boundaries and legitimate professionals.

- The most likely of Abrahams's (1991) perspectives in the adoption of OD were *fashions, fads* and *forced selection* rather than the take up of OD being mainly as the rational *efficient choice*.
- In an increasingly unpredictable global business world, the lowest risk strategy for managers is to make decisions which mimic other higher status organisations in their field, with deference shown to the advice of acknowledged, institutionalised, professional groups in order to justify decisions. As such, advantage may be gained by the OD profession by becoming more institutionalised through professionalisation.
- There is a need for more rigorous research in OD, particularly focusing on how it can contribute to successful change processes. This would legitimise OD as a profession and strengthen its institutional status.
- There is evidence of the application of agency to progress vested interests from a number of parties with respect to OD, including the CIPD and OD, HR, HRD professionals and academics, primarily within the context of isomorphic institutionalism.
- In a global business environment where there have been numerous financial crises and organisational scandals, the OD profession's acknowledged and long standing association with professional values should be valued as a contributor to ethical sustainable long term organisational change.

### 7.1.2 Return to the Research Questions and a Revised Definition

The research questions posed have been addressed as follows:

1. To what extent is there a difference between the academic literature and practitioners' perspective of the development of the OD profession in the UK?

The findings from this study suggest a significant difference between the academic literature and practitioners' perspectives of OD in the UK. In particular, there are few UK based academics who publish in the subject area of OD. Furthermore, there is a lack of recognition of OD by UK based HR academics. This completely at odds with OD's place in the practice world and the extent to which it is linked with HR and HRD in the UK.

2. What does the empirical data of this study evidence on the development of the OD profession in the UK in respect of its form, magnitude and perceived importance?

The UK form of OD was found to be much broader than traditional OD and the boundaries with HR and HRD particularly blurred. The OD profession was found to have grown in number over the four decades and appeared to be perceived as being of high status.

3. What are the forces at work which influence the development of the OD profession in the UK?

A range of forces were identified as being at work in influencing the development of the OD profession in the UK, with the most important factors accounted for in the key findings above. These include US based scholars dominating the thought world of OD; traditional OD having developed in terms of increasing its focus on organisational level issues; and the underlying philosophy of OD is declared to have moved from a positivist ontological to a socially constructed realist stance. In addition the environment OD operates in has also developed. For example: organisational forms, the nature of employment arrangements, types of employees

and other linked professions have changed. There are early signs of a resurgence of academic interest in the UK and Germany. In the UK this is arguably in reaction to growth in the practice of OD. The perceived need for OD practitioners to achieve legitimacy through formal qualification in OD is apparent and there is an appeal for clarity of its boundaries. The forces driving adoption of OD are not always rational and the application of agency by a range of stakeholders is evident. There is need for the application of more rigorous research to underpin OD practice. This would advantage the profession as would be an increase in its institutionalised professional status.

At the end of Chapter 3 the following definition of OD was developed by the author as informed by the literature: ***'OD involves planned change (at whole or sub) system level, with the goal of organisational effectiveness achieved through the application of OD - processes, tools and techniques and delivered by adhering to humanistic values'***.

In the light of the data collected in this study and some of the more unique views expressed in the literature the author has now revised this definition. Reference to *planned* change has been removed since there is no reason that this cannot be accompanied by e.g. emergent change, which was considered to be *'the first substantial alternative to OD'* (Burnes and Cooke, 2012, 1408).

A further influence on the revised definition is that organisation boundaries are increasingly porous and systems in themselves can be revolutionised, even the application of the description *transformation* is on occasion now not radical enough to describe changes in organisational forms. In the current era, there are now samples of organisations fundamentally changing their core purposes, such as in local government and health provision in the UK where organisations which once had the core purpose of providing service, are split into separate (and different core purpose) commissioning and provider organisations. Therefore, it is no longer simply *system* change, but could equally be *supra* and / or *sub* system change. In the light of the above, organisation design must now be core to OD. Success cannot

be achieved in the majority of OD endeavours, without active consideration of organisation design as a priority.

The final influence in the author's revised definition is consideration that *humanistic values* for application within practice within the *system* is no longer sufficient. Whilst still important, *humanistic values* should now be superseded now by wider societal concerns.

Furthermore the revised definition is now two-fold, including *Core OD* and *Non-Core OD*:

***'Core OD involves change in the system (at supra and / or sub system level), with the goal of achieving organisational effectiveness, through responsive and transformational / radical design of structures, OD - processes, tools and techniques reflecting consideration of needs of all stakeholders including wider society and employees.'***

***'Non-Core OD is where recognised applications of core OD - design, processes, tools, and techniques are used by professionals in boundary professions (such as HR, HRD, Change Management and Consultancy) in support of enhancing the delivery in their own professional practice'.***

Both of these definitions should include the following addition: ***'pertinent OD - design, processes, tools and techniques are those which result from rigorous academic research'***. However not all of these, even if recognized as tried and tested design, processes, tools and techniques clearly meet this standard.

## Originality and Contribution

### 7.2.1 Originality

The originality of this research study was assessed using the criteria set out by Phillips and Pugh (2005). This work produced an original contribution to knowledge by:

*'1 carrying out empirical work that has not been carried out before; 2 making a synthesis that hasn't been made before; 3 using already known material but with a new interpretation; ... 6 bringing new evidence to bear on an old issue; ... 8 looking at areas that people in the discipline haven't looked at before ...'*

Phillips and Pugh (2005: 62)

### 7.2.2 Contribution

In an earlier stage of this research, the content analysis data was published in the *International Journal of Human Resource Management* (Gillon et al. 2014a). The contribution to knowledge at that point was identified as being an extension of current thinking on OD by contrasting the research of academic scholars on the evolution of the HRM profession in the UK and USA.

Much has been written about the profession of OD, often in a prescriptive manner but with little empirical evidence to corroborate claims. Prior to this study, there was almost no substantiated information on the nature of the profession in the UK. This work makes a contribution to existing knowledge by presenting triangulated evidence on the nature of the form of the OD profession in the UK collected using transparent research methods. The review of job advertisements over a 40 year period provides robust data on the developing magnitude and form of OD and the nature of the elite interview sample supplies a richness of perspective.

This study has demonstrated that OD in the UK is not as described by the US-based scholars. This is also the first work which has investigated the development of OD through the lenses of Institutional Theory, Fads, Fashions and the Dissemination of Management Ideas. In doing so it has challenged the *given* understanding of the

form of OD, the context of how it has developed and why it has changed. From this work there are caveats for OD practitioners, OD professional associations and for scholars: these are presented below.

## **Implications for Practitioners, Professional Associations and for Academics**

### **7.3.1 Practitioners**

The implications of this research for UK OD practitioners are somewhat contradictory in nature. On the one hand, findings indicated a more diverse form of OD that is linked to HR and HRD and this had contributed to its growth in magnitude in the UK: whilst in the USA, stricter adherence to traditional OD, albeit with some new techniques and focus, resulted in challenge for the relevance of the profession.

On the other hand, there were potential benefits to be had by increasing the institutional status of OD through development of a more regulated qualification and professional association membership route. If this path was followed, then the profession was more likely to be able to manage a distinct boundary, and be less open to being dismissed as a fad or fashion.

Findings from this research have already been disseminated to UK OD practitioners in the NHS. The author was invited by the Head of OD for the NHS Employers Organisation to present her research to an event for 175 NHS OD Professionals in Bristol and as a result, was subsequently asked by the Head of OD for NHS Scotland to attend a Scottish Heads of OD network day. Three blogs, relating to this study, have been published on the NHS Employers organisation website (Gillon, 2014b, 2014c, and 2015a). Recently she was invited to write a regular blog for a Scottish based Recruitment Company (Gillon, 2015b).

### 7.3.2 Professional Associations

Ultimately, it may be that in the UK OD has now reached sufficient critical mass through organic growth and that the time is ripe for OD to strengthen its institutional status through the European OD Network, or similar. The CIPD is considered by some to have been predatory in its approach to subsuming OD. However, the CIPD action of including OD in its professional map could be either a comparatively half-hearted reaction to a clearly growing trend, or a failed attempt: since many OD practitioners actively engaged in distancing themselves from HR and HRD.

A significant finding from this research is the idea that there should be two forms of OD professional. One would be the highly specialised *pure* OD professional and the other would be a hybrid type - HR / HRD with OD skills alongside their other generalist and specialist skills. Whether increased institutionalism is achieved through an OD professional association or the CIPD is less important, as long as the *pure* form of OD is not tied to, and subsumed by, all of the norms of the CIPD but instead treated as an equal, albeit small, partner in the isomorphic process.

### 7.3.3 Academics

One key implication of this research for business and management academics is the need for recognition of the growth in the OD professional group, and the need for action to follow from that. In order to remain relevant, academics should be outward focussed and in a position to identify changes in business trends at an early stage. This would involve being less reactive and playing more of a leading and influential role in the development and shape of, for example, the profession of OD. There is something of a gap in leadership of the development of the profession in the UK, so that role is there for the taking.

For some time, there has been a focus on the need for relevance alongside rigour in academia (e.g. Starkey and Madan, 2001) and a focus on the necessity for the demonstration of research impact. This research study was by no means the first to identify that the embedded norms of career reward in academic publishing caused



unhelpful behaviour with regards to relevance and impact. However, in this study, the local academic subject domain effect identified was found to drive behaviour which resulted in a divergence of the academic subjects of OD, HR and HRD, as these disciplines apply different theory bases and traditionally publish in different journal communities. Conversely, findings indicate that a more converged approach to people management was required in practice, and is therefore in place.

Finally, the call for increasing rigorous research in OD and Change Management, if heeded, would be of great benefit to both academic and practitioner communities. The production of valid, impactful and rigorous research would promote the relevance of the academic community, and provide a source of legitimisation for the practice community.

## Areas for Future Research

Limitations of this research were identified in the methods chapter, some of which could be addressed in future research projects. Another primary opportunity for further research would be to more rigorously examine the corresponding development of the OD profession in the USA and other countries. The relationship of OD and its contribution to Change Management is also a possible area for further work, and a more in depth study of the use of OD in specific sectors might also prove to be of interest and value.

Although methodologically difficult for comparison a follow up study in five years' time, on the development of OD during the period 2010 – 2020, would be of interest. However, the area which might be of most use to the practitioner community would be to utilise the data from this study as a starting point to clarify what is core and peripheral in OD.

## ■ Finally ... the Puzzle Is Solved (But Not Resolved)

In the introductory chapter, the author explained how she had uncovered a puzzle which had not made sense to her. In particular, her experience of OD as a thriving and growing profession in the UK was not reflected in the academic literature. At the end of this work, the puzzle has been solved. Her experience was indeed reflected in the volume of OD job roles found in the content analysis exercise, and further confirmed in the interview findings.

The researcher now better understands the actions of the OD (and HR and HRD) professional community in the UK, and their underpinning motivation. For business leaders a more converged model to managing people issues makes sense. Often HR and HRD practitioners are keen to subsume OD within their fold. For OD professionals, it is a double edged sword: convergence with HR and HRD could make them more relevant, but divergence could achieve a perceived status advantage. The researcher also now has a clearer grasp that the OD, HR and HRD academics in the UK have diverged in these subject areas and why that is the case.

However, whilst the puzzle has been solved, it has not been resolved, especially for community of scholars. The divergence of the subject areas, and the reasons for that, are now understood. Scholars have been dominated by the US thought on what constitutes OD. In the UK they appear to often have little meaningful interface with the world outside of universities, or at least they are not incentivised to make this a priority. Ultimately, in an era when there is rhetoric on an increasing focus on relevance and impact, the divergence in the communities of OD, HR and HRD, academics might yet prove to be their Achilles heel.

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## Appendices

## **Appendix 1.1 Abbreviations**

AI: Appreciative Inquiry

AMED: Association of Management Education Developers

BAM: The British Academy of Management

BPR: Business Process Engineering

BRIC: Brazil, Russia, India, China

CEO: Chief Executive Officer

CIPD: Chartered Institute of Personnel Development

HR: Human Resources

HRD: Human Resources Development (this has also been used as a generic label for specialisms within HRD – so for e.g. Learning and Development, Training, or Management / Leadership Development)

HRM: Human Resource Management (note HR and HRM are used relatively interchangeably, scholars (in particular in the USA) more often use the term HRM, whereas in UK practice HR is more often used)

IPD: Institute of Personnel Development (later the CIPD)

IPM: Institute of Personnel Management (later the CIPD)

ITD: Institute of Training and Development (later the CIPD)

MD: Managing Director

NHS: National Health Service

NTL: National Training Laboratory

NTU: Nottingham Trent University

OB: Organisation Behaviour

OD: Organisation/al Development, Organizatio/nal Development

ODS: Organisation Design

ODV: Organisation Development

OE: Organisation Effectiveness

OT: Organisation Transformation

OTCD SIG: The Organisation, Transformation, Change and Development Special  
Interest of BAM

QWL: Quality of Working Life

SHR Strategic Human Resources

SHRM: Strategic Human Resource Management (the USA professional body for HR  
– similar to the CIPD in the UK)

SME: Small to Medium Enterprises

TQM: Total Quality Management

UK: United Kingdom

US: United States

USA: United States of America

## Appendix 4.1 Publications issued to CIPD (and its predecessors) members

Publication a: main publication		Publication b: secondary publication
1a. 'Welfare Work'  Monthly Jan 1920 / June 1931		
2a. 'Labour Management'  Bi- Monthly July 1931 – Feb / Mar 1946		
3a. 'Journal of the Institute of Personnel Management (IPM)'  Bi- Monthly Jun / July / Aug 1946 – Nov / Dec 1946		1b. 'IPM Members Bulletin'  Irregular June 1953 – Sept 1957 & Feb 1960 – Dec 1964
4a. 'Personnel Management'  Monthly Jan / Feb 1947 – Sept 1967		2b. 'IPM Digest'  Monthly April 1965 – June 1990
5a. 'Personnel'  Monthly Dec 1967 – April 1969		3b. 'PM Plus'  Monthly July 1990 – May 1993
6a. 'Personnel Management: the magazine for Human Resource Professionals'  Monthly Dec 1969 – Dec 1994		4b. 'Personnel Management Plus'  Monthly June 1993 – Dec 1994
<b>7a / 5b</b> <b>'People Management'</b> Bi-Monthly <b>Jan 1995 to current</b>		

