In this issue you will find...

Articles examining:

• **Feature Article**
  Realizing Change Through Other Ways of Working

• Cross-Cultural Competence

• Coaches’ Coach Competence and Influence on Organizational Learning

• Appreciative Leadership and Opportunity-Centric Approaches to Organization Success

• Nonprofit Leaders and Organization Development Consultants

• Organizational Development Dilemmas in Nonprofit Organizations

• The Promise of Organizational Development in Nonprofit Human Services Organizations

• Management of Gender Roles
The Organization Development Journal is an international peer reviewed journal published quarterly and is abstracted in Psychological Abstracts, PsycINFO, PsycAlert, Psylit, Institute for Scientific Information and Anbar Management Publications databases. The Organization Development Journal enhances the capacity for practices of organizational development and change.

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This summer from July 24th-27th, ISOD will have the first international conference in Accra, Ghana. This conference is jointly hosted by Noble Kumawu’s Organisation Capacity Improvement Consultants and the University of Cape Coast. I had the pleasure of attending another conference in Ghana a few years ago about the same time of year and it was a wonderful experience. You will find that Ghana is one of the more progressive countries in Africa and the weather is lovely this time of year. The conference center is comfortable and modern and you will be impressed with the Ghanian leadership that Noble attracts to the conference. Please look through the journal for the announcement and call for papers. It will be an experience to write home about.

The summer issue begins with a featured article by Peter Woolliams and Fons Trompenaars on Realizing Change Through Other Ways of Working: Reconciling Competing Demands. Instead of focusing on the shift from the present state to the future state this new model analyzes the inter-relationships between the present and future. This way the consultant can bring the best of the present along with the new opportunities to the future instead of discarding the present.

Fons is well known for his work in culture and the next article, Cross-Cultural Competence: Performance-based Assessment and Training, is a fine example of work that follows in that tradition. This research based work looks at military personnel who have cross-cultural experience and exposes them to different cultural dilemmas. The reactions to these dilemmas helped the authors develop assessment and training tools and simulations.

The next article focuses on competence as well but this is athletes and their perception of their coaches. Frode Moen and Roger Andre Federicic in their article Coaches’ Coach Competence and the Influence on Organizational Learning, examine how the athletes view the competence of their coaches by a 15 item competence scale and their organization learning in this situation. Organization learning was assessed by
another assessment tools. The results of this study gives some insight on the dimensions that increase this learning.

Often we look at athletes as leaders in our society and Mary Lloyd Moore, Joseph Cangemi and Jay Ingram study the influence of appreciative leaders in Appreciative Leadership and Opportunity-Centric Approaches to Organization Success. Appreciative leaders empower others with their faith and belief in the untapped potential of their employees. It is through the emphasis of “what’s right” in the organization rather than “what’s wrong” that gives appreciative leaders the edge.

William Kahnweiler observes another type of leader in his manuscript, Nonprofit Leaders and Organization Development Consultants. In quite an interesting switch, this article suggests that even though there is a shortage of leaders in this sector and a potential brain-drain, these leaders should avoid using OD consultants at this time. This is one that all of us should read and take the author’s thoughts into consideration as we approach nonprofits.

Nonprofits are in difficult times and the work done by Shani Kuna and Ronit Nadiv in Organization Development Dilemmas in Nonprofit Organizations in Difficult Economic Times argues that OD needs to be aware of the dilemmas facing this sector. The authors warn practitioners not to get over-involved with the daily management and avoid over-identification with the client.

Nonprofits in human services organizations are the spotlight for Heather Fox’s The Promise of Organizational Development in Nonprofit Human Services Organizations. Here Fox argues that OD must build the organization’s capacity, improve internal systems management and develop staff. This article provides a different look at nonprofits for consultants to ponder what should be done in this sector.

Another leadership study looks at gender roles vs androgyny in the classroom. A. Danielle Way and Joan Marques inspect this phenomena in Management of Gender Roles: Marketing the Androgynous Leadership Style in the Classroom and the General Workplace. This work observes both MBA students and workforce members in the LA area to see the influence of roles on the environment. The results indicate that both men and women should adapt each other’s roles for more effectiveness in both situations.

Have a great summer and don’t forget to plan a special trip to Ghana. I am sure that you will find it not only educational but fun as well!
Organization Development Journal
Request for Submissions

The *Organization Development Journal* is a peer-reviewed journal that publishes articles related to Organization Development (O.D.) for a targeted audience comprised of experienced practitioners and academics. The journal has an international scope and includes submissions from countries all over the world.

If you have an interesting research, theory or practitioner-oriented manuscript we would like to hear more about it. Send submissions to the *Organization Development Journal* for consideration, using the submission guidelines below.

**Submission Guidelines**

Please read these guidelines carefully to ensure a smoother publication process.

**Submission Requirements**

**Email delivery:** Email two copies of your manuscript to joannecpreston@gmail.com each in a separate file; one for a blind review and one for editing.

