

John White - Reflection Paper

Organizational Change Models and Applications - OMC 678K.09F - Bob Rue

“Everybody wants to be somebody; nobody wants to grow.”  
**Johann Wolfgang von Goethe**

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I have worked for several organizations during my lifetime, but none of them went through any formal reorganization during my period of employment. One of them, a mental health agency, was in very serious need of such an activity but due to the dogmatic leadership style of the Executive Director and the subservience of the individuals directing the various departments this would not happen until years after I left the organization. Because it is still troubling to think about those years and because I have dealt with that organization in a previous paper last year, I have chosen a more positive experience – although some of my narrative may belie that description.

In an organization, a Charitable Trust, for which I worked while living in Scotland, I did experience the unplanned reorganization of the Publications Department as a member of that work group. The Scottish organization offered on-location educational programs, published books, offered an island retreat off the western north coast, and offered a bi-monthly newsletter to former guests. The pressure to reorganize came about due to a new initiative which I spearheaded: the creation of a 32 page magazine containing “news” articles about the organization’s activities and the activities of similarly focused social benefit organizations and activities around the world.

The situation prior to the magazine’s creation was this:

- ❖ A bi-monthly eight page Trust-focused newsletter was mailed to hundreds of people.
- ❖ There existed a low volume Publications Dept., occasionally publishing books, postcards, the newsletter, and other materials for visitors.
- ❖ A visiting prominent *Futurist*, a speaker at the Trust’s annual conference, spurred excitement about publishing a “news magazine” focused on world-wide social innovations, including the Trust’s work.
- ❖ All published material was to be approved by the Editorial Board (hereafter EB).
- ❖ I had created an internal “newspaper” (the Trust was a community of over 350 individuals and families all living within a few kilometers of the center).
- ❖ I was asked by an EB member to create a new magazine to replace the newsletter.

- ❖ I was appointed the project coordinator and magazine editor.
- ❖ I was given three months to produce the first issue.
- ❖ I had no staff.

The idea of creating a new magazine with a “news” bent quickly caught many people’s imaginations, although not all were in agreement with this concept. Still, within three weeks I had identified my preferred staff, including a writer for the former newsletter, and another individual, an experienced journalist who had just joined the Trust community. Other Trust members or guests would be contributing writers, including a well known author of personal development books who visited from time-to-time. The chosen staff and I set to work designing the appearance of the magazine, defining contents (editorial, opinion column, etc.), and choosing a name. This led to conflict.

- ❖ The Publications Department (PD) designers objected to the staff’s design concept and wanted final approval of the layout format.
- ❖ There was contention among staff and with the Editorial Board about the proposed percentage balance between news of Trust activities and news from elsewhere.
- ❖ The name we wanted to use raised objections from some on the EB.
- ❖ The printers (PD members) insisted they should be involved in design discussions.
- ❖ Some staff and EB members said we should charge for out-of-country mailing.
- ❖ I argued that it should be free, initially, to gain the widest distribution.

For two months there was daily tension, conflicts, and arguments that sometimes resulted in people not speaking with each other for a day or longer or until again necessary. I was supposed to negotiate this development, but I was often the one involved in the conflicted situation. I had absolutely no training in resolving disagreements when people, including myself, held tight to opinions - beyond trying to wear down the other’s resolve. It was an uncomfortable time and it left lingering resentment with a few. Fortunately, the daily staff got along quite well. It was others on the PD staff and the EB who continued to grouse. Still, we met the deadline and every bi-monthly one thereafter. I worked as Managing Editor for ten months, four editions, before leaving Scotland.

In reflecting on this experience these thirty years later, I can see some of what I did not recognize at the time. I can also hypothesize on some of the methods I might have used to resolve the conflicts in an attempt to create a more harmonious transition from a familiar eight page newsletter to a new,

transformative publication: a thirty-two page glossy cover magazine. (This was a transformative publication because it had a completely different look; the contents were 60-70 percent about events and activities outside of the Trust; the readership grew by over 40 percent after two issues; people were willing to pay a modest amount to receive it.)

Some mistakes I recognize making:

- ❖ I was too invested in making the idea I carried into a visible expression.
- ❖ I didn't meet with the entire EB to discuss my vision of the magazine, but worked with only one EB representative
- ❖ I invited no EB member or PD member to the magazine's weekly staff meeting during the development phase. They got involved after-the-fact by raising objections. (Those pesky stakeholders *always* insist on their involvement!)
- ❖ Compromises with one group (EB or PD or the Trust's Board) didn't apply to others.
- ❖ I continued to assume that public success (which we got) would quell objections.
- ❖ My focus was to get the magazine established (Analytic and Driver focused), but I lacked the Expressive style and related negotiation skills.

Looking at this from the Beckhard and Harris model, the *Dissatisfaction* (with the newsletter format) piece of the formula was widely agreed on among Trust leadership, but the *Desired Future State* was a different idea depending on with whom you spoke. The resources component of the *Practicality of Implementation* element was present in one manner, in the PD's existence and the creation of a magazine staff, but the muddled vision was a major complication. Thus, there was *Resistance* from several directions.

The project and the relationships with all involved would have been better served if I had engaged in:

- ❖ An initial period of reflection and exploration;
- ❖ A gathering of collective insights prior to the implementation stage;
- ❖ Requesting feedback and reflected on same as part of inter-stakeholder communications as a component of action planning.