## Appendix 4.2 First scoping search for Content Analysis: CIPD Archive

### Search for Jobs Advertised with OD in the title

The first times the CIPD (predecessor) professional organisation issued a regular publication to members which contained job advertisements:

- January 1967 – in IPM Digest (a Monthly publication)
- December 1967 – in Personnel Management (a Monthly publication)

Personnel Management was a more full publication which alternated with the IPM Digest and was therefore selected for the initial evaluation of adverts. The archive of Personnel Management copies available are from December 1969, therefore in order to check if there were OD jobs occurring in that period, a review of job adverts in the IPM Digest between January 1967 and December 1969 was carried out as follows:

#### IPM Digest

Period Reviewed	Sample Selected	Result
December 1967 – December 1969	Every 4 <sup>th</sup> copy	No jobs with OD in title or in the narrative of the advertisement

The next stage was to identify when OD job adverts first appeared in **Personnel Management** by doing a review of one publication **each June** in a 5 year period from January 1970:



Year Reviewed	Result
1970	
1975	
1980	
1985	<p>No jobs with OD in title</p> <p><b>2 jobs with OD type content in the narrative of the advertisement</b></p>
1990	<p>No jobs with OD in title</p> <p><b>2 jobs with OD type content in the narrative of the advertisement</b></p>

*Table Key – the result column has been left blank where there were no jobs with OD in title or in the narrative of the advertisement*

Since there were jobs with OD content occurring in both the 1985 and 1990 sample, a check of the June publication on an annual sampling basis was carried out as follows:

Year Reviewed	Result
1980	
1981	
1982	
1983	1 job with tangential OD type content in the narrative of the advertisement
1984	
1985	2 jobs with OD type content in the narrative of the advertisement
1986	
1987	
1988	1 job with OD in the title
1989	

*Table Key – the result column has been left blank where there were no jobs with OD in title or in the narrative of the advertisement*

### Appendix 4.3 Coding Dictionary

Terms Coded	Codes
Change/ing, Change Management, Strategic Change, Vision, Change Programme, New Direction, Future, Transform/ational/ing, Expansion, Adapts, Growth, Growing, Develop/ments (in relation to the service / business), New Organisational Arrangements, Inception, Regeneration, Merge/r, Innovative plans, Innovation, Modernising	Change Management
Project/s, Intervention/s, Programme/s, Consultant/cy, Action Research, Initiatives, Clients	Consultancy Orientation
Culture/al/s, Behavioural, Values, Inspire, Motivate, Modernised, Responsive, Hearts and Minds, Psychology, OB, Team Building, 'Way of Working', 'WorkingTogether', Personal Change	Cultural Issues
HR, Operational HR, Generalist HR, Workforce / Manpower Planning, Recruitment, Retention, People Management / Issues, Employment Law, Reward, Job Evaluation, Personnel, Pay and Grading, Resourcing, Equal Opportunity (responsibility for)	HR
Learning, Coaching, Education, Training, Succession Planning, IIP, Career Path/ing / Planning / Management, Talent, Competence/ies, Develop/ed / development / growing (when linked to learning / skills / leadership / managers/ staff / people / workforce, personal), HRD, 360 Degree Feedback	Learning and Development
OD, Organisation Development, Organisational Development, Organisation/al Analysis / Design / Structure(s), Job Design, Facilitation	OD
Effective/ness, (Organisational) Capability, Business Objectives, Performance/ing, Improvement (s), Human Capital, Productivity, Infrastructure, Value (for money, added, best), (Measurable) Outcomes, Equipping us to be a world class ..., Excellence, Commercial Contribution, Ensure Success, Service Delivery, Consistent with ... service ... Objectives, Business Intent, Fully Exploit, Business Benefits, Efficiency, Successful, Best Value, Better Services. Modernise, Exceed Targets, First Class, Results, Service Level Agreements, Highest Standards	Effectiveness
Culture of ... continuous learning, Change Capability, People / leadership capability/ies, Organisational Capability, Capacity, Shaping an organisation ...fit for future, Continual/ly/ed Improve/ment, Growth, Organisational Success, (Continuous) Improvement, Drive for Improvement, Resilient, Agile, Learning Culture / Organisation	Organisational Learning Orientation

Partner/ship, Engaging / Engage/ment, Stakeholder(s), Customer, People Centric Perspective, Well Being, Working to develop the best employer ..., Involved/ment, Joint Working, All Staff Work as One Team, Collaborative, Employee Relations, Inclusive, Staff Surveys, Multi Agency / Service, 'Each and every employee', Intra (Organisation), Working Relationships, Liaise. 'Embraced by every individual', 'Working closely with', 'Work productively with', Consultative/on/ing, 'Draw In', 'Working Together', Integration	Partnership Issues
Strategic, Strategy/ies, Overall Direction, Big Picture, Policy, Executive, Board / Highest ... Level(s)	Strategic Approach
Leader/s/hip, Manage/r/ment, Head Up, Shaping	Leadership
Beyond HR, Outside ... HR, Corporate / Board, Across ... boundaries / force businesses / organisation / the council, Governance, Wider influence of HR, Overall Approach, Executive, Business Needs / Function / Focus / Oriented / Processes / Goals / Objectives / Development / Plans, Commercial Experience / Awareness / Acumen, Commercially Oriented / Throughout (the organisation), Entrepreneurial, Building Business, Wider Organisation, Key role (linked to business success), Customer Need, Top Team, Client Expectations, Steer the Organisation, Aligning Business, Service Delivery, Organisational Problems 'Impacts Top Management', Holistic	Organisation Wide (Not just HR)
Interpersonal Skills, Build / Effective Relationships, Relationship Management, Influence/ing, Communicate/ion/or, Personal Characteristics, Political Awareness, Enthusiasm, Persuasive, Maturity, Inspire/ation, Winning Clients, Resilience, Facilitation, Champion, Dynamic, Negotiation, Credible/ity, Motivating, Passion, Character, Mobilises, Constructive/ly, Outgoing	Interpersonal Skills

## Appendix 4.4 Subject Experts Interviews - reason for selection as interviewee

(Key for 2<sup>nd</sup> column: A = Academic; SP = Senior Practitioner; BL =Business Leader; L/I; Leader / Influencer)

Listed in chronological order of interview

		Name	Role Title and Reason selected for interview
1	A	Mrs Anne Stevenson	<p><b>Human Resource Management Group Lead at Robert Gordon's University in Aberdeen.</b></p> <p>In this role Mrs Stevenson has led on mainstream CIPD HR programmes at undergraduate and post graduate level for more than 2 decades. It was considered appropriate to have at least one academic who has been involved in teaching mainstream CIPD linked HRM programmes, including experience of delivery outside of the UK. Also with more than 2 decades of experience of HRM, it was judged that a degree of longitudinal comparison could be sought from this interviewee. Mrs Stevenson has also served as Chair of her Regions CIPD Branch.</p>
2	SP	Dr Chris Donegan	<p><b>Partner, The Change Navigators - Organisation Change and Management Consultants.</b></p> <p>At the time of interview Dr Donegan was the Chair of the CIPD for the East of Scotland Region. He was co-author of "Emotion at Work" in 2012 a chapter in: Organisational Development : A New Agenda for Organisational Effectiveness – Edited by Helen M. Francis, Linda Holbeche, Martin Reddington. Dr Donegan was also of interest since his foundation profession was as a Psychologist and he held a senior role in this, Training and Development and in HR in a variety of public and private sector organisations over the decades of his career.</p>
3	A	Professor Marie McHugh	<p><b>Dean of the Ulster Business School, The University of Ulster</b></p> <p>At the time of the interview Professor McHugh was the Editor in Chief of 'Leadership and Organizational Development Journal'. This in itself was considered to be an important reason to approach her to request an interview, although her experience leading her to that role was expected to provide information of interest.</p>
4	A	Professor Richard Thorpe	<p><b>Pro-Dean for Research, Leeds University Business School, Professor in Management Development</b></p> <p>Since OD appears to be considered by some to have connections / its roots in Human Resource Development (HRD)</p>

			and may even be considered to be synonymous with Management Development, it was thought appropriate to select an academic who specialised in Management Development. Professor Thorpe is highly regarded and holds / has held national positions in academic research; therefore he was also considered as an interview who would comment within the context of significant knowledge of the Business and Management research community.
5	L/I	Dr Linda Holbeche	<p><b>Co-Director of the Holbeche Partnership</b></p> <p>Dr Holbeche started her career as a practitioner, she is a prolific author (including two recent and highly regarded books on OD); she is an esteemed writer with influence in practitioner and academic communities. She is a Visiting Professor in 3 UK Universities and has links with others. She was previously a Director of Research for the CIPD. Dr Holbeche is regularly cited in UK leading HR thinkers lists.</p>
6	A	Professor Helen Francis	<p><b>Director, Edinburgh Institute of People and Organisational Development (EIPOD)</b></p> <p>Since there was a comparative dearth of contemporary academic text of UK origins on the subject of OD, it was considered appropriate to interview Professor Francis as lead editor of the book published by CIPD in 2012: Organisational Development: A New Agenda for Organisational Effectiveness</p>
7	SP	Mr Geoff Matthews	<p>At the time of the interview Geoff was <b>Vice President, HR Strategy - Merck Group at Merck KGaA</b></p> <p>Previously Mr Matthews had been: Vice President, HR Strategy &amp; Organizational Development at Merck Serono. Prior to working for Merck, he held Senior European roles in HR at Roche and at Hewlett Packard.</p> <p>Mr Matthews completed the CIPD Postgraduate Certificate in the Psychology of Organisational Development and Change.</p> <p>He was also co-author of a book on Employee Engagement with Linda Holbeche.</p> <p>Mr Matthews was chosen since he had held a range of Senior HR and OD roles in a European context and with 3 different multinational organisations. The sectors he had worked in were also a different sector from that of the other practitioners interviewed.</p>
8	SP	Ms Joanne Ramsay	At the time of the Interview Ms Ramsay was <b>Director of Organisational Design and Development Standard Life.</b>

			<p>Prior to this, she held the position of Head of OD at Scottish Power.</p> <p>Ms Ramsay was selected since she had held 2 Head of OD roles in large companies in sectors that no other interviewees had worked.</p>
9a	BL S/P	Mrs Karen Scott	<p>At the time of the Interview Mrs Scott was <b>Managing Director, Hudson Global Resourcing, UK and Ireland.</b></p> <p>Prior to this she had been Senior VP of HR at Damovo and European Director of HR for the Polaroid corporation.</p> <p>Mrs Scott was selected for interview on the basis of being an MD of a multi-million pound business, her decades of senior HR roles in multinational companies and for her knowledge of employment across sectors (in her role at Hudson she has regular contact with CEO and HR Directors in Scotland, England and Ireland – across all sectors). In addition Mrs Scott could provide expert views in trends in recruitment processes across all sectors.</p>
9b		Ms Shirlie Leighton	<p><b>Interactive Manager at Hudson Global Resources.</b></p> <p>Ms Leighton was invited into the interview with Karen Scott to give information on trends in advertising – hard copy and online.</p>
10	SP	Ms Liz Lambert	<p><b>Head of OD Oxfam.</b></p> <p>The researcher sought to interview a senior practitioner from the social enterprise sector and opted to approach a large well known organisation. The researcher contacted the HR Director and Ms Lambert was recommended as an interview subject.</p>
11	A	Professor John Burgoyne	<p><b>Professor of Management Learning and Leadership at Lancaster University.</b></p> <p>The researcher attended an ESRC funded seminar at Lancaster University at which Professor Burgoyne was presenting. He mentioned OD during his presentation and the researcher thought it would be useful to follow up to hear his views in more detail. With the length of time he had been in academia, it was considered he might be able to provide views from an earlier era than other subject interviewees and he was indeed able to talk of experiences from the late 60s onwards.</p>

12	A	Professor David Collings	<p><b>Professor of Human Resource Management at Dublin City University.</b> He is also a Visiting Professor of HRM at King's College London.</p> <p>Professor Collings is one of three editors of Human Resource Management Journal, a 3* ABS ranked journal – and a primary source for the output of work, particularly for UK based HR scholars. It was considered appropriate to get the view of an HRM scholar who is highly regarded by HR research academics to the extent of having been appointed as Editor of an important academic journal for the HR research academic community in the UK.</p>
13	A	Professor James Hayton	<p><b>Professor of HRM, Warwick University.</b></p> <p>Professor Hayton serves as Editor-in-Chief at Human Resource Management, and a member of the editorial boards of Human Resource Management Review, and the Journal of Chinese Human Resource Management. He is a member of the American Psychological Association, and an active member of the Academy of Management.</p> <p>With his recognition from USA based academic scholars, it was considered useful to get a view from an HRM academic who had more experience of the USA academic context of HRM</p>
14	A	Professor Bill Cooke	<p><b>Head of the Department of Organisation, Work and Technology, Lancaster University.</b></p> <p>Professor Cooke (with Professor Bernard Burnes) had just published The past, present and future of organization development: Taking the long view (Burnes, B. &amp; Cooke, B. (2012) In: <i>Human Relations</i> 65 (11) 1395-1429. This was clearly an article which would be of relevance to this research project. The PhD Director of Studies had also informed the researcher that Professor Cooke had recently found new evidence on the origins of The Tavistock Institute (and therefore the origins of OD in the UK), and this was also going to be of interest to this research.</p> <p>Professor Cooke has been involved with the Critical Management Studies Interest Group of the US Academy of Management and as such it was also potentially going to be useful to have an interview with someone from this ontological stance.</p>
15	L/I	Ms Claire Bishop	<p><b>HR Capability Manager, CIPD</b></p> <p>Ms Bishop is responsible for the CIPD's global professional standards and the HR Profession Map, including research,</p>