**Contents of the two copies:**

**For the blind review copy:** Include the article; all figures; tables; and a list of references.

**For the edited copy:** To the blind review copy, add a title page, which contains your name, title and degrees, mailing address, telephone number, fax, email address, short biography of all authors (50-150 words, approximately), and a photo. Correct contact information is critical to editors who might need to clarify or confirm information.

*Please note:* The ODJ publishes all contact information for all authors unless an author directs us to do otherwise. Traditionally, readers use contact information to engage in dialogue with authors.

**Software used:** Use Microsoft Word® or a Word-compatible program.

**Text styles:** Body text should be 12 points, double spaced, Times New Roman. Mark headings by level from the style menu: i.e., Heading 1, Heading 2, and Heading 3.

**Style guide:** Follow the Publication Manual of the American Psychological Association [APA], 6th Edition.

**Manuscript length:** Limit the article to approximately 10 to 20 double-spaced pages. Include tables, figures—which might be single spaced—and references in the page count.

**Abstract:** Include an abstract limited to 75 words.

**Title page:** Include a title page in only the edited file, not the blind copy, as described above.
Figures: Create attractive, telling visuals. Unless critical to the clarity of your submission, limit figure size to half a printed page in portrait format. Eliminate color that will not duplicate well in black and white. Make the lines bold enough to be clear; use good alignment. Make lettering legible; check spelling. Add a caption. Number the figures. Include figures in the text. Cross reference each figure in your discussion. All Figures need to be submitted in JPEG format.

Tables: Follow APA guidelines for tables. Use captions, and number the tables. Include tables in the text. Cross reference each table in your discussion. Make sure the tables are in JPEG format for easy manipulation.

Biography: Limit your and co-authors’ biographies to approximately 50-75 words each. Each biography may include--as word limit permits--your name; affiliation; academic and/or corporate experience in O.D.; professional focus in O.D., such as professional or theoretical approach; honors; publications; and associations.

Photo: A photo that is a clear, in-focus, digital, mid-chest-and-head image, saved in a jpeg format with no fewer than 600 dpi. Paper photographs will not be accepted. Consider that copied photos lose clarity in the final publication.

Citations and references: Follow the APA style guide format. To reduce the number of editorial inquiries, follow these tips:
1. In the “Reference” section, list only the sources cited.
2. Check the spelling of authors’ names.
3. Include page numbers for all direct quotations.
4. Make clear whether discussion is your commentary or that of the authors you cite.
5. Reread your article carefully for misstatements, omissions, and other errors.

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Realizing Change Through Other Ways Of Working: Reconciling Competing Demands

Peter Woolliams, PhD
Anglia Ruskin University (UK)

Fons Trompenaars, PhD
Trompenaars Hampden-Turner Consulting

Peter Woolliams, PhD is emeritus professor of international management at Anglia Ruskin University (UK) and is an owner/partner in Trompenaars Hampden-Turner Consulting with Fons. He has collaborated and published jointly with Fons over some 18 years. He is co-author with Fons on some 20 publications including for ‘Business Across Cultures’ (available in several languages) and ‘Marketing Across cultures’ published by Capstone-Wiley 2004.

Fons Trompenaars, PhD is CEO of Trompenaars Hampden-Turner Consulting, an innovative centre of excellence on intercultural management. He is the world’s foremost authority on cross-cultural management and is author of many books and related articles including the best seller Riding the Waves of Culture, Understanding Cultural Diversity in Business, originally published by McGraw-Hill (1993) and now in its third edition and is translated into French, German, Dutch, Korean, Danish, Turkish, Chinese, Hungarian and Portuguese. He is the author and co-author of many other well regarded books including the Seven Cultures of Capitalism (Doubleday, 1993) and Mastering the Infinite Game, Business Across Cultures, Did the Pedestrian Die?, Riding the Whirlwind and Servant Leadership Across Cultures.

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Abstract

A new logic is offered that challenges traditional change management whereby the shift from the present to a new future is replaced by an analysis of the inter-relationships between the present and future and thereby how to morph the best of the present with new opportunities rather than discarding the present. The research is set in the context of how traditional ways of working are being confronted by both the opportunities of exploiting ever pervasive technologies and demands from employees for a different work-life balance ~ namely more flexible and/or remote working. The framework proposed is based on identifying the tensions that derive from the momentum for change and expressing these as dilemmas. A step-wise approach is used to explore the dilemmas that inform the leadership through a structured debate and revealing approaches to their reconciliation. The framework is extended to show how alternative dilemmas can be quantified to provide the “best bang per buck.”

It is striking how US/Anglo Saxon models of change have dominated the world of change management. They are based on the view that organizations are task-oriented cultures and that traditions and past success needs to be forgotten as soon as possible. You formulate a bunch of new
goals, preferably in the context of a clear vision, and hire some expensive consultants to tell you to dump the ones that do not believe in your clearly set goals. In this approach, the organization is conceived as an instrument at the disposal of shareholders (i.e., *people who never share*) and where managers have an MBA and employees are called human resources.