My approach failed to explain the benefit I saw this new development bringing the entire Trust community, so rather than reducing stakeholder resistance and task complexity I probably increased

it. If I look at this situation through the Ackoff model for change, I created a “wicked mess”. Going back to Lewin’s model of individual change, I failed to recognize my old behaviours as non-serving in this situation. At the same time, I was not aware of the need to see this development through the lens of needing to help other key stakeholder groups and individuals change their perspective on how the Trust might communicate with the larger world.

The creation of this magazine with a “news” focus and lens on the outside world, and also looking more closely at the internal world of the Trust, was a transformative event. It certainly made the Trust more transparent. In retrospect, I now believe that only a few on the EB had this vision in mind and even they didn’t fully consider the implications, but they had convinced the entire EB that a new communication vehicle was a good idea. Thus, the initiative began under an unclear sky:

- ❖ A few members of the EB saw the benefit of transforming the Trust’s expression to the larger world;
- ❖ the wake up call wasn’t widely agreed on (**this is huge**);
- ❖ and this led to the clash of the visionary leadership seeking the change and the leadership elements who were not on-board reacting to the vision they saw emerging.
- ❖ The 10 Principles of Conscious Transformation were largely unrecognized as conscious aids for the process, but some did enter through the back door with time.

Decisions within the Trust’s Leadership Circle (LC - a level of everyday leadership distinct from the Board) were usually made by *consensus*, sometimes after weeks of collaborative effort spread throughout the community. However, outside of the LC the method of application of decisions was usually *directional* – based on the assumption that the previous collaboration brought the important stakeholders on board - unless there were major complaints. Reflecting on this established methodology, I believe the LC must have approved EB’s initiative for creating a new publication. How it was communicated to the EB may be an unanswered question, but not centrally important to resolving the situation in which I found myself and the project.

I’m assuming that bringing an initially healthier decision-making process to the EB level would be the place to introduce a change model exercise. I believe that Anderson’s model, introduced in class on October 25<sup>th</sup>, 2010, would have been very helpful. The EB could have worked through the

first few steps either with my involvement or without (recognizing that “without” might have effected my involvement in the project):

- ❖ The EB could have worked through the first five stages:
  - Clarifying the Trust’s vision and its commitment to the project.
  - Preparing for change by Planning, Visioning, determining PD’s Capacity.
  - Initially assessing the project’s human-capital requirement.
  - Establishing or envisioning an initial group to fulfill the project goals.
  - Discussing the probable impact on the Trust and its larger community.
- ❖ The proposed magazine staff and PD personnel would be brought in here:
  - To plan and organize - with EB oversight - for implementation.
  - To produce the first issue of the new publication.
  - To celebrate the accomplishment and continue internal integration; perhaps an Appreciative Inquiry process would be a valuable addition at this step.
  - To review and analyze, with EB input, the outcome and next steps.

Had I been aware of organizational dynamics thirty years ago, this initiative to open the Trust more to the outside world and invite more of the outside world in could have been handled more effectively. Other possible approaches that might have been used include: Future Search, Values Into Action, Balanced Scorecard, or even the Wisdom Council. There are many methods that might have worked, but I didn’t know of any of them in 1979. My personal method was to move ahead strongly once I was given the baton: I would argue until I won my point, or recognizing that I could not win outright I would back-off in stages and try to get as many of my objectives as I could. In this methodology, I was effective in the short-term. In the long-term it created repetitive antagonists. In this particular situation with the Trust community, it eventually led to the EB assigning a co-editor to the magazine, someone they knew I could not effectively work with, and resulted in my resigning and returning to the U.S..

In looking back over what I have written on these pages, I recognize that this entire process of initiating a new publication might have been flawed from the outset. At the time, I only recognized that there were problems with a smooth implementation arising within my immediate sphere of responsibility. I was unaware that these problems were nested in the entire community system, and that they might not have originated with my involvement. Had I realized that fact and how to work

with it, beginning with the magazine staff team I could have led us through the Forming, Storming, Norming, Performing, Transforming stages and invited the EB into our process after we completed a step, to then repeat each step with them. Approaching it this way would have, I believe, allowed us to address the contentious issues between us (the staff) and the EB within a sense of staff solidarity. I believe this would have prevented fragmentation of staff members and allowed us to be on a level plateau with the EB's established authority.

Even though we stumbled through this process, at the end of three months the staff:

- ❖ Was functioned as a harmonious unit;
- ❖ had produced a transitional publication that incorporated elements of the old and new;
- ❖ were well on our way to the full size (32 pages) new magazine;
- ❖ were able to retain the initial name we had chosen for the magazine;
- ❖ received ample kudos for what we had produced;
- ❖ were still getting grief from at least two *vocal* EB members.

The magazine was published for almost twenty-five years. I am proud of my accomplishment.

Over the years I wish I had had just a modicum of the insights that this course has given me. Many times have come and gone where it could have prevented considerable anguish and unproductive anger. I trust that I will have the opportunity to use this knowledge (realizing that I have only absorbed a small portion of what the texts offered and need continued study) to the benefit of myself and others at some future time. I am grateful for this resource, even at this late stage of my development.

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“In learning to know other things, and other minds, we become more intimately acquainted with ourselves, and are to ourselves better worth knowing.”

- Philip Gilbert Hamilton