			<p>use and communication. OD is now in the CIPD professional map, so it was useful to understand how the map had been developed. Since this map will be used by HR professional to guide them in developing their careers, the map is in this regard potentially very influential. The map will also be used by those providing education programmes in HR to determine the content of the programmes.</p>
16	BL	Professor Paul Martin	<p><b>Depute Principal At UWS</b> prior to this Paul held roles as <b>Chief Nursing Officer and Director for Health Workforce for Scotland</b>. Prior to this Paul <b>was Chief Executive, Highland Primary Care NHS Trust</b>, a post he took up in July 2002.</p> <p>Having held senior roles in the NHS and Scottish Government as well as at UWS meant that Professor Martin could be asked to give comparisons from his experience of OD in 3 different forms of public sector organisation.</p>
17	BL SP	Mr Steve Phoenix	<p><b>Chief of General Hospitals &amp; Organisation Development at Hamad Medical Corporation</b></p> <p>Previously a Chief Executive in the NHS having moved into General Management for an HR Director role in the 1990s. Having held Senior General Manager and HR positions in the NHS in the UK, Mr Phoenix is now in Qatar so there is the opportunity to understand how UK practices are implemented in another country and culture.</p>
18	L/I	Dr Mannie Sher	<p><b>Principal Researcher / Consultant, The Tavistock Institute</b></p> <p>With those involved with the origins of The Tavistock Institute being so closely related to those considered as founders of OD in the USA, it was judged as to be of great use to get a view from someone who had a good knowledge of both the history of The Tavistock and of its operation in the current era. Dr Sher is one of the longest serving members of staff at The Tavistock and has developed and directed the world-renowned Leicester conference Authority, Leadership Organisation.</p>
20	B/L	Ms Amanda McMillan	<p><b>CEO Glasgow Airport</b></p> <p>Ms McMillan joined BAA from Diageo in 2005, to take up the post of Customer Services Director. At Diageo she was the Project Manager, Global Supply Finances and prior to that the Head of Diageo Business Services. She was granted an OBE for her services to the tourism industry in 2013.</p> <p>Given Ms McMillan's senior leadership experience with</p>

			these two organisations in different sector, and the organisational complexity of an international airport, it was considered that her views would be of value in this study.
19	SP	Mr Tarik Chawdry	<p><b>Asst. Director of HR at Birmingham City Council</b> (Award Winning for HR &amp; Business Solution).</p> <p>In terms of sector mix, local government is such a large UK employer, it was appropriate to get a view from a Senior Practitioner in this sector. Birmingham City Council's HR function has won national awards for their approach.</p>
21	SP	Ms Yvonne Anderson	<p><b>HR Director, Campbell Dallas LLP</b></p> <p>Campbell Dallas is the Leading Scottish independent chartered accountant Campbell Dallas has won the UK Employer of the Year at the 2010 Accountancy Age awards. Prior to this role, Ms Anderson was the HR Team Manager at Esure and before this an HR Advisor at Morgan Stanley.</p> <p>With many of the other interviewees coming from large and multinational organisations, it was important to include a view from someone in an organisation that is a very successful over the long term but is smaller and nationally based.</p>

#### **Appendix 4.5 Other Subject Experts considered / approached but who were not interviewed .... Or 'the ones that got away'!**

Role	Reason for selection	Reason interview was not done
Europe Director, EasyJet and 'People Director' before that.	One of the interviewees mentioned him in her interview from his work as People Director with EasyJet. Also, to have him as an interviewee would mean including an interview from a different sector from other interviewees.	The researcher tried to contact him via LinkedIn and via the EasyJet website – but was not able to get access to him to secure an interview.
Principal Research Associate with the Institute of Employment Studies	She has published on the subject of OD.	The researcher had already managed to secure interviews with several academic subject experts, there started to be nothing new coming out of these interviews. This subject expert has published in the subject area and the

		publications will be referred to in the literature review. It became more important to get more practitioner and business leader interviews secured.
Joint Executive Head of Human Resources at London Boroughs of Sutton and Merton	When the researcher did a Google search to find a leading Local Government Senior Practitioner, she found him in the 'Top 30 most influential HR directors 2011' and Finalist for HR director of the year award 2012. The researcher wanted to secure an interview with someone from Local Government.	The researcher e-mailed him twice but received no reply. In the meantime she met a fellow PhD student who worked in the HR function at Birmingham City Council, so followed that up as a possibility instead.
VP Operations, Ethicon, Johnson & Johnson	<p>He was the researcher's former line manager when he was a Plant Director at Polaroid.</p> <p>He was in a senior leader in a manufacturing role in a sector the researcher had no other interviewees from, however Karen Scott (who was interviewed had worked in that organisation).</p>	The researcher emailed the potential interviewee and he said he would have been happy to give an interview but was based in Egypt on a long term project. He was emailed a second time, but he did not respond.

### Appendix 4.6 Pilot Interviews

Initials	Date	How and Where	Reason selected for interview	Knowledge of person before / how introduced
CB	16/01/12	Meeting room in HR at UWS	OD practitioner at UWS but also with 2 decades line management and HR experience at Allied Distillers	The researcher had previously been this interviewee's manager (in her prior role as Deputy Director of HR / OD at UWS). They had always worked in a collaborative spirit and take feedback from each other openly.
JR	17/01/12	Cafe at UWS	Lecturer in HR at UWS, also previous experience as an HR Director in the Hospitality industry	This lecturer had worked together with the researcher teaching on modules – and was held in high regard by the researcher for her professional approach and practitioner experience
AE	23/01/12	His office	Assistant Director of HR / OD at UWS. Previously UK Head of L & D for the Cooperative.	This interviewee was the researcher's replacement in the HR role when she moved to an academic role. In this regard he would occasionally be in contact with the researcher to pilot processes he was developing with someone in an academic role.

## **Appendix 4.7 Pilot Interview format and notes of changes from the feedback**

Semi-structured interviews PhD Thesis research

Introduction

- Explain the background to the research and stages completed so far.
- There are no 'right or wrong' answers – it is the interviewees' views and perceptions that are of importance to the research project.
- I will not be as interactive as I might be in a normal conversation. It is important that I do not give leading comments. However, I will give clarification, but please feedback if you think I have 'led' you at any point. After the interview – I will then be happy to give you information on my findings to date.
- I will make notes during the interview, my 'write up' will be sent back to you for correction, until you are fully comfortable that my notes reflect your views.
- Refer to the coding dictionary in Appendix 1 and explain how it was developed

Check that signed off ethical approval form is in place.

### Structured questions

Critical Incidents:

a) When was the first time you recall hearing of 'OD' (or organisation/al development)

b) As a discipline; your most recent significant experience

c) Who is the best 'OD' person you have met – what is it about them that you think makes them successful. Who is the best HR person you have met – and what makes them successful?

d) How important do you think the following are in the contemporary OD profession (across sectors – not just in your organisation)?

(Please see the sample below for how to record your view)

	1	2	3	4	5	
	Very important	Important	Neutral	Unimportant	Very unimportant	Don't know
Change Management						
Consultancy Orientation						
Culture Issues						
Behavioural Science Issues						
HR						
HRD (Human Resources Development)						
OD						
Effectiveness / Performance (individual, team or organisational)						
Organisational Learning Orientation						
Partnership Issues						
Strategic Approach						
Leadership						
Organisation Wide (Not just HR)						

Repeating the question from HRM - how important do you think the following are in the contemporary HRM profession (across sectors – not just in your organisation)?

(Please see the sample below for how to record your view)

	1	2	3	4	5	
	Very important	Important	Neutral	Unimportant	Very unimportant	Don't know
Change Management						
Consultancy Orientation						
Culture Issues						
Behavioural Science Issues						
HR						
HRD (Human Resources Development)						
OD						
Effectiveness / Performance (individual, team or organisational)						
Organisational Learning Orientation						
Partnership Issues						
Strategic Approach						
Leadership						
Organisation Wide (Not just HR)						

Do you think this has become more or less important for OD and in the HRM profession IN THE LAST 40 YEARS?

	1	2	3	4	5	
In the last 40 Years	It has become much more important	It has become more important	Neutral	It has become less important	It has become much less important	Don't know
Change Management						
Consultancy Orientation						
Culture Issues						
Behavioural Science Issues						
HR						
HRD						
OD						
Effectiveness / Performance (individual, team or organisational)						
Organisational Learning Orientation						
Partnership Issues						
Strategic Approach						
Leadership						
Organisation Wide (Not just HR)						



How important do you think OD skills and practice are in providing a contribution to making HRM a more strategic, 'value added' and /or a 'value creation' organisational contributor?

	1	2	3	4	5	
OD Skills / practices in:	Very important	Important	Neutral	Unimportant	Very unimportant	Don't know
Making HRM a more strategic organisational contributor?						
Contributing to HRM becoming a 'value added' contributor?						
Contributing to HRM becoming a 'value creation' contributor?						

### **Structured themes / semi-structured questions**

For the rest of the interview, what follows is a guide to the areas to be covered – depending on the response you give; the follow up questions may vary. This research is exploratory research – the purpose of these questions is to explore your views and experience.

- What is OD?
- Do you consider OD to be intervention oriented (and is it ‘problem’ or proactively driven)?
- Who are the key players in OD?
- Who ‘owns’ OD?
- Do you consider OD to be a subset of HRM or the other way round?
- How do you evaluate the success of OD?
- Do you consider those to be successful at OD to be as a result of their technical OD / HRM skills – or is it more of an ‘x-factor’ / emotional intelligence / individual characteristic of the individual?
- Do you think your organisation’s OD function operates as it ‘should’?
- The changes in OD over the decades
- Please look at the information provided in appendix 1 – is there anything in this data you would have expected / not expected?
- What are your views on the ‘Evolution’ of OD, HRM and HRD – are they separate populations, are they now (or have they in the past) converged as functions, are they now (or have they in the past) diverged?
- Do you consider ‘current’ OD in the UK to be that of the original (behavioural science) model which emanated from the USA and the Socio-technical systems work from the 1950/60s?
- What part does OD play in ‘Strategic HRM’?
- Do you consider OD to be a management fad or fashion?
- How would you define contemporary OD?
- Is there a difference between OD – if you describe it as a profession, function, activity?
- What comments do they have on how the rhetoric of the adverts from Appendix 2 over the decades?
- Are there any underlying themes in OD and HRM which remain unchanged over the decades?

### Job advertisements

a) What influence do you consider advertisements to play in the formation and change of identity for a professional grouping?

b) Are they drivers of a trend in professional identity or do they follow fashion?

In your experience are advertisements 'true' reflections of the jobs advertised (and if not, do they still have a bearing on our perception of trends in job roles?)

If not already covered, could you please give me your thoughts on the following according to what category you fall in to:

Your position	Please give a view on:
Academic	Any differences between practice and academic rhetoric? If so, your views on this paradox are also of interest for this project.
Senior OD / HRM practitioner, Business Leader, Lead body representative, contemporary business author (on OD)	Your view of OD practice:  Past, present, future. What is ODs fundamental nature? What is its relationship to HR and HRD? Who owns OD? Do the results surprise you?

(To be asked only when there is a category where I need further interviewees) Is there anyone else who you think I should interview?

Finally - anything else you would like to add?

NOTES FROM YOUR INTERVIEW WILL BE WRITTEN UP AND I WILL SEND THEM BACK TO YOU FOR CHECKING / CORRECTION / ADDITIONS / OMMISIONS.

THANK YOU VERY MUCH FOR YOUR TIME AND CONTRIBUTION. THIS IS KEY CONTRBUTION TO MY PhD RESEARCH THESIS.

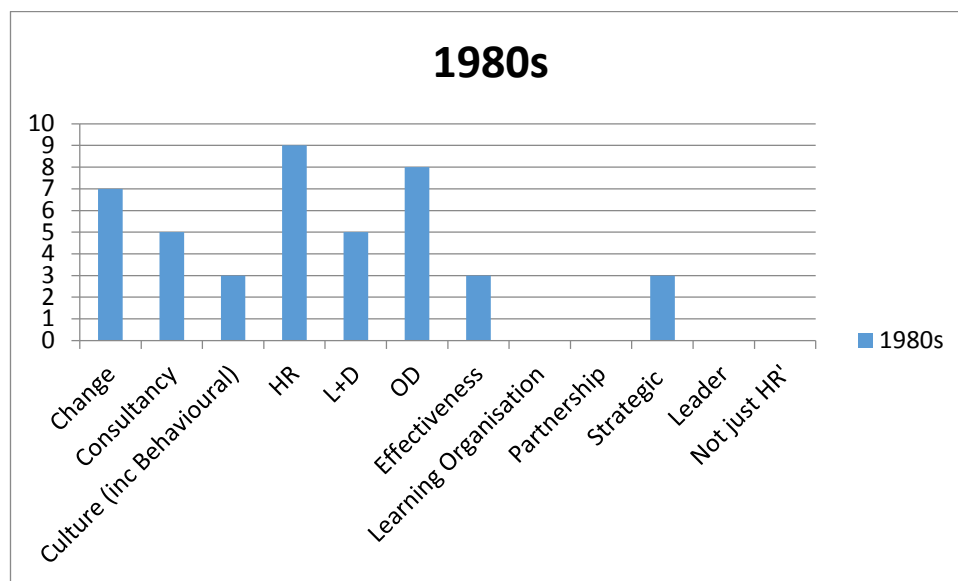
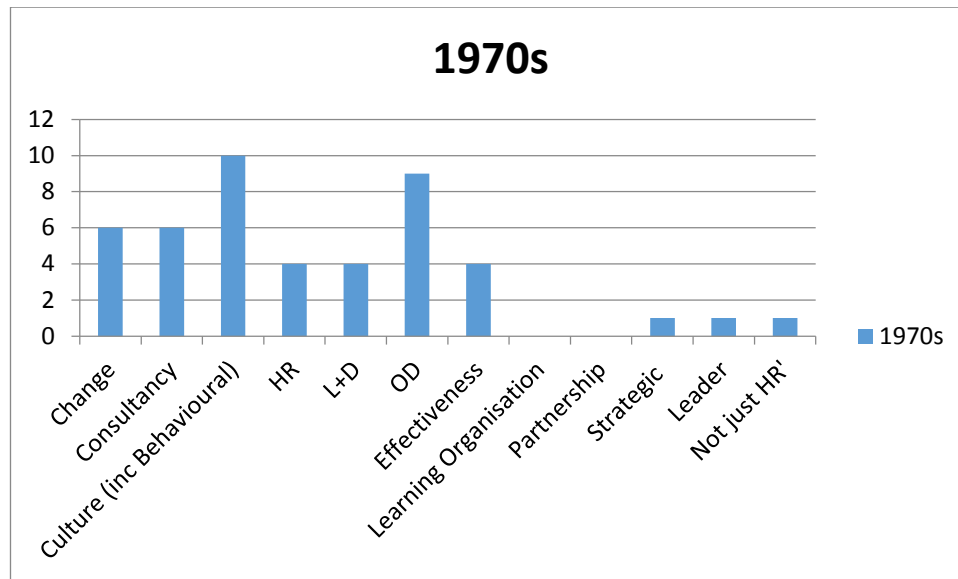
## APPENDICES FOR INTERVIEW