Yet increasingly we witness the development of the autonomous and reflective individual. It is an individual that has a full set of needs, internal and external to the organization. Power is diffused and shared. In the *Financial Times*, Bouchiki and Kimberly (2001) stated “In contrast with traditional management, where structures and systems are derived from a predefined strategy, the new workplace will seek to balance what matters for the company (its strategy) and what matters for the individuals (their life strategies)” (pp. 4-5). In fact, management and employees decide and execute *inter-actively*. In this New World of the *customized workplace* in which priority for sustained personal development goes hand-in-hand with the employer’s business performance and growth, the reconciliation of dilemmas is the new source of authority. This is revealed even more dramatically in the process of continuing explosion in information technologies. Many pundits are now saying in the future, there will be few jobs but plenty of work. This is understandable if they mean fewer jobs with traditional ways of working.

Occam’s razor would define corporate culture as the ways things are done around here, but where is here? Traditionally the workplace is built around the way people are managed rather than the way people work. Business is becoming much more complex, hierarchies are giving way to human networks to solve difficult problems. In addition, space is becoming expensive, many workers’ jobs are becoming untethered from the office, and technology is enabling the mobilisation of social networks. For example we can work at home, share or *hot desk* or be fully mobile. (McGregor, 1960).

The change from traditional office-based working to different (better) ways of working necessitates a change in the way leaders perceive their employees and how things are done and experienced around here and there. Working attitudes and work practices need to change and this is the key to sustainability and performance gains; a work culture that supports this behavioural change in terms of Space, Technology, People and Processes will be more efficient, successful and sustainable than one which does not.

So how should leaders respond to this new paradigm? Most change models can be criticized for two principal and recurring reasons:

(i) they tend to underestimate the difficulty involved in achieving or sustaining the change; and

(ii) they tend to want to discard the current situation in favor of a new future, thus throwing out the best of what already exists.

After an extended period of research over many years and after developing dilemma theory, the authors have come to a different view, based on extensive evidence collected, which indicates that changing an organization’s culture is a contradiction in terms. This is because cultures act to preserve themselves and to protect their own living existence (Cameron & Quinn, 1998). So rather than seeing change as a *thing* opposing continuity, we see it as a difference. We believe organizations seek change to preserve the company, profitability, market share, and core competence. The reasons for changing in certain aspects are to avoid changing in others.
In short, organizations must reconcile change with continuity in order to preserve an evolving identity. Thus we offer a different approach. Our overall core framework requires an assessment of the differences between the current corporate culture and some envisaged ideal future corporate culture. But established models for change would then develop a change strategy based on transforming the organization from the current to ideal culture. Our approach is to consider the contrast between these extremes. All organizations need stability and change, tradition and innovation, public and private interest, planning and laissez-faire, order and freedom, growth and decay (Hampden-Turner, 1992). These are the opposites with which leaders wrestle and which put tensions into their world, sharpen their sensitivities and increase their self-awareness. The change problem from the current to ideal situation cannot be solved in the sense of eliminated, but can be wisely transcended. Successful leaders get surges of energy from the fusing of these opposites.

Thus these differences that generate tensions are the source of a series of dilemmas. Managing change in our methodology is therefore about reconciling these dilemmas. In this way we can overcome the limitations of current change models because we are neither simply throwing away the past, nor seeking to change a well embedded resistant self-preserving corporate culture. The key dilemmas derive from the competing demands arising from the fundamental components described in classic general system theory—namely those of internal business processes, employees, shareholders, society, and customers. No longer can we categorize individual employees as having common needs (Lewin, 1947). In our collaboration with Vodafone UK and their extensive research on new ways of working, we found how some employees were enthralled with the opportunity to work from home but others horrified. One woman said: “I can check my office email before breakfast, take the kids to school, get home quickly to my study, collect kids from school, prepare a family meal, and finally check my email before retiring to bed… and save 90 minutes of commuting. Not only does my whole work-life balance improve, but I would be more productive and save the company money in less office space.” In contrast, another said: “I live on my own in a bed sit with just four walls to look at it. I enjoy the hustle and bustle of commuting, and the camaraderie with my friends at the office. I go to work to have a social life.” Some employees are already working differently, even if not supported by their organization. One commuter said: “I start work on the train using my own notebook and pay for a reliable Wi-Fi connection myself. Even when I get to my office desk, my modern notebook is more productive than my clunky aging Windows XP based desktop that my employer has not updated.”

There are no simple solutions. It appears modern leaders would need to conjure juggling with too many balls in the air. New solutions are required that are grounded in a strategy that is aligned with the organization’s values. In other words, we need to link newer ways of working to the bottom line.

**Redefining Sustainability**

We have found that organizational sustainability (Senge, 2001) is not limited to the fashionable environmental factors such as emissions, green energy, savings of scarce resources, corporate social responsibility, and so forth. The future strength of an organization depends on the way leadership and management deal with the tensions within and between the five major entities facing Woolliams and Trompenaars
any organization: Efficiency of Business Processes (as one of the main responsibilities of managers), People, Clients, Shareholders, and Society—in the context that different ways of working offers new opportunities to stay ahead of the game. The manner in which these tensions are addressed and resolved determine the future strength and opportunities of an organization. And the task for today is to connect and integrate these drivers in ways that are more than just compromise. Flexible and remote working offers new opportunities to conceive the organization differently.