## Coding Dictionary

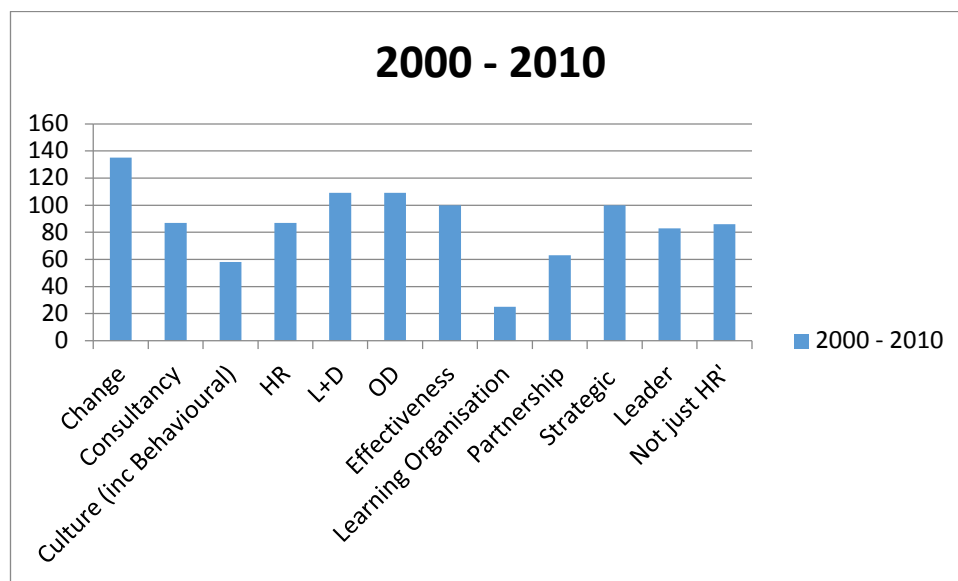
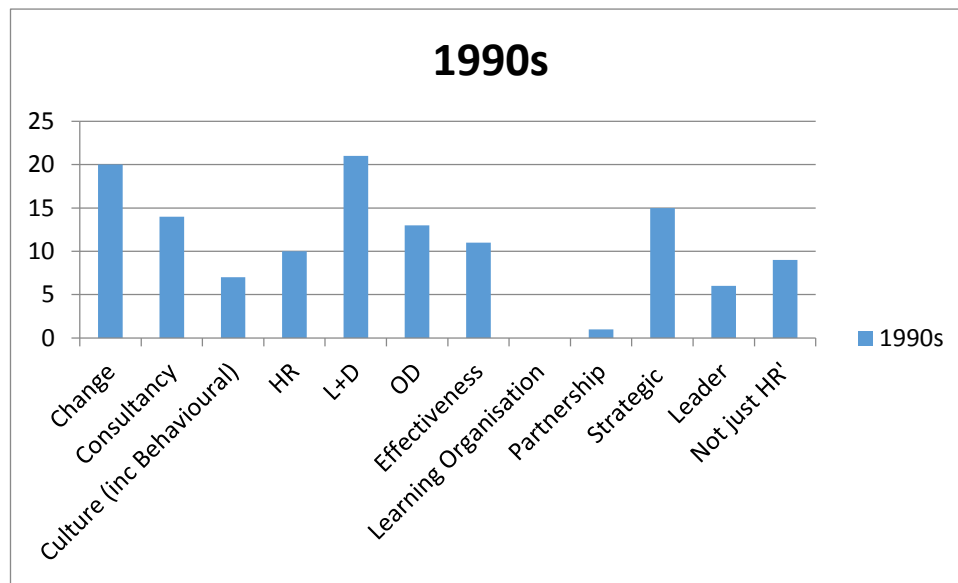
Terms Coded	Codes
Change/ing, Change Management, Strategic Change, Vision, Change Programme, New Direction, Future, Transform/ational/ing, Expansion, Adapts, Growth, Growing, Develop/ments (in relation to the service / business), New Organisational Arrangements, Inception, Regeneration, Merge/r, Innovative plans, Innovation, Modernising	Change Management
Project/s, Intervention/s, Programme/s, Consultant/cy, Action Research, Initiatives, Clients	Consultancy Orientation
Culture/al/s, Behavioural, Values, Inspire, Motivate, Modernised, Responsive, Hearts and Minds, Psychology, OB, Team Building, 'Way of Working', 'Working Together', Personal Change	Cultural Issues
HR, Operational HR, Generalist HR, Workforce / Manpower Planning, Recruitment, Retention, People Management / Issues, Employment Law, Reward, Job Evaluation, Personnel, Pay and Grading, Resourcing, Equal Opportunity (responsibility for)	HR
Learning, Coaching, Education, Training, Succession Planning, IIP, Career Path/ing / Planning / Management, Talent, Competence/ies, Develop/ed / development / growing (when linked to learning / skills / leadership / managers/ staff / people / workforce, personal), HRD, 360 Degree Feedback	Learning and Development
OD, Organisation Development, Organisational Development, Organisation/al Analysis / Design / Structure(s), Job Design, Facilitation	OD
Effective/ness, (Organisational) Capability, Business Objectives, Performance/ing, Improvement (s), Human Capital, Productivity, Infrastructure, Value (for money, added, best), (Measurable) Outcomes, Equipping us to be a world class ..., Excellence, Commercial Contribution, Ensure Success, Service Delivery, Consistent with ... service ... Objectives, Business Intent, Fully Exploit, Business Benefits, Efficiency, Successful, Best Value, Better Services. Modernise, Exceed Targets, First Class, Results, Service Level Agreements, Highest Standards	Effectiveness

Terms Coded	Codes
Culture of ... continuous learning, Change Capability, People / leadership capability/ies, Organisational Capability, Capacity, Shaping an organisation ...fit for future, Continual/ly/ed Improve/ment, Growth, Organisational Success, (Continuous) Improvement, Drive for Improvement, Resilient, Agile, Learning Culture / Organisation	Organisational Learning Orientation
Partner/ship, Engaging / Engage/ment, Stakeholder(s), Customer, People Centric Perspective, Well Being, Working to develop the best employer ..., Involved/ment, Joint Working, All Staff Work as One Team, Collaborative, Employee Relations, Inclusive, Staff Surveys, Multi Agency / Service, 'Each and every employee', Intra (Organisation), Working Relationships, Liaise. 'Embraced by every individual', 'Working closely with', 'Work productively with', Consultative/on/ing, 'Draw In', 'Working Together', Integration	Partnership Issues
Strategic, Strategy/ies, Overall Direction, Big Picture, Policy, Executive, Board / Highest ... Level(s)	Strategic Approach
Leader/s/hip, Manage/r/ment, Head Up, Shaping	Leadership
Beyond HR, Outside ... HR, Corporate / Board, Across ... boundaries / force businesses / organisation / the council, Governance, Wider influence of HR, Overall Approach, Executive, Business Needs / Function / Focus / Oriented / Processes / Goals / Objectives / Development / Plans, Commercial Experience / Awareness / Acumen, Commercially Oriented / Throughout (the organisation), Entrepreneurial, Building Business, Wider Organisation, Key role (linked to business success), Customer Need, Top Team, Client Expectations, Steer the Organisation, Aligning Business, Service Delivery, Organisational Problems 'Impacts Top Management', Holistic	Organisation Wide (Not just HR)

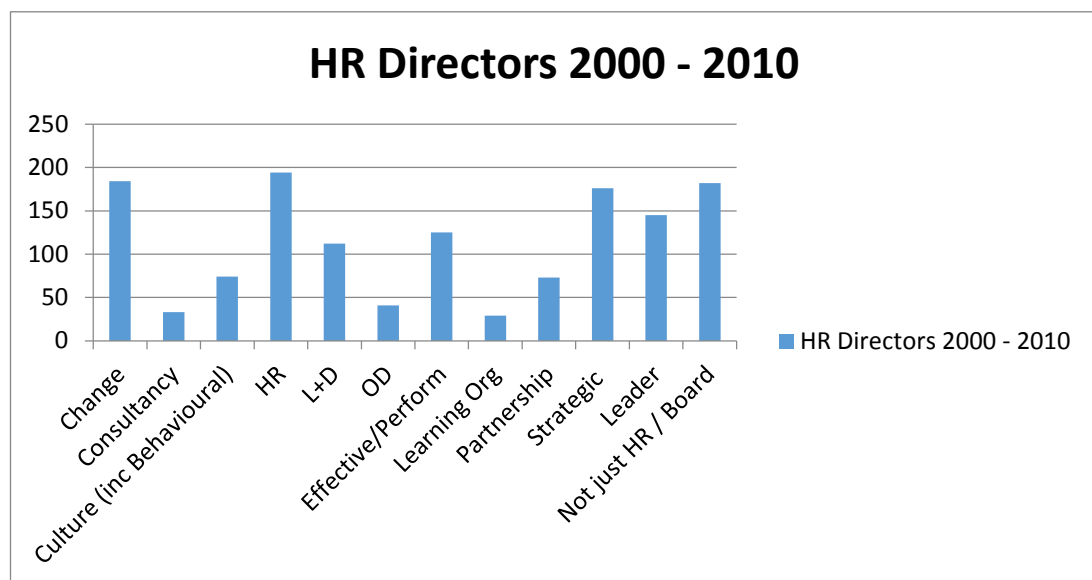
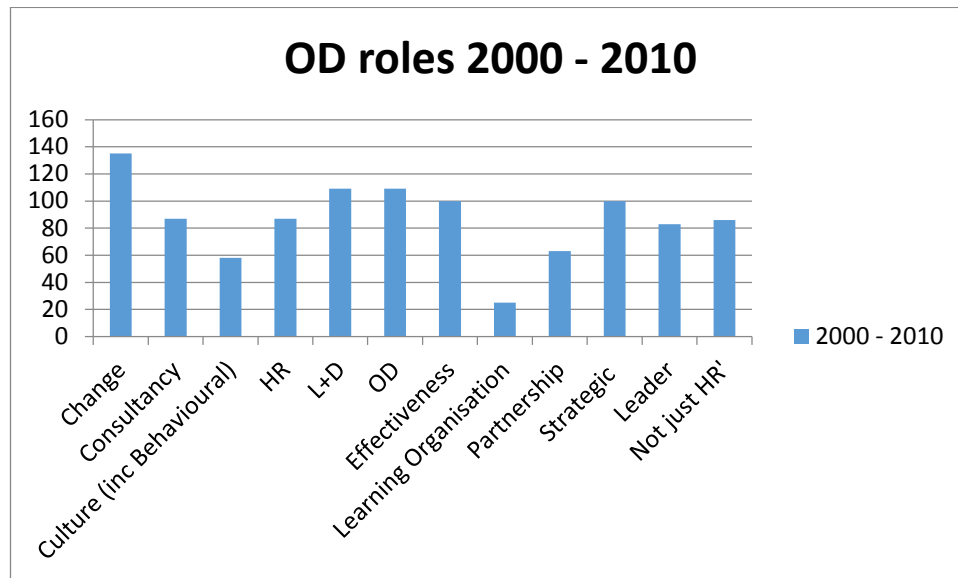
## OD Job Roles



## OD Job Roles

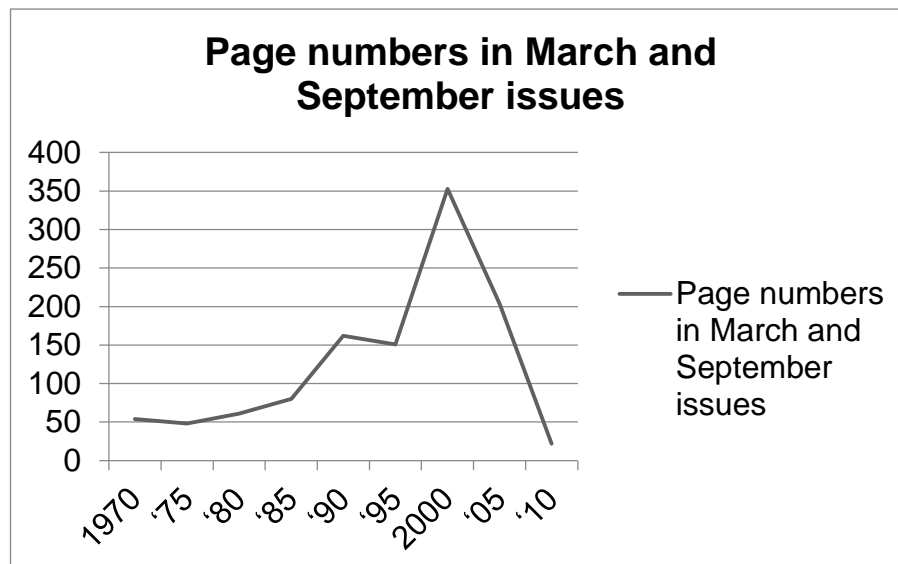
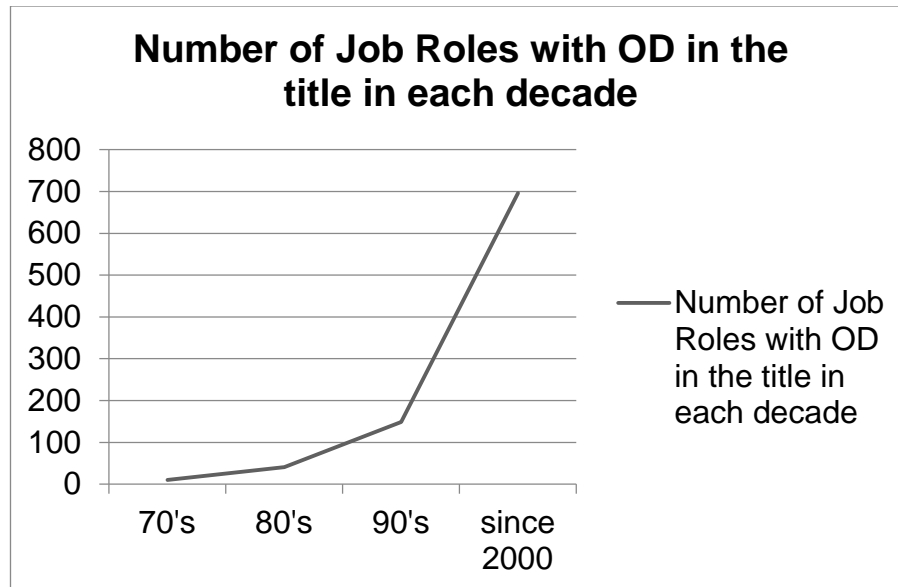


2000 – 2010 OD role profiles compared with HR Directors (in the same period)





Number of Job Roles with OD in the title – over 4 decades



## **Pilot Interviews Feedback Notes**

As a result of the pilot interviews – the following points were changed in the interview format.