We have collected and analyzed some 10,000 of these tensions from our web-based online surveys from across the globe from the top Fortune 500 global companies and familiar household names through to more local or specialist companies. From this we have identified frequently recurring dilemmas, which derive from the competing demands between these five components. (See Table 1.)

Some early responses to new ways of working have been less successful as they have taken only the extreme horns of the dilemma. Thus solely trusting virtual employees to manage themselves without any management control is clear indulgence. At the other extreme, software that monitors remote office workers’ keystrokes and log in details, and so forth, as they work at home on their PC is draconian. Changing managements approach from monitoring inputs to outputs and deliverables is part of the resolution but requires additional parallel synergistic changes in behaviors, attitudes, trusts, and so forth.

Both these top down and bottom-up viewpoints are helpful to understand the tensions created by new ways of working, but ultimately it is the responsibility of the leadership/management to resolve these dilemmas and the tensions created. These frequently recurring dilemmas are listed below with a relatively high level of abstraction, but in practice we help clients restate them as to how they apply more specifically in their own organization. They are more embracing than just exploiting new technologies for remote working, but better ways
of working can not only generate new tensions, but also offer new solutions to these dilemmas.

<table>
<thead>
<tr>
<th>Golden Dilemma</th>
<th>On the one hand</th>
<th>On the other hand</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>(B: Employees) We need to develop our people for their future roles in different ways of working</td>
<td>(A: Business Processes) We need to become more cost conscious and results oriented.</td>
</tr>
<tr>
<td>2</td>
<td>(C: Shareholder) We need to exploit new ways of working to cut costs to support our shareholder’s return</td>
<td>(A: Business Processes) We need to invest in new ways of working for long-term sustainability.</td>
</tr>
<tr>
<td>3</td>
<td>(A: Business Processes) We need to supply standard products and services as defined centrally</td>
<td>(D: Client) We need to supply products/services that respond to local tastes and needs.</td>
</tr>
<tr>
<td>4</td>
<td>(A: Business Processes) We need to focus on Cash flow and Working Capital</td>
<td>(E: Society) We need to serve the wider community in a sustainable and responsible way.</td>
</tr>
<tr>
<td>5</td>
<td>(B: Employees) We need to empower, motivate and reward our people to work in new ways</td>
<td>(C: Shareholder) We need to satisfy our shareholders that their investment will remain secure as newer ways of working become the norm.</td>
</tr>
<tr>
<td>6</td>
<td>(B: Employees) We need to educate clients/customers to new and improved services we can offer by working in different ways</td>
<td>(D: Client) We need to keep the customer focus ahead of our own personal preferences.</td>
</tr>
<tr>
<td>7</td>
<td>(B: Employees) We need to retain equal opportunities for all existing staff and recognize their differing personal values</td>
<td>(E: Society) We need to apply some positive discrimination to increase diversity and recognize the new and changing world of work.</td>
</tr>
<tr>
<td>8</td>
<td>(C: Client) We need to satisfy our clients/customers wants and needs</td>
<td>(C: Shareholder) We need to generate both revenue and capital growth for our shareholders.</td>
</tr>
<tr>
<td>9</td>
<td>(C: Shareholder) We need to maximize shareholder return from our existing business</td>
<td>(E: Society) We need to adapt to the future as society evolves and new ways of working becomes even more pervasive.</td>
</tr>
<tr>
<td>10</td>
<td>(E: Society) We need to supply products and services that enhance our reputation in the wider community</td>
<td>(D: Client) We need to supply products which our clients and customers are asking for.</td>
</tr>
</tbody>
</table>

Whilst organizations share these similar problems during these changing times, their initial approach to try to solve them is usually rooted in their culture and past behaviors. Over adherence to any one single established model ranging from scientific management, a Theory Y human resource dimension basis, customer orientation, shareholder value or corporate social responsibility has each been shown over time to be unduly restrictive when applied in isolation. A new embracing framework is proposed that meets the dynamics and competing demands in modern (global) business that seeks to achieve real sustainability.

The Challenges for Securing Long-Term Success

Every organization seems to have different priorities when focusing on these dilemmas that need to be reconciled in order to achieve long-term success. It is not a matter of choosing between one extreme side of the dilemma, nor adopting a compromise (that will always be lose-lose). There are non-stop culture clashes and by culture we mean not simply the cultures of different nations, but those of different disciplines, functions, genders, classes, attitudes to technology, and so on.