### ***Interview 1 – 16<sup>th</sup> January 2012***

- 2 minor changes to cover letter
- Suggested change to the order vis a vis the informed consent levels
- Need to cover some points in the preamble: background, no 'rights or wrongs', what happens with the notes, level of interaction and the requirement for interviewer not to 'lead' the interviewee, difference between 'should' happen and 'actually' happens in practice
- Show the coding dictionary earlier – explain how it was developed
- Take notes during the grid questions completion – this may work as a quantitative exercise, but may not depending on what the accompanying narrative is
- The answer to question 2 depends on when THEY first heard of OD – they may not have a 40 year knowledge – so a note needs to be made for when the era from which they can answer this question
- Number all of the questions – for clarity when referring back to notes
- Add in questions around:
  - Do they consider OD to be intervention oriented ('problem' or proactively driven)?
  - Who are the key players in OD?
  - Who 'owns'?
  - Do they consider OD to be a subset of OD or the other way round?
  - How do they evaluate the success of OD?
  - Do they consider those to be successful at OD to be as a result of their technical OD / HRM skills – or is it more of an 'x-factor' / emotional intelligence / individual characteristic of the individual?
- Some explanation of question 10 and 11 (early / USA models of OD / HRM) may be required, but provide this information only after checking if they are aware of those models.
- Change the last set of graphs for HRD's – only use one for all post 2000 job roles – the comparison with the OD co-hort for the same era will then become more direct.
- Preferred to have the interview information in advance – including the advertisements

- What advertisements cover can often bear no resemblance to the actual job
- Found the number of advertisements acceptable, if the number is reduced – then take more along
- Interviewee fed back that the interview process was comfortable, interesting and thought provoking. There was only one occasion where I was in danger of leading a response. Some response / interaction from the interviewer, during the interview, is necessary, otherwise it would feel uncomfortable.

### ***Interview 2 – 17<sup>th</sup> January 2012***

Many points similar to the first interview AND

- Suggestion that the cover letter is more clear about the time the interview will take
- ‘Culture’ and ‘Behavioural Science’ need to be separated out, they have much in common, but they are fundamentally different in the way that they are perceived
- Add in a question on – are there any underlying themes in OD and HRM which remain unchanged over the decades?
- Could add in a question about ‘who’ the most successful OD / HRM person they have met – and why they considered them to be successful.
- Put headings on the groups of questions – to give a little more orientation in the interview
- ‘Window dressing’ goes on, terms and descriptions are often used by those who do not carry through in practice, they are following fashion, ‘lipstick is sometimes put on the gorilla’ to provide the desired image
- Found the number of advertisements acceptable – preferred to have at least that number to jog memory
- Would be better to put a score through the adverts that were not the OD ones – so it is clearer which ones to look at
- Interviewee fed back that the interview process was comfortable, thought provoking and enjoyable. There were no occasions where I had been considered to lead a response. An appropriate level of clarification was provided when required

After the first 2 interviews, the changes were made prior to testing the revised interview process in the 3<sup>rd</sup> pilot interview

***Interview 3 – 23<sup>rd</sup> January 2012***

- Separate question 3 into question 3 & 4 – otherwise there is not enough room and it becomes too complicated to explain to the interviewee – also – it helps to have them respond to one separately from the other. Clarify these relate to the profession in general not in own organisation – but do add in one question about OD in their organisation
- Take off ‘interpersonal skills’ off the coding dictionary – it is not being used in this part of the research
- Review the questions on advertisements - take out one of the questions
- Mark the year of the adverts more clearly next to them
- Laminate the coding dictionary and the graphs – easier to handle, if possible laminate the advertisements
- Prepare one advert which has been coded – use highlighter pen to show the coding
- For later analysis - present questions 3, 4, 5 and 6 as being on a Likert Scale – by showing the numbers 1-5 to represent a scale

*29<sup>th</sup> January 2012*

## Appendix 4.8 Format 1 Semi-structured Research

### Introduction

- Explain the background to the research and stages completed so far.  
There are no 'right or wrong' answers – it is the interviewees' views and perceptions that are of importance to the research project.  
I will not be as interactive as I might be in a normal conversation. It is important that I do not give leading comments. However, I will give clarification, but please feedback if you think I have 'led' you at any point.  
After the interview – I will then be happy to give you information on my findings to date.
- I will make notes during the interview, my 'write up' will be sent back to you for correction, until you are fully comfortable that my notes reflect your views.
- In the pilot interviews, interviewees often mentioned a difference between the way they felt things 'SHOULD' work and the disparity between that and their experience of how things 'DO ACTUALLY' work in practice. Therefore you will be asked for both points of view.
- Refer to the coding dictionary in Appendix 1 and explain how it was developed.

**Check that signed off ethical approval form is in place.**

### Structured questions

1. Critical Incidents:
  - a) When was the first time you recall hearing of 'OD' (or organisation/al development)
  - What are the most significant changes in your understanding of OD:
  - b) as a discipline;
  - c) your most recent significant experience
2. Who is the best 'OD' person you have met – what is it about them that you think makes them successful. Who is the best HR person you have met – and what makes them successful?

3. How important do you think the following are in the contemporary OD profession (across sectors – not just in your organisation)? Please differentiate between 'SHOULD' and 'DO ACTUALLY' work (by writing in S or A).

**(Please see the sample below for how to record your view)**

	1	2	3	4	5	
	Very important	Important	Neutral	Unimportant	Very unimportant	Don't know
Change Management						
Consultancy Orientation						
Culture Issues						
Behavioural Science Issues						
HR						
HRD (Human Resources Development)						
OD						
Effectiveness / Performance (individual, team or organisational)						
Organisational Learning Orientation						
Partnership Issues						
Strategic Approach						
Leadership						
Organisation Wide (Not just HR)						

**SAMPLE:**

	Very important	Important	Neutral	Unimportant	Very unimportant	Don't know
Change Management	S	A				
Consultancy Orientation		S	A			

4. Repeating the question from HRM - how important do you think the following are in the contemporary HRM profession (across sectors – not just in your organisation)? Please differentiate between ‘SHOULD’ and ‘DO ACTUALLY’ work (by adding S or A).

**(Please see the sample below for how to record your view)**

	1	2	3	4	5	
	Very important	Important	Neutral	Unimportant	Very unimportant	Don't know
Change Management						
Consultancy Orientation						
Culture Issues						
Behavioural Science Issues						
HR						
HRD (Human Resources Development)						
OD						
Effectiveness / Performance (individual, team or organisational)						
Organisational Learning Orientation						
Partnership Issues						
Strategic Approach						
Leadership						
Organisation Wide (Not just HR)						

**SAMPLE:**

	Very important	Important	Neutral	Unimportant	Very unimportant	Don't know
Change Management	S		A			
Consultancy Orientation		S			A	

5. Do you think this has become more or less important for OD and in the HRM profession IN THE LAST 40 YEARS?

	1	2	3	4	5	
In the last 40 Years	It has become much more important	It has become more important	Neutral	It has become less important	It has become much less important	Don't know
Change Management						
Consultancy Orientation						
Culture Issues						
Behavioural Science Issues						
HR						
HRD						
OD						
Effectiveness / Performance (individual, team or organisational)						
Organisational Learning Orientation						
Partnership Issues						
Strategic Approach						
Leadership						
Organisation Wide (Not just HR)						



6. How important do you think OD skills and practice are in providing a contribution to making HRM a more strategic, 'value added' and /or a 'value creation' organisational contributor?

	1	2	3	4	5	
<b>OD Skills / practices in:</b>	<b>Very important</b>	<b>Important</b>	<b>Neutral</b>	<b>Unimportant</b>	<b>Very unimportant</b>	<b>Don't know</b>
Making HRM a more strategic organisational contributor?						
Contributing to HRM becoming a 'value added' contributor.						
Contributing to HRM becoming a 'value creation' contributor.						

### **Structured themes / semi-structured questions**

For the rest of the interview, what follows is a guide to the areas to be covered – depending on the response you give; the follow up questions may vary. This research is exploratory research – the purpose of these questions is to explore your views and experience.

#### **What is OD?**

7. Do you consider OD to be intervention oriented (and is it 'problem' or proactively driven)?
8. Who are the key players in OD?
9. Who 'owns' OD?
10. Do you consider OD to be a subset of HRM or the other way round?
11. How do you evaluate the success of OD?
12. Do you consider those to be successful at OD to be as a result of their technical OD / HRM skills – or is it more of an 'x-factor' / emotional intelligence / individual characteristic of the individual
13. Do you think your organisation's OD function operates as it 'should'?

#### **The changes in OD over the decades**

14. Please look at the information provided in appendix 1 – is there anything in this data you would have expected / not expected.
15. a) What are your views on the 'Evolution' of OD, HRM and HRD – are they separate populations, are they now (or have they in the past) converged as functions, are they now (or have they in the past) diverged?

b) Comparison between the states of the profession in the UK with that in other countries is also welcome.

16. Do you consider 'current' OD in the UK to be that of the original (behavioural science) model which emanated from the USA and the Socio-technical systems work from the 1950/60s.
17. What part does OD play in 'Strategic HRM'?
18. Do you consider OD to be a management fad or fashion?
19. How would you define contemporary OD?
20. Is there a difference between OD – if you describe it as a profession, function, activity?
21. What comments do they have on how the rhetoric of the adverts from Appendix 2 over the decades?
22. Are there any underlying themes in OD and HRM which remain unchanged over the decades?

### **Job advertisements**

23. a) What influence do you consider advertisements to play in the formation and change of identity for a professional grouping?  
b) Are they drivers of a trend in professional identity or do they follow fashion?
24. In your experience are advertisements 'true' reflections of the jobs advertised (and if not, do they still have a bearing on our perception of trends in job roles?)

25. If not already covered, could you please give me your thoughts on the following according to what category you fall in to:

<b>Your position</b>	<b>Please give a view on:</b>
Academic	Any differences between practice and academic rhetoric? If so, your views on this paradox are also of interest for this project.
Senior OD / HRM practitioner, Business Leader, Lead body representative, contemporary business author (on OD)	Your view of OD practice:  Past, present, future. What is ODs fundamental nature? What is its relationship to HR and HRD? Who owns OD? Do the results surprise you?

26. (To be asked only when there is a category where I need further interviewees) Is there anyone else who you think I should interview?

27. Finally - anything else you would like to add?

NOTES FROM YOUR INTERVIEW WILL BE WRITTEN UP AND I WILL SEND THEM BACK TO YOU FOR CHECKING / CORRECTION / ADDITIONS / OMMISIONS.

**THANK YOU VERY MUCH FOR YOUR TIME AND CONTRIBUTION. THIS IS KEY CONTRBUTION TO MY PhD RESEARCH THESIS.**

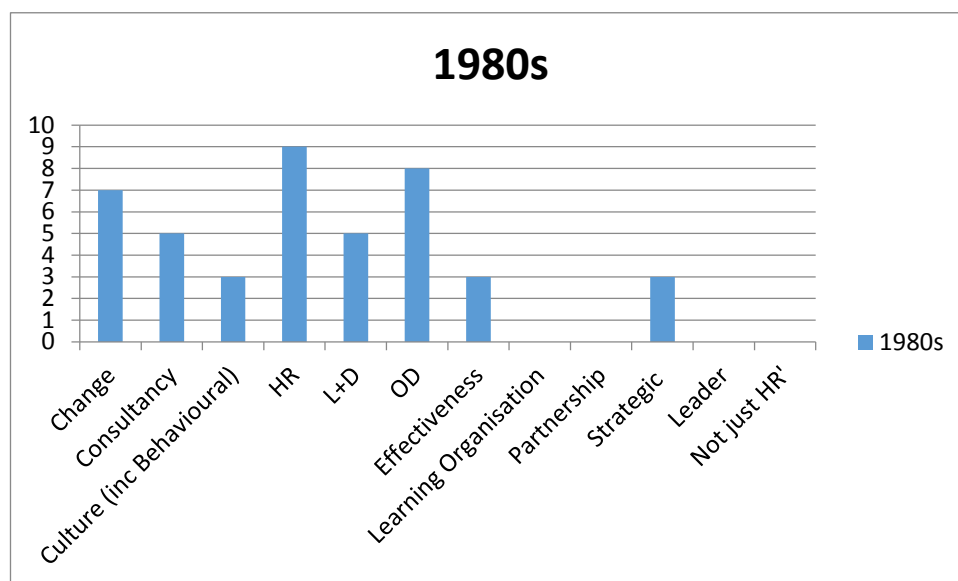
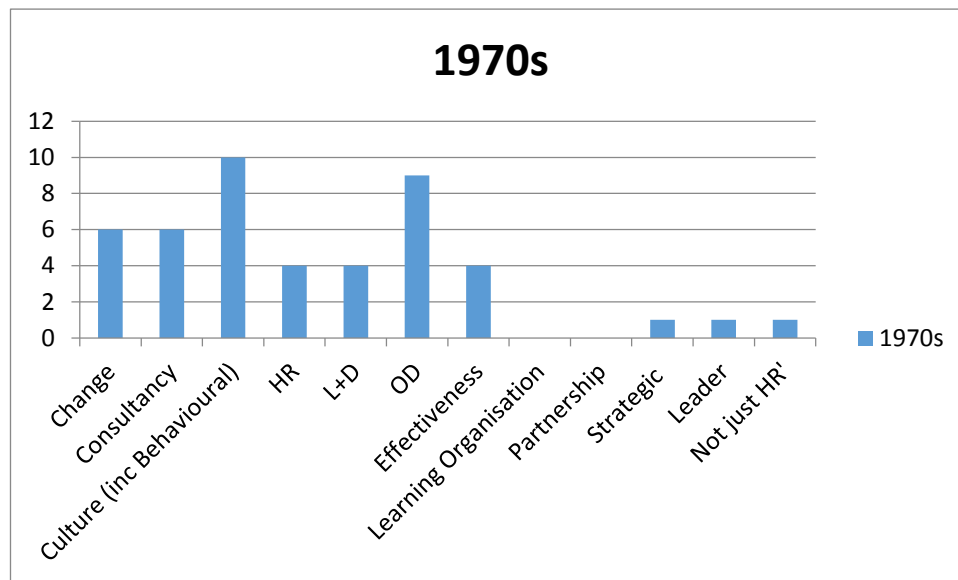
## APPENDICES FOR THE INTERVIEW

## Coding Dictionary

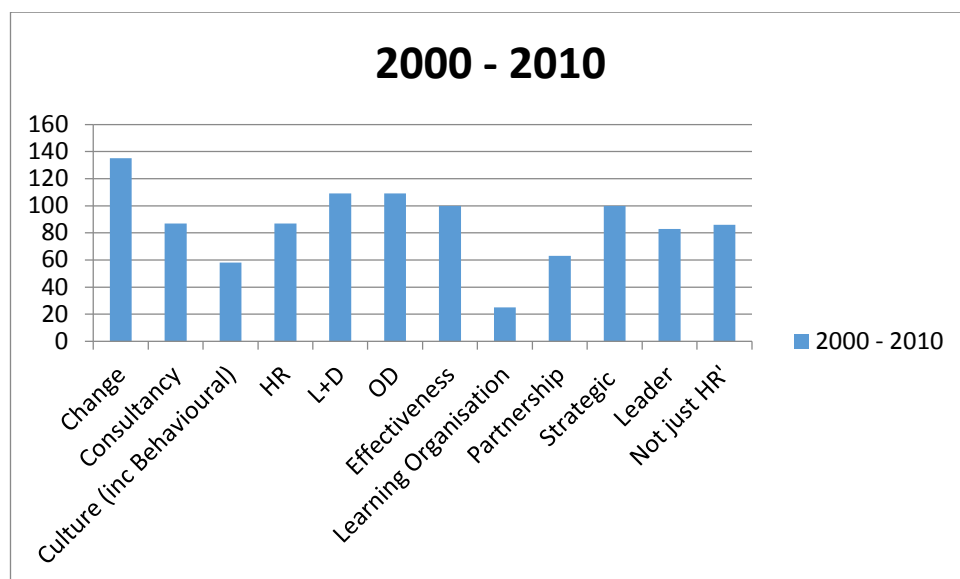
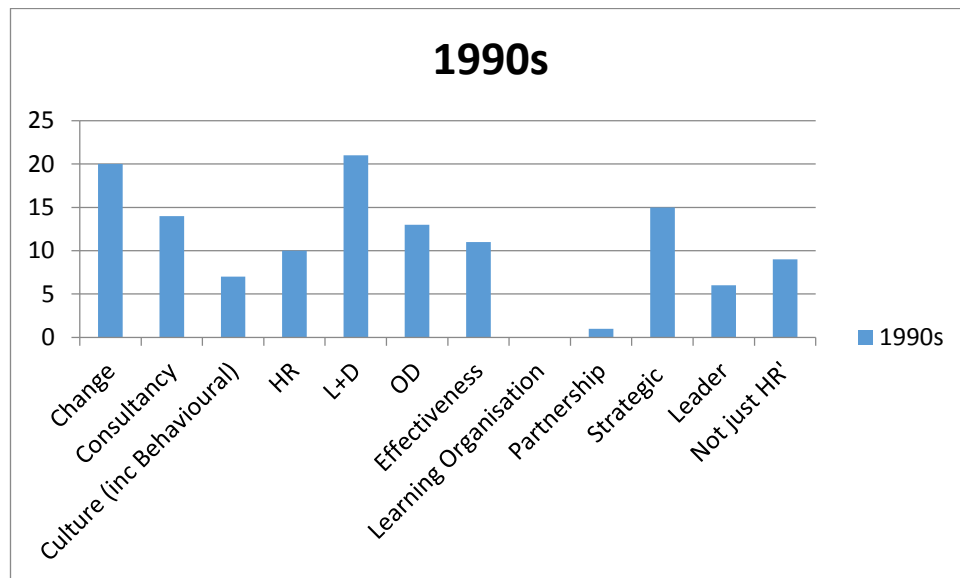
Terms Coded	Codes
Change/ing, Change Management, Strategic Change, Vision, Change Programme, New Direction, Future, Transform/ational/ing, Expansion, Adapts, Growth, Growing, Develop/ments (in relation to the service / business), New Organisational Arrangements, Inception, Regeneration, Merge/r, Innovative plans, Innovation, Modernising	Change Management
Project/s, Intervention/s, Programme/s, Consultant/cy, Action Research, Initiatives, Clients	Consultancy Orientation
Culture/al/s, Behavioural, Values, Inspire, Motivate, Modernised, Responsive, Hearts and Minds, Psychology, OB, Team Building, 'Way of Working', 'Working Together', Personal Change	Cultural Issues
HR, Operational HR, Generalist HR, Workforce / Manpower Planning, Recruitment, Retention, People Management / Issues, Employment Law, Reward, Job Evaluation, Personnel, Pay and Grading, Resourcing, Equal Opportunity (responsibility for)	HR
Learning, Coaching, Education, Training, Succession Planning, IIP, Career Path/ing / Planning / Management, Talent, Competence/ies, Develop/ed / development / growing (when linked to learning / skills / leadership / managers/ staff / people / workforce, personal), HRD, 360 Degree Feedback	Learning and Development
OD, Organisation Development, Organisational Development, Organisation/al Analysis / Design / Structure(s), Job Design, Facilitation	OD
Effective/ness, (Organisational) Capability, Business Objectives, Performance/ing, Improvement (s), Human Capital, Productivity, Infrastructure, Value (for money, added, best), (Measurable) Outcomes, Equipping us to be a world class ..., Excellence, Commercial Contribution, Ensure Success, Service Delivery, Consistent with ... service ... Objectives, Business Intent, Fully Exploit, Business Benefits, Efficiency, Successful, Best Value, Better Services. Modernise, Exceed Targets, First Class, Results, Service Level Agreements, Highest Standards	Effectiveness

Terms Coded	Codes
Culture of ... continuous learning, Change Capability, People / leadership capability/ies, Organisational Capability, Capacity, Shaping an organisation ...fit for future, Continual/ly/ed Improve/ment, Growth, Organisational Success, (Continuous) Improvement, Drive for Improvement, Resilient, Agile, Learning Culture / Organisation	Organisational Learning Orientation
Partner/ship, Engaging / Engage/ment, Stakeholder(s), Customer, People Centric Perspective, Well Being, Working to develop the best employer ..., Involved/ment, Joint Working, All Staff Work as One Team, Collaborative, Employee Relations, Inclusive, Staff Surveys, Multi Agency / Service, 'Each and every employee', Intra (Organisation), Working Relationships, Liaise. 'Embraced by every individual', 'Working closely with', 'Work productively with', Consultative/on/ing, 'Draw In', 'Working Together', Integration	Partnership Issues
Strategic, Strategy/ies, Overall Direction, Big Picture, Policy, Executive, Board / Highest ... Level(s)	Strategic Approach
Leader/s/hip, Manage/r/ment, Head Up, Shaping	Leadership
Beyond HR, Outside ... HR, Corporate / Board, Across ... boundaries / force businesses / organisation / the council, Governance, Wider influence of HR, Overall Approach, Executive, Business Needs / Function / Focus / Oriented / Processes / Goals / Objectives / Development / Plans, Commercial Experience / Awareness / Acumen, Commercially Oriented / Throughout (the organisation), Entrepreneurial, Building Business, Wider Organisation, Key role (linked to business success), Customer Need, Top Team, Client Expectations, Steer the Organisation, Aligning Business, Service Delivery, Organisational Problems 'Impacts Top Management', Holistic	Organisation Wide (Not just HR)

## OD Job Roles

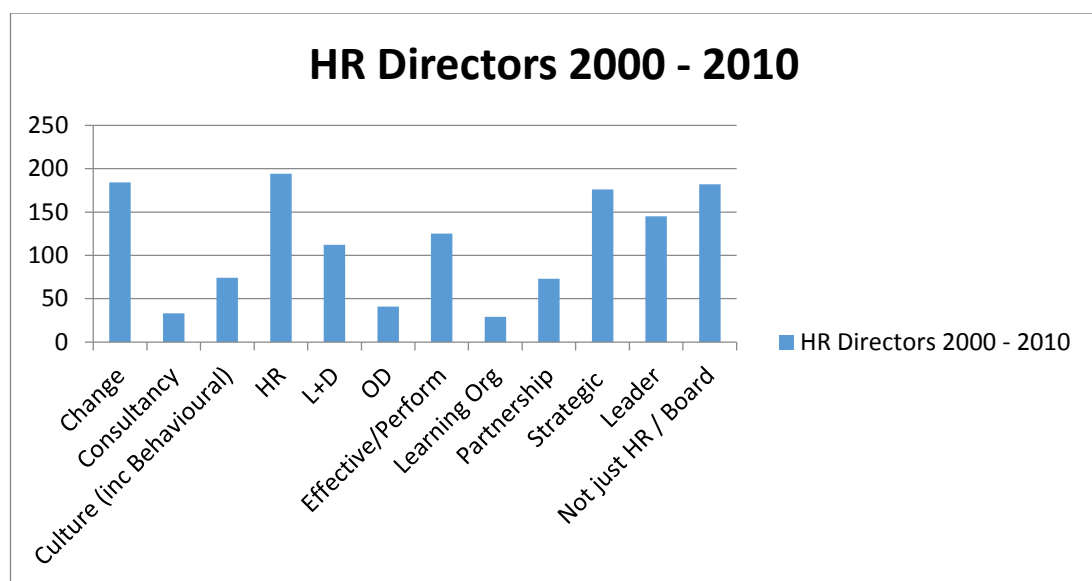
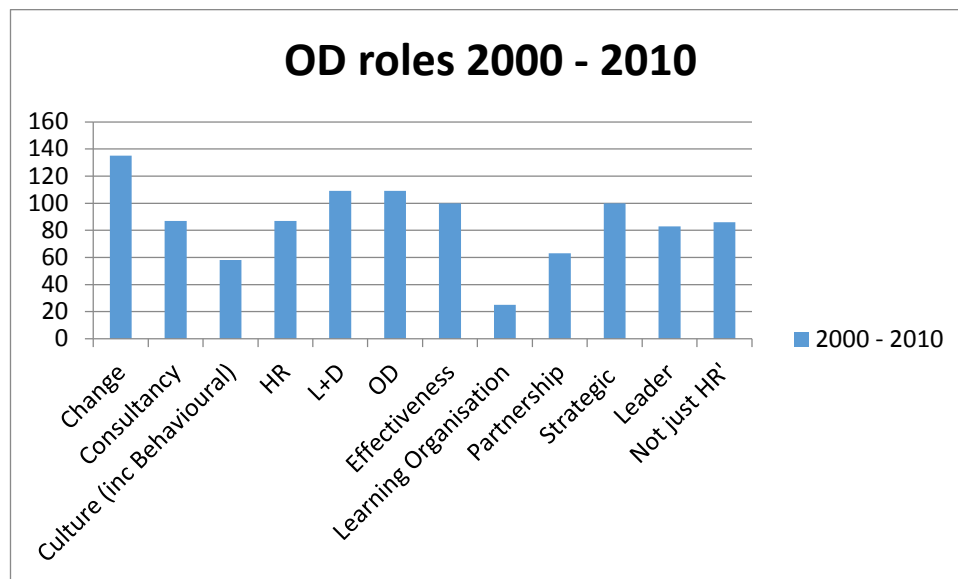


## OD Job Roles

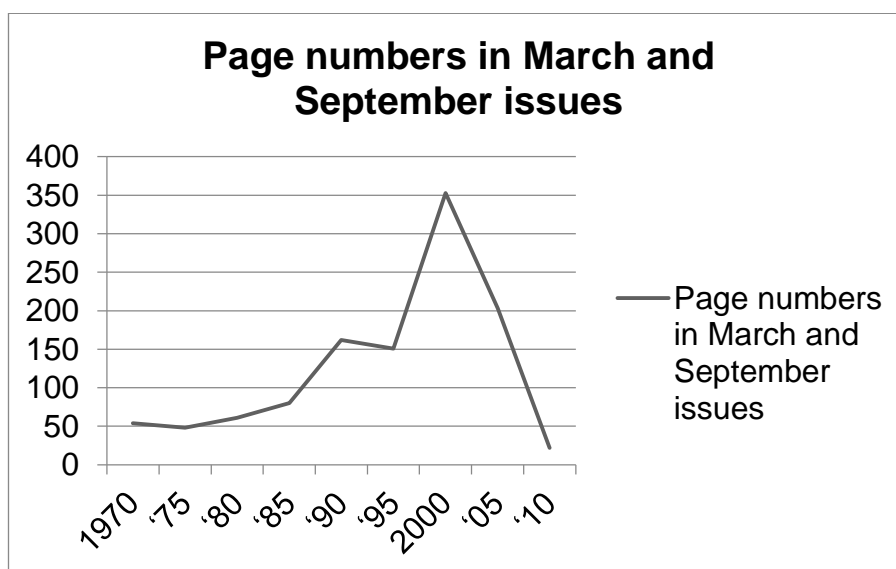
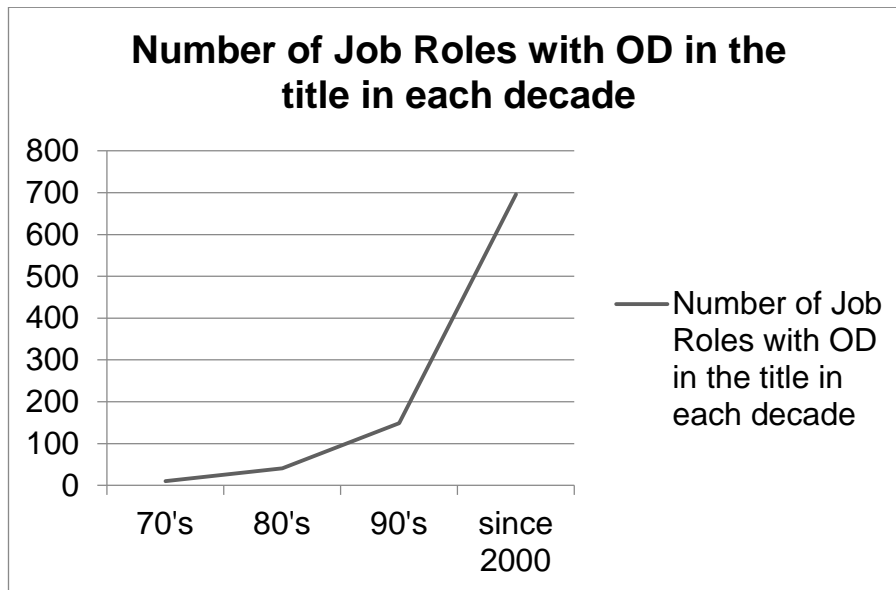




## 2000 – 2010 OD role profiles compared with HR Directors (in the same period)



## Number of Job Roles with OD in the title – over 4 decades



## Appendix 4.9 Format 2 Semi-structured Research Interviews

### Introduction

- Explain the background to the research and stages completed so far. There are no 'right or wrong' answers – it is the interviewees' views and perceptions that are of importance to the research project.
- I will not be as interactive as I might be in a normal conversation. It is important that I do not give leading comments. However, I will give clarification, but please feedback if you think I have 'led' you at any point. After the interview – I will then be happy to give you information on my findings to date.
- I will make notes during the interview, my 'write up' will be sent back to you for correction, until you are fully comfortable that my notes reflect your views.
- In the pilot interviews, interviewees often mentioned a difference between the way they felt things 'SHOULD' work and the disparity between that and their experience of how things 'DO ACTUALLY' work in practice. Therefore you will be asked for both points of view
- Refer to the coding dictionary in Appendix 1 and explain how it was developed

**Check that signed off ethical approval form is in place.**

### Section 1 Your experience of OD and HRM

#### 1. Critical Incidents:

a) When was the first time you recall hearing of 'OD' (or organisation/al development)

What are the most significant changes in your understanding of OD:

#### 2. Who is the most effective 'OD' person you have come across? Who is the most effective HR person you have come across?