Assessing corporate performance

If we use conventional metrics solely based on linear models, then these cannot adequately explain or diagnose how a given organization is responding to these dilemmas. In response, we have designed instruments that use combinations of questions that capture both sides of the dilemma such as:

- we are able to meet short-term demands without compromising our long-term vision
- there is a strong culture within which we can be flexible
- we learn from particular client needs to improve our general product/service portfolio
- we have teams that consist of creative individuals
- we integrate the products/services we develop with the evolving needs of the client/customer in mind

Within this instrument (our Cross-Cultural Assessment Profiler CCAP), we also invite respondents to place their organization on two-dimensional grids to obtain the current versus ideal state of each dilemma (see Figure 2).
And as expected, such measurements are culturally determined. A major U.S. giant is likely to be currently more focused on reducing costs, whereas a Chinese exporter may be more concerned to develop their people for their future roles in different ways of working. And thus, although different cultures share the same Golden Dilemmas, it is their starting point that is culturally determined—although they all seek an integration between the two extremes as their ideal.

**The new methodology in practice**

Irrespective of where one chooses to start, we distinguish the following steps for a change intervention:

1. Developing an envisioned future in order to develop a sense of what to go for;
2. Diagnosing the current corporate culture with our Cross-Cultural Assessment Profiler CCAP;
3. Defining Core Values and Key Purpose to develop a sense of what one stands for;
4. Defining the ideal corporate culture with our CCAP embedding core values and key purpose;
5. Defining major business dilemmas caused by the tensions between envisioned future and key purpose and between current and ideal corporate cultures;
6. Reconciling 4 or 5 major business dilemmas;
7. Diagnosing the current leadership competence to reconcile major value dilemmas; and
8. Implementing new design and defining concrete action points to be taken as defined by the change agents that both responds to the tensions from the desire to working in new ways as well as exploiting the business benefits.

The fifth step is crucial because it integrates business and cultural challenges. We don’t believe that a change process can be genuine if strategic business issues and cultural values are disconnected. This, unfortunately is often the case in change practice. But our key proposition is that, from the inputs of the envisioned future, core values, and key purpose and between current and ideal corporate cultures, all the ingredients are available to stimulate management to think about what basic dilemmas they need to resolve from their actual business to the desired one.

The dilemmas are best phrased as “on the one hand…on the other…” We often invite our participants to phrase the tensions they feel in actual business life and then relate them to the tensions they feel between current and ideal cultures. So for example as an actual business tension it is felt that “I feel that our organization is so much focused on next quarter results, we don’t have enough time to be creative and come up with our next generation of innovations.” This would be consistent with the scenario in which the current corporate culture is task oriented and the dominant espoused profile is more person oriented.

We often found a certain organizational culture had developed because the context best suited the main dilemmas their leader(s) were...
facing in business. So a person-based culture is often the result of a leader that strives for a core value of entrepreneurship and innovation while having an envisioned future of becoming the most pathbreaking organization in the field of cross-cultural management thinking and consulting. A task/goal driven culture is a much better suited context for leaders that want to help clients gain the highest return on their investments in the financial service sector holding a core value of integrity and transparency.

But business environments and challenges are changing continuously. Once an organizational culture has established itself, it creates new dilemmas (or its changing environment will) on a higher level. For example, a dominant person-based culture can create a business environment where many innovative ideas are born but where the management and commercialization of these begs on aspects of a more market sensitive task/goal-driven culture. Conversely, a dominant task/goal-driven culture can lead to an environment where employees are so much guided by their market price that it needs a power-based (family) culture to create a necessary longer term vision and commitment.

By asking leaders of organizations to phrase the major tensions they feel as “on the one hand...on the other” we linguistically program them to see both sides of the equation (Trompenaars & Hampden-Turner, 2002). In order to facilitate this balance in the approach as well as the link to business, we use a number of pro-formas to elicit the basic description of their current and ideal organizational culture profiles, components they want to retain and discard, as in the following basic framework seen in Figure 3:

<table>
<thead>
<tr>
<th>On the one hand we want more and/or keep the following values and behaviors of our</th>
<th>On the other hand we need to develop the following values and behaviors for supporting our envisioned future and core values:</th>
</tr>
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</table>

We ensure that the various lists comprise those that are most crucial to reconcile in view of the envisioned future. We make sure that the formulation of the horns of the dilemma are both desirable and are linked to business issues. Examples are: “on the one hand we need to focus on reliable technology (typical for a dominant role based culture), whilst on the other we need to be constantly informed by our main customers (typical for dominant task/goal based culture)” or “On the one hand we need to constantly mentor and coach our young graduates for constant learning (person-based culture) whilst on the other hand we need to focus on the income of this quarter (task/goal-based culture)”, or “on the one hand we need to develop and sustain a loyal workforce and thrive on rapport (power/family-based culture), whilst on the other hand we need to be able to judge their performance based on report (task/goal-based culture).”

Reconciling the change tensions
Space limitations will not allow us to go into all the detailed steps of the reconciliation process but we show the basic template (see Figure 4) we are using to graphically represent the dilemma:
Essentially this template uses a dual axis in order to invite participants to have the current values and behaviors dialogue with the ideal ones. This dialogue is essentially stimulated by asking the question: “how can we through the current value or behavior that one want to keep get more of the ideal value or behavior we want to strive for.” To stick to our previous examples, the essence of reconciliation is achieved when we answer the question: “How can we through focusing on our reliable technology get better informed by our customers” or “how can we through coaching our young graduates increase the income of this quarter.” Note that we need to change our “natural” mindset quite fundamentally. The traditional change processes often inquire about how we can change from one (current) value or behavior to another (desired) set of values or behaviors. The creative juices that are flowing from the integration of seemingly opposing values is astonishing. But also from a process standpoint, resistance to change is often broken (at least conceptually) because we need to keep and further develop the values that are positively graded of the existing state of the organization. It is a process of enriching values through change rather than replacing one value or behavior by another. And be aware that the spiral starts at the side of the current value/behavior axis and goes through the aspired value to an end somewhere at 10/10 where both values are integrated on a higher reconciled state. Once this position has been achieved conceptually it is time for the final stages.

Once the leader or groups of relevant leaders are in agreement on the dilemmas that need to reconcile, the action points to be taken evolve naturally. Very often it is crucial to know the typical levers that need to be pulled in an organization to increase the effectiveness of the actions that need to be taken. This very often is very dependent on the type of organizational culture that the organization currently holds. In family-oriented cultures, the function of human resources often plays a crucial role, while marketing and finance dominates in the task/goal-based cultures. The best levers to be pulled in the person-culture are often related to learning systems and intrinsic rewards while, in the role-based systems, procedures and manufacturing often play a crucial role. We use the following template (Table 3) to give some guidance to look at the action points to be taken:
Whilst the leadership will need initially to operate at the macro-level, the same thinking needs to be cascaded down so that the organization becomes a reconciling organization throughout.

**Whose agenda?**

There is a potential scenario that this logical systematic process can be used to achieve political/personal whims of the leader on the basis that it is objective and rational. We can overcome this by quantifying the pay-offs of alternative courses of action. Thus by assessing the current status of the dilemma against an ideal state that would result when the business benefits had been realized so that we are now in a position to now evaluate the business benefits against the costs, time scales to realize benefits, and the degree to which the dilemma solution is located in one profit center or involves co-operation across a number of business units as in Figure 5.

**Dilemma Portfolio Analysis**

![Dilemma Portfolio Analysis Diagram](image)

This type of analysis provides an objective evaluation of where the highest return on investment can be achieved in resolving the dilemma conflicts and thus secures the best benefits to the business.

In the particular example shown, the most important cultural dilemma that needed to
be addressed was the need for facilitating staff to work more remotely using new technology versus management expectation to keep staff under their observation in a central office. When faced with major decisions like these involving high levels of funding new technology, training, and human capital offset by office space savings, such analytical approaches help leaders to validate their tacit insights by making them explicit and open them to debate.

**Linking culture to business performance**

During the last twenty years, the fact that national and organization culture both need to be considered in modern business management has been increasingly recognized. And furthermore, a leader, even in a local company, will find they are leading and managing a workforce that is multi-cultural. Many of the conceptual frameworks for explicating culture are based around describing how different cultures give different meanings to relationships with other people, the meaning they give to their interaction with the environment, and to time and by other similar cultural dimensions. Similarly, much attention has been given to the recognition and respect for cultural differences. However, if we stop at only these first two stages, we run the risk of supporting only stereotypical views on cultures.

Throughout this research we have adopted a broadly inductive approach—with both quantitative and qualitative data collection and analysis. Data has been accumulated over time from our consulting as and when it arose based on client needs, but also we have sought to collect data pro-actively to fill in the gaps in our inquiry. The extensive data from these multiple sources serves to provide triangulation to our evidence. We can claim high reliability from our quantitative questionnaire-based studies and high validity from our in-depth interviewing, consulting, and coaching.

**Conclusions**

Through our methodology, we have helped many client organizations reconcile such dilemmas. Of course, as soon as you remove one, another pops up. But in today’s rapidly changing ever oligopolistic world, it is the very essence of organizations. Our aim has been to raise the debate for a new logic for the management of change.

So our agenda follows the logic that in order to secure long-term success as an organization, the cultural dilemmas between the various stakeholders need to be reconciled. Since innovation could be defined as combining values that are not easily joined, essentially this process is created by and leads to innovation. It is the innovative capability of organizations, from process to product, from research and development to human resources that will make an organization sustainable. And it is far more than just Corporate Social Responsibility!

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References


Cross-Cultural Competence:
Performance-Based Assessment and Training

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ABSTRACT

A trans-disciplinary conceptualization of cross-cultural competency was used to develop performance-based assessment and training methods. Starting with socio-cultural encounters (interactions among people holding different cultural perspectives), we elicited cultural dilemmas based on culturally universal dimensions through surveying U.S. military personnel having cross-cultural operational experience. We used these dilemmas to build assessment and training tools, and pilot-tested simulations. Although our efforts focused within a military setting, our approach is applicable to any organizational and professional setting.

Key words: cross-cultural competency, performance-based assessment, performance-based training, socio-cultural encounters, cultural dilemmas

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Organizational development practitioners need good theoretical perspectives to explain culture. This is nothing new, as humans have been attempting to understand culture as long as there have been humans, beginning when culturally diverse nomadic bands first encountered each other during prehistory. And the stakes have always been high, as the outcome of such encounters have always had life or death consequences. Recently, U.S. military leaders have emphasized the need to develop cross-cultural competence (3C) within their organizations. This focus becomes especially important as warfare shifts for the USA from simply destroying an enemy by force to engaging in nation-building and peace-keeping, as negotiating cultural divides are now seen as crucial for modern warfighters. In the case of warfighters, where the next battle arena may be unknown, so it is particularly important to conceptualize 3C in a general way, which allows operating effectively within diverse cultural environments in contrast to only being applicable to specific cultures. Of course, general 3C can be augmented by acquiring specific cultural proficiencies, such as linguistic and regional knowledge, but it is crucial to develop general 3C applications for warfighters. And this does not just apply to the

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in actual interactions, or in imaginary or virtual interactions. The competence aspect of SCEs is based on the outcomes of these encounters.

To frame and understand 3C from such an interactional perspective, we use cultural values dimensions. Although there are many systems to understand and apply cultural values dimensions, we based our approach on that of Trompenaars and Hampden-Turner’s (1997) work, which uses seven basic dimensions: universalism-particularism, individualism-collectivism, neutral-emotional, achievement-ascription, sequential-synchronic, and internal-external control. During SCEs, individuals and groups with differences on these cultural values dimensions may develop misunderstandings and possible conflicts. This “collision” results in cultural dilemmas, while 3C involves interacting successfully during SCEs by recognizing and respecting cultural value dimensions and using them to reconcile differences and optimize outcomes from cultural dilemmas. Consequently, our approach to 3C uses tools involving experiential assessment and training based on participants’ actual performance, including virtual scenarios and simulations. This is quite different from employing self-report questionnaires that look at the individual, as instead we are looking at interactions.

In addition, although we are looking at 3C, we are attempting to keep this at a general level. This entails difficulties, as all SCEs are interactions in some specific cultural context, but the underlying principles needed to negotiate them successfully can be general, as in understanding and applying cultural value dimensions. Our stance is that this deeper understanding of cultural dilemmas can prepare warfighters and others to deal with SCEs, even in the absence of specific 3C, as these cultural value dimensions operate in a universal fashion (e.g., all military as, in an increasingly global world, actors must be prepared to negotiate the great diversity of cultures in business, education, governments, healthcare, and almost all organizational settings.

Consequently, Vcom3D, a private corporation, and the Defense Equal Opportunity Management Institute (DEOMI) have collaborated to better conceptualize 3C to development assessment and training programs for the U.S. military. DEOMI is a non-profit U.S. Government organization, whose mission is to assist customers in enhancing their mission readiness and capabilities by promoting human dignity through education in equity, diversity, and cultural competency, as well as to provide research and worldwide consultation. Vcom3D develops game-based, immersive simulations for assessing and training interpersonal skills. The first two authors of this paper serve as cultural and organizational development consultants to VCom3D in the project. This paper reports our joint efforts to develop a globally appropriate conceptualization for understanding 3C from a general perspective, and also applications for this type of 3C assessment and training.

The foundation of our approach involves the three interrelated concepts of socio-cultural encounters (interactions among people who hold different cultural perspectives; SCEs), cultural values dimensions, and cultural dilemmas. Most fundamentally, our approach supports current and previous 3C tools, but adds value by shifting the focus from the individual to an interactional vantage, namely by viewing these as occurring within SCEs rather than as within individuals. Specifically, we see 3C not as individual traits, such as skills and abilities, but as performance-based during interaction in culturally-diverse situations. SCEs may be experienced and observed in actual interactions, or in imaginary or virtual interactions. The competence aspect of SCEs is based on the outcomes of these encounters.

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Arab cultures, it is possible to train a warfighter to recognize a Qur’an from other books and to realize the importance of seating arrangements. However, in more general 3C training, we seek not to train the student to recognize specific actions and artifacts, but to discern visual and aural indications that the stakeholders view the situation from a different cultural perspective, regardless of the specific culture involved. That is, all cultures have their actions and artifacts that are meaningful. We therefore plan to include visual and aural cues in our simulations that must be recognized as potentially significant, even though the learner has not been trained in the specifics of the culture being simulated. For example, people everywhere have meetings in which cultural values influence the actions and expectations of stakeholders in those meetings. Meetings of locals and visitors happen in cultures around the world, but the cultural orientations of actors in the meetings vary considerably.

The Conceptual Problem

Although culture is a word commonly used in many situations, few people actually understand it, and culture as not being an easy concept to grasp. Insofar as there is increasing cultural complexity in the contemporary world, these difficulties are of growing relevance to all spheres of life. One way to begin to envision this complexity is to examine the “cultures of those people who study culture.” There have been many different approaches to understanding culture. In addition, all who try to understand culture start from their own cultural assumptions, which are always an impediment that has to be overcome to understand the cultures of other people. There are also many differences, such as national and regional, religious and ethnic, and organizational differences, that may contribute...
acquisition and transfer within and across societies. SCEs became the platform for subsistence acquisition and sharing, economic exchanges, kinship, socialization, conflicts, and all the human activities we have recognized as human culture. Further, worldviews, beliefs, and values formed the basis for participants’ behaviors within SCEs. In early human societies, most participants entered SCEs with homogeneous or at least similar worldviews, beliefs, and values. A fundamental social basis of band and tribal societies was the shared culture among the members of those societies. Conflicts and misunderstandings in SCEs due to cultural differences were infrequent, as potential misunderstandings across cultures were limited to infrequent contact with others who might wander into a band or tribe’s path. As human relations evolved into more complex societies, however, their SCEs also became more complex. Trading, kinship-related village ties, population growth, and conquest of one societal group over another became more frequent reasons for humans to interact with others who were culturally different from them. Exploration, military conquest and occupation, human migration, ecological pressures, and missionary efforts were all driving forces behind increasing diversity in SCEs. Homogeneous SCEs within small cohesive groups were shared due to ethnicity, political affiliations, and economic exchange principles. However, heterogeneous SCEs became more frequent with greater diversity, and the participants within SCEs increasingly needed to understand and be able to be competent with humans from other groups. In the era of colonialism, a common strategy for harsh approaches to cultural differences. In more recent times, as some societies have developed a greater appreciation for cultural differences,
there has been increasing interest in cooperation, compromise, and even reconciliation during SCEs.

For these reasons, we consider SCEs to be the basic unit of analysis for understanding 3C, and for applications such as 3C assessment and training. Our focus, again, is not on the individuals as actors, as much as on the SCEs themselves, which always involve at least two actors. It is the pattern between the two, or among larger numbers, that determines whether SCEs are adaptive or not, as this does not just depend solely on the attributes of individuals, such as their individual skills and abilities, but also on their interactions, which are more than the sum of their individual parts.

Cultural dilemmas occur during SCEs in which there are actors with different and often competing, and even conflicting, worldviews, beliefs, and values. These dilemmas involve differences that are often not well understood by the actors involved, who may approach the dilemma from their own cultural vantage, while being relatively blind to that of the other. SCEs are fundamental to understanding culture, but it is the concept of cultural dilemma that holds the real power during SCEs. The outcome of SCEs in which cultural dilemmas need to be handled provides our way to approach 3C operationally. When cultural dilemmas are resolved and reconciled successfully in a particular context, this reflects high 3C in that context. This approach is culturally relative in that what might work well within one cultural context might fail abysmally in another, so there are no universally right or wrong ways to demonstrate 3C. Instead, there are adaptive behaviors that work within the SCE and involve interactional, not just individual, attributes. Cultural dilemmas can be observed in SCEs within any operational context as the individual actors attempt to navigate complex, and often competing or even conflicting, circumstances. Using 3C for resolving and reconciling cultural dilemmas within SCEs is a fundamental requirement for the understanding of behaviors needed to create adaptive responses. Being able to apply 3C in new contexts, such as by recognizing universal cultural value dimensions and cultural dilemmas, is essential for those likely to encounter others with unfamiliar cultures—and that is the essence of our approach to general 3C.

The Methodological Problem

The ethnographic record tells us that tribal societies usually divided people into “humans” and “non-humans,” with one’s own society inevitably referred to as human and all others referred to as non-human. The concept of so-called “races” was identified to categorize humans according to superficial physical traits, but the number of races and their characteristics has never been a scientifically valid concept. In 1537, Pope Paul III decreed that all the diverse peoples encountered in European explorations were indeed “human” (and not subhuman, as many Europeans had thought). In the 19th century, anthropologists began to conduct ethnographic research, in particular on the tribal societies of the world, while in the 20th century, there were concerted attempts to make sense of all the ethnographic research. Until the 1980s, most cultural research was conducted by anthropologists and sociologists, with some modest contributions by psychologists and other social scientists.

In recent decades, however, there has been a burgeoning interest in culture from many disciplines, such as management, organizational behavior, and psychology, which have tended to approach culture primarily from an individualistic vantage. A variety of concepts and methods for
understanding culture, as well as 3C, have emerged from these efforts, as economic, political, military, and other human activities created increased needs to adapt to the newly emerging global community. The current situation is that most 3C methods are limited in appropriateness by professional and disciplinary myopia focused on the individual level of analysis. There has been a proliferation of self-report inventories, for example, which involve an individualistic focus, and that do not very effectively operationalize cultural variables such as 3C. In fact, considering culture only from an individualistic perspective is itself congruent with Western cultural biases, as Western culture is known for being individualistic (Trompenaars and Hampden-Turner, 1997). Due to these disciplinary and Western biases, many 3C concepts and methods are not culturally relative, and many do not adequately cover the range of human variation. For example, cultural dilemmas within SCEs do not have any “right” answers, which some persons might find disturbing. Instead, the options for behavior during SCEs are based on the values and worldviews of various actors in the context of the encounter, and these interactive variables determine the outcome, which may or may not be adaptive. In fact, the very reason something is a dilemma is that it has no singular correct answer. If one option in dealing with