3. How important do you think the following are in the contemporary OD profession (across sectors – not just in your organisation)? Please differentiate between 'SHOULD' and 'DO ACTUALLY' work (by writing in S or A).

**(Please see the sample below for how to record your view)**

	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>	
	<b>Very important</b>	<b>Important</b>	<b>Neutral</b>	<b>Unimportant</b>	<b>Very unimportant</b>	<b>Don't know</b>
Change Management						
Consultancy Orientation						
Culture Issues						
Behavioural Science Issues						
HR						
HRD (Human Resources Development)						
OD						
Effectiveness / Performance (individual, team or organisational)						
Organisational Learning Orientation						
Partnership Issues						
Strategic Approach						
Leadership						
Organisation Wide (Not just HR)						

**SAMPLE:**

	<b>Very important</b>	<b>Important</b>	<b>Neutral</b>	<b>Unimportant</b>	<b>Very unimportant</b>	<b>Don't know</b>
Change Management	<b>S</b>	<b>A</b>				
Consultancy Orientation		<b>S</b>	<b>A</b>			

4. Repeating the question from HRM - how important do you think the following are in the contemporary HRM profession (across sectors – not just in your organisation)? Please differentiate between ‘SHOULD’ and ‘DO ACTUALLY’ work (by adding S or A).

**(Please see the sample below for how to record your view)**

	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>	
	<b>Very important</b>	<b>Important</b>	<b>Neutral</b>	<b>Unimportant</b>	<b>Very unimportant</b>	<b>Don't know</b>
Change Management						
Consultancy Orientation						
Culture Issues						
Behavioural Science Issues						
HR						
HRD (Human Resources Development)						
OD						
Effectiveness / Performance (individual, team or organisational)						
Organisational Learning Orientation						
Partnership Issues						
Strategic Approach						
Leadership						
Organisation Wide (Not just HR)						

**SAMPLE:**

	<b>Very important</b>	<b>Important</b>	<b>Neutral</b>	<b>Unimportant</b>	<b>Very unimportant</b>	<b>Don't know</b>
Change Management	<b>S</b>		<b>A</b>			
Consultancy Orientation		<b>S</b>			<b>A</b>	

5. Do you think these factors (below) have become more or less important for the OD profession in THE LAST 40 YEARS? Do you think these factors have become more or less important for the HRM profession in the same period?

	1	2	3	4	5	
In the last 40 years	It has become much more important	It has become more important	Neutral	It has become less important	It has become much less important	Don't know
Change Management						
Consultancy Orientation						
Culture Issues						
Behavioural Science Issues						
HR						
HRD						
OD						
Effectiveness / Performance (individual, team or organisational)						
Organisational Learning Orientation						
Partnership Issues						
Strategic Approach						
Leadership						
Organisation Wide (Not just HR)						

6. How important do you think OD skills and practice are in providing a contribution to making HRM a more strategic, 'value added' and /or a 'value creation' organisational contributor?

	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>	
<b>OD Skills / practices in:</b>	<b>Very important</b>	<b>Important</b>	<b>Neutral</b>	<b>Unimportant</b>	<b>Very unimportant</b>	<b>Don't know</b>
Making HRM a more strategic organisational contributor?						
Contributing to HRM becoming a 'value added' contributor.						
Contributing to HRM becoming a 'value creation' contributor.						

### **Structured themes / semi-structured questions**

For the rest of the interview, what follows is a guide to the areas to be covered – depending on the response you give; the follow up questions may vary. This research is exploratory research – the purpose of these questions is to explore your views and experience.

### **Section 2 Features of OD?**

1. Who are the key players in OD?
2. Who 'owns' OD?
3. Do you consider OD to be a subset of HRM or the other way round?
4. Do you consider those to be successful at OD to be as a result of their technical OD / HRM skills – or is it more of an 'x-factor' / emotional intelligence / individual characteristic of the individual

### **Section 3 Changes in OD over the decades**

1. What are your views on the 'Evolution' of OD, HRM and HRD – are they separate populations, are they now (or have they in the past) converged as functions, are they now (or have they in the past) diverged?
2. Do you consider OD to be a management fad or fashion?
3. How would you define contemporary OD?
4. Are there any underlying themes in OD and HRM which remain unchanged over the decades?

### **Section 4 Job advertisements**

1. a) What influence do you consider advertisements to play in the formation and change of identity for a professional grouping? Are they drivers of a trend in professional identity or do they follow fashion?



2. In your experience are advertisements 'true' reflections of the jobs advertised (and if not, do they still have a bearing on our perception of trends in job roles?)

Finally - anything else you would like to add?

NOTES FROM YOUR INTERVIEW WILL BE WRITTEN UP AND I WILL SEND THEM BACK TO YOU FOR CHECKING / CORRECTION / ADDITIONS / OMMISIONS.

**THANK YOU VERY MUCH FOR YOUR TIME AND CONTRIBUTION TO THIS PhD THESIS PROJECT.**

## APPENDICES FOR THE INTERVIEW

## Coding Dictionary

Terms Coded	Codes
Change/ing, Change Management, Strategic Change, Vision, Change Programme, New Direction, Future, Transform/ational/ing, Expansion, Adapts, Growth, Growing, Develop/ments (in relation to the service / business), New Organisational Arrangements, Inception, Regeneration, Merge/r, Innovative plans, Innovation, Modernising	Change Management
Project/s, Intervention/s, Programme/s, Consultant/cy, Action Research, Initiatives, Clients	Consultancy Orientation
Culture/al/s, Behavioural, Values, Inspire, Motivate, Modernised, Responsive, Hearts and Minds, Psychology, OB, Team Building, 'Way of Working', 'Working Together', Personal Change	Cultural Issues
HR, Operational HR, Generalist HR, Workforce / Manpower Planning, Recruitment, Retention, People Management / Issues, Employment Law, Reward, Job Evaluation, Personnel, Pay and Grading, Resourcing, Equal Opportunity (responsibility for)	HR
Learning, Coaching, Education, Training, Succession Planning, IIP, Career Path/ing / Planning / Management, Talent, Competence/ies, Develop/ed / development / growing (when linked to learning / skills / leadership / managers/ staff / people / workforce, personal), HRD, 360 Degree Feedback	Learning and Development
OD, Organisation Development, Organisational Development, Organisation/al Analysis / Design / Structure(s), Job Design, Facilitation	OD
Effective/ness, (Organisational) Capability, Business Objectives, Performance/ing, Improvement (s), Human Capital, Productivity, Infrastructure, Value (for money, added, best), (Measurable) Outcomes, Equipping us to be a world class ..., Excellence, Commercial Contribution, Ensure Success, Service Delivery, Consistent with ... service ... Objectives, Business Intent, Fully Exploit, Business Benefits, Efficiency, Successful, Best Value, Better Services. Modernise, Exceed Targets, First Class, Results, Service Level Agreements, Highest Standards	Effectiveness

Terms Coded	Codes
Culture of ... continuous learning, Change Capability, People / leadership capability/ies, Organisational Capability, Capacity, Shaping an organisation ...fit for future, Continual/ly/ed Improve/ment, Growth, Organisational Success, (Continuous) Improvement, Drive for Improvement, Resilient, Agile, Learning Culture / Organisation	Organisational Learning Orientation
Partner/ship, Engaging / Engage/ment, Stakeholder(s), Customer, People Centric Perspective, Well Being, Working to develop the best employer ..., Involved/ment, Joint Working, All Staff Work as One Team, Collaborative, Employee Relations, Inclusive, Staff Surveys, Multi Agency / Service, 'Each and every employee', Intra (Organisation), Working Relationships, Liaise. 'Embraced by every individual', 'Working closely with', 'Work productively with', Consultative/on/ing, 'Draw In', 'Working Together', Integration	Partnership Issues
Strategic, Strategy/ies, Overall Direction, Big Picture, Policy, Executive, Board / Highest ... Level(s)	Strategic Approach
Leader/s/hip, Manage/r/ment, Head Up, Shaping	Leadership
Beyond HR, Outside ... HR, Corporate / Board, Across ... boundaries / force businesses / organisation / the council, Governance, Wider influence of HR, Overall Approach, Executive, Business Needs / Function / Focus / Oriented / Processes / Goals / Objectives / Development / Plans, Commercial Experience / Awareness / Acumen, Commercially Oriented / Throughout (the organisation), Entrepreneurial, Building Business, Wider Organisation, Key role (linked to business success), Customer Need, Top Team, Client Expectations, Steer the Organisation, Aligning Business, Service Delivery, Organisational Problems 'Impacts Top Management', Holistic	Organisation Wide (Not just HR)

## **Appendix 4.10 Format 3 Revised Short Semi-structured Research**

### **Interviews**

#### **Introduction**

- Explain the background to the research and stages completed so far.
- There are no 'right or wrong' answers – it is the interviewees' views and perceptions that are of importance to the research project.
- I will not be as interactive as I might be in a normal conversation. It is important that I do not give leading comments. However, I will give clarification, but please feedback if you think I have 'led' you at any point. After the interview – I will then be happy to give you information on my findings to date.
- I will make notes during the interview, my 'write up' will be sent back to you for correction, until you are fully comfortable that my notes reflect your views.

**Check that signed off ethical approval form is in place.**

#### **Section 1 Your experience of OD and HRM**

1. Critical Incidents:
  - a) When was the first time you recall hearing of 'OD' (or organisation/al development)?

What are the most significant changes in your understanding of OD?
2. Who is the most effective 'OD' person you have come across? Who is the most effective HR person you have come across?

#### **Section 2 Features of OD?**

1. Who are the key players in OD?
2. Who 'owns' OD?
3. Do you consider OD to be a subset of HRM or the other way round?
4. Do you consider those to be successful at OD to be as a result of their technical OD / HRM skills – or is it more of an 'x-factor' / emotional intelligence / individual characteristic of the individual

### **Section 3    Changes in OD over the decades**

1. What are your views on the 'Evolution' of OD, HRM and HRD – are they separate populations, are they now (or have they in the past) converged as functions, are they now (or have they in the past) diverged?
2. Do you consider OD to be a management fad or fashion?
3. How would you define contemporary OD?
4. Are there any underlying themes in OD and HRM which remain unchanged over the decades?

NOTES FROM YOUR INTERVIEW WILL BE WRITTEN UP AND I WILL SEND THEM BACK TO YOU FOR CHECKING / CORRECTION / ADDITIONS / OMMISIONS.

**THANK YOU VERY MUCH FOR YOUR TIME AND CONTRIBUTION TO THIS PhD THESIS PROJECT.**

## **Appendix 4.11 Format 4 Revised Semi-structured Research interviews**

### **Introduction**

- Explain the background to the research and stages completed so far.
- There are no 'right or wrong' answers – it is the interviewees' views and perceptions that are of importance to the research project.
- I will not be as interactive as I might be in a normal conversation. It is important that I do not give leading comments. However, I will give clarification, but please feedback if you think I have 'led' you at any point. After the interview – I will then be happy to give you information on my findings to date.
- I will make notes during the interview, my 'write up' will be sent back to you for correction, until you are fully comfortable that my notes reflect your views.

**Check that signed off ethical approval form is in place.**

### **Section 1 Your experience of OD and HRM**

1. Critical Incidents:
  - a) When was the first time you recall hearing of 'OD' (or organisation/al development)?

What are the most significant changes in your understanding of OD?
2. Who is the most effective 'OD' person you have come across? Who is the most effective HR person you have come across?

### **Section 2 Features of OD?**

1. Who are the key players in OD?
2. Who 'owns' OD?
3. Do you consider OD to be a subset of HRM or the other way round?
4. Do you consider those to be successful at OD to be as a result of their technical OD / HRM skills – or is it more of an 'x-factor' / emotional intelligence / individual characteristic of the individual?

### **Section 3 Changes in OD over the decades**

1. What are your views on the 'Evolution' of OD, HRM and HRD – are they separate populations, are they now (or have they in the past) converged as functions, are they now (or have they in the past) diverged?
2. Do you consider OD to be a management fad or fashion?

3. How would you define contemporary OD?
4. Are there any underlying themes in OD and HRM which remain unchanged over the decades?

#### **Section 4    Changes in resourcing over the decades (for Karen Scott)**

1. From the time you became acquainted with recruitment and resourcing (when was that and in which roles?), what changes do you consider have happened? (Internal / external recruitment processes, use of job advertisements, online recruitment, use of agencies to recruit, headhunting, social networking etc).
2. What is your experience of who 'authors' recruitment advertisements / publicity / job role descriptions etc?
3. Are there people who influence fashion in a) terminology used in recruitment b) substantive change in the requirements of job roles?
4. Are there changes in the labour market generally which I should be making note of?
5. For this research project, what are the main implications of changes in resourcing process you think I need to take into account?

NOTES FROM YOUR INTERVIEW WILL BE WRITTEN UP AND I WILL SEND THEM BACK TO YOU FOR CHECKING / CORRECTION / ADDITIONS / OMMISIONS.

**THANK YOU VERY MUCH FOR YOUR TIME AND CONTRIBUTION TO THIS PhD THESIS PROJECT.**

### Appendix 4.12 Subject Experts Interview Context

Name	Date	Format of Interview Questions	Where?	Knowledge of person before / how introduced
Mrs Anne Stevenson	16/03/12	1	Telephone, interviewee at work in her office	Mrs Stevenson is an external examiner for the MSc in HRM at UWS; therefore the researcher had had semi-formal contact with her in this role over a couple of years prior to the interview.
Dr Chris Donegan	28/03/12	1	UWS Café	The researcher met Dr Donegan at a book launch for Organisational Development: A New Agenda for Organisational Effectiveness (Edited by Helen M. Francis, Linda Holbeche, Martin Reddington). The book launch was held at Standard Life HQ in Edinburgh, the researcher therefore had met the interviewee only once before the interview.
Professor Marie McHugh	05/06/12	1	Prêt a Manger Café, Euston Road, London	The researcher met Professor McHugh in her role as Chair of the British Academy of Management (BAM) when the researcher was selected as Part Time PhD representative on council. The researcher had therefore had the opportunity to meet Professor McHugh a number of times in this context prior to the interview.
Professor Richard Thorpe	13/06/12	1	Starbucks Café, Euston Road, London	The researcher met Professor Thorpe in his role Chair of The Society of Advanced Management on BAM Council. The researcher had therefore had the opportunity to meet him a number of times in this context prior to the interview.
Dr Linda Holbeche	03/08/12	2	Telephone, Dr Holbeche working	Having been aware of Dr Holbeche's reputation as being an influential thinker on OD for some time the researcher knew she was someone who she would very much like to interview for this project. The researcher therefore purposely attended the book launch for Organisational



			from home	Development: A New Agenda for Organisational Effectiveness with a view to meeting Dr Holbeche and asking if she would mind being interviewed for this research. The researcher therefore met her once before the telephone interview.
Professor Helen Francis	13/08/12	2	Telephone, Professor Francis at work in her office	The researcher purposely attended the book launch to meet Professor Francis; the researcher had been in e-mail contact with her twice prior to that, however she had only met her once at the book launch before the telephone interview.
Mr Geoff Matthews	11/10/12	2	Telephone, Mr Matthews at work in his office in Geneva, Switzerland	When the researcher interviewed Dr Holbeche, she referred to Mr Matthews (with whom she had co-authored a book on Employee Engagement) as an outstanding Senior Practitioner in OD. The researcher asked her if she would mind asking him, if he minded being interviewed. Mr Matthews agreed to be interviewed and the researcher interviewed him by telephone.
Ms Joanne Ramsay	16/10/12	2	Millennium Hotel Café, Glasgow City Centre	The researcher met Ms Ramsay at the CIPD meeting and book launch at Standard Life. Prior to this the researcher did not know Ms Ramsay.

Mrs Karen Scott	22/02/13	3 + 4	Hudson Global Resourcing Board Room, Glasgow City Centre	Mrs Scott was the researcher's line manager since she joined Polaroid in 1996. Mrs Scott and the researcher became close friends and have continued to be. The researcher therefore specifically chose to interview Mrs Scott at her on the premises of Hudson Global Resourcing. It was important to the researcher in data collection methodology that consideration was given to the interview, to be conducted as formally as any other subject expert interview.
Ms Shirlie Leighton	22/02/13	4	“	The researcher met Ms Leighton the first time when she joined Mrs Scott for a section of her interview.
Ms Liz Lambert	28/02/13	3	Telephone, Ms Lambert at home on Maternity Leave	The researcher carried out a Google search to find a Senior HR person in a large well known social enterprise organisation. She found reference to the Director of OD at Oxfam. The researcher 'emailed' cold via the Oxfam website and they passed her onto the HR Director who recommended she interview the organisation's Head of OD, but the researcher needed to do this quickly because she was due to start maternity leave. The researcher therefore had the opportunity to interview Ms Marshall just in time – one week before her 'due date'.
Professor John Burgoyne	06/03/13	3	Telephone, Professor Burgoyne at work in office	The researcher approached Professor Burgoyne after a presentation he gave at an ESRC seminar series event, to ask him if he grant an interview. After the interview, Professor Burgoyne sent the researcher other information that might be of interest to this research.
Professor David Collings	06/03/13	3	Telephone, Professor Collings at work in office	The researcher e-mailed Professor Collings 'cold' and asked if he would grant her an interview.

Professor James Hayton	16/03/13	3	Telephone Professor Hayton at work in office	Professor Hayton was recommended to the researcher as an interviewee when she was in a meeting with the Dean of a Business School. She subsequently e-mailed Professor Hayton.
Professor Bill Cooke	24/03/13	3	BAM Offices in Euston Road, London	The researcher had heard from her PhD Director of Studies that Professor Cooke was to do a presentation on the origins of OD and The Tavistock Institute at NTU. This was subsequently cancelled, but shortly after that, Professor Cooke was appointed to BAM Council, so the researcher knew she would meet him through that forum. When the researcher e-mailed him he granted time for an interview at the end of a BAM Council meeting.
Ms Claire Bishop	17/05/13	3	Telephone, Ms Bishop at work in CIPD Offices in Wimbledon	Ms Bishop was introduced to the researcher by the Head of CIPD in Scotland. He is a regular attendee at the BAM Conference particularly in the OTCD SIG (of which the researcher was Co-Chair) – and he was a member of the SIG committee. The researcher had not met Ms Bishop prior to the telephone interview.
Professor Paul Martin	01/08/13	3	In Professor Martin's office at UWS	The researcher had met Professor Martin in passing prior to e-mailing her request for interview to him. The researcher had identified that she wanted someone who had held a senior role in the NHS within the interview co-hort. She had been going to look further afield (having been employed in the NHS in London at the start of her career, she had identified some potential contacts). However the researcher then decided that it was an option to look 'nearer to home' for some interviews. She was going to ask Professor Martin to refer her to a contact, but then realised that with his background in three different forms of the public sector, he was potentially a far more ideal candidate than many.
Mr Steve Phoenix	09/08/13	3	By telephone whilst Mr	Mr Phoenix was the researcher's line manager from 1984 to 1989 when she worked in an HR role in London. In the last 2 decades the researcher had met him twice socially, but other than that

			Phoenix was home in the UK from Qatar on holiday	had very occasional e-mail contact. He granted an interview time when he was back in the UK for his holidays.
Dr Mannie Sher	13/08/13	3	By telephone, Dr Sher at work in office	The researcher had previously e-mailed the CEO of the Tavistock Institute ('cold') and she had agreed to be interviewed, but suggested she might have to refer to one of her colleagues who had been with the organisation longer. She was then not available for a period. One of the researcher's colleagues mentioned that he was going to visit The Tavistock, so the researcher said she would like to interview Dr Sher (whose name she had remembered from looking into The Institute a few years ago). From her memory, the researcher remembered that he had been in a senior leadership role and that he might be one of the longer serving members of staff the CEO would have referred to. The researcher, therefore decide to seize the opportunity and ask him if he would grant an interview (via her colleague).
Ms Amanda McMillan	15/08/13	3	At Glasgow Airport in Ms McMillan's office	The researcher sent Ms McMillan a letter 'cold', to request an interview. She had been looking to find other business leaders and to get ideas looked at who was on local Chamber of Commerce Boards. The Operations Manager of Glasgow Airports was listed and when the researcher looked at the organisations site she found Ms McMillan's details as the MD. There were no contact details given on the website (given the nature of the organisation), so the researcher decided to send a letter and was fortunate to receive a positive response.
Mr Tarik Chawdry		3	By telephone	Having failed to get another HR Director from this sector after the researcher's first Google search (see above – in 'ones that got away') she met a fellow PhD student who also worked in the HR function at Birmingham City Council. He recommended Mr Chawdry as an interviewee. The fellow PhD student spoke to Mr Chawdry and gave the researcher an e-mail introduction. Mr Chawdry replied to the email and an appointment was set up for a telephone interview.
Ms Yvonne		3	In Ms	The researcher sent an e-mail 'cold', to one of the partners of the organisation to request an

Anderson			Anderson's office	interview. She had been looking to find business leaders from other sectors and to get ideas looked at who was on local Chamber of Commerce Boards. The partner she had written to did not reply to the first e-mail, it occurred to the researcher that her topic might be too specialised and put him off, the researcher therefore wrote and asked if she might meet his HR Director instead. He responded to this request within hours and an appointment was set up with Ms Anderson.
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## **Appendix 4.13 Informed Consent Form**

Thank you for agreeing to be interviewed for my PhD thesis research project:

‘Conceptualizing Organization Development: practitioner and academic perspectives – a UK study’

The interview will be conducted under the Ethical Approval granted to me by the College of Business, Law and Social Sciences ethics process of Nottingham Trent University and will be informed by the professional code of practice of The Chartered Institute of Personnel and Development. In this regard I am now seeking your formal ‘informed consent’ to be interviewed.

### **Some information about your rights in the informed consent process:**

I will take verbatim notes during the interview. Afterwards I will write the notes up and will send these back to you for checking / correction / addition – and this review process will continue until there is a record that you are satisfied correctly reflects your views. The information collected from you in the interview process will be stored on only computers which can be accessed by me using password protection. Information sent and received in e-mails will be subject to the IT system security of The University of the West of Scotland.

### **There are four different levels of consent, for you to choose from:**

1. I do not want to be identified in any part of the thesis.
2. My name can be noted in a list of interviewees within the thesis, but I do not wish any specific quotes to be identifiable as being mine.
3. My name can be noted and can be used against specific quotes within the text / appendices of the thesis, but not in any subsequent publication without my permission.
4. My name can be noted and can be used against specific quotes within the text / appendices, and can be used in subsequent publications.

Given the nature of this work and the purpose of selecting you as an interviewee (i.e. specifically because of your expertise), I would prefer that you opt for level 3 of confidentiality (as described below), but if not, then level 2.

You can withdraw or change your consent level by contacting me (please see e-mail and correspondence address at the end) any time up to within a calendar year of the date of giving your consent. You do not need to give reasons for exercising the right to withdraw or change your consent status level and there will be no repercussions as a result.

**Please complete and return this page**

**Please complete below:**

	<b>Please enter your response information below</b>
The level of consent I give is:  (please enter a number from 1-4 inclusive)	
My name in block capitals	
My signature  (please use an electronic signature if you have one, if not your cover e-mail will be kept and stapled to this form as a record of your consent)	
Date consent given	

**Thank you in advance for your consent and for participating in my PhD research project.**

Anne Clare Gillon

[anneclare.gillon@uws.ac.uk](mailto:anneclare.gillon@uws.ac.uk)

**Address & telephone number for correspondence**

The Business School

The University of the West of Scotland

Paisley Campus

Paisley

PA3 4BW

+44 (141) 848 3465

### Appendix 4.14 Informed Consent Interviewee Response Table

Level of consent	Names of subject experts	Description
1	None of the interview subjects	I do not want to be identified in any part of the thesis.
2	<ul style="list-style-type: none"> <li>• Marie McHugh</li> <li>• Bill Cooke</li> <li>• Claire Bishop</li> <li>• Amanda McMillan</li> </ul>	My name can be noted in a list of interviewees within the thesis, but I do not wish any specific quotes to be identifiable as being mine.
3	<ul style="list-style-type: none"> <li>• Anne Stevenson</li> <li>• Chris Donegan</li> <li>• Richard Thorpe</li> <li>• Linda Holbeche</li> <li>• Geoff Matthews</li> <li>• Joanne Ramsay</li> <li>• Claire Bishop</li> <li>• Paul Martin</li> <li>• Mannie Sher</li> <li>• Tarik Chawdry</li> </ul>	My name can be noted and can be used against specific quotes within the text / appendices of the thesis, but not in any subsequent publication without my permission.
4	<ul style="list-style-type: none"> <li>• Linda Holbeche</li> <li>• Karen Scott</li> <li>• Shirlie Leighton</li> <li>• John Burgoyne</li> <li>• James Hayton</li> <li>• Steve Phoenix</li> </ul>	My name can be noted and can be used against specific quotes within the text / appendices, and can be used in subsequent publications.
Other	<ul style="list-style-type: none"> <li>• Helen Francis</li> <li>• Liz Lambert</li> <li>• Yvonne Anderson</li>   <li>• David Collings</li> </ul>	<p>Did not complete form – will all be treated as level 2</p> <p>The primary concern was that his comments are treated as being from him as an individual, not in his capacity as an editor of an academic journal.</p>



## Appendix 5.1 Human Relations Journal Search

5 forms of the title of OD searched: *Organisation Development, Organization Development, Organisational Development, Organizational Development* and OD.

**1976:** Guidelines for Overcoming Empirically Identified Evaluation Problems of Organizational Development Change Agents

Achilles A. Armenakis, Hubert S. Feild and William H. Holley

**1977:** Differential Administrative Capacity and Organizational Development: A Kibbutz Case Study

David Billis

**1978:** Operational Research and Organization Development

Colin Eden

**1982:** Organization Development: A Closer Scrutiny

Warner Woodworth, Gordon Meyer, and Norman Smallwood

**1983:** The Psychodynamics of Organization Development Consultants

David Tranfield

**1983:** Toward a Theory of Organization Development Interventions in Unionized Work Settings

Arie Shirom

**1992:** Applications of Bayesian Methods to OD Evaluation and Decision Making

Daniel J. Svyantek, Matthew S. O'Connell, and Terri L. Baumgardner

**2012:** Review Article: The past, present and future of organization development: Taking the long view

Bernard Burnes and Bill Cooke

## Appendix 5.2 Reference source list for table 5.13

NB: The references are in the format produced by Copac. Since there are instances where, for example the location was not supplied, it was decided to retain the Copac format rather than transfer these sources into the same format used for references in the thesis reference list.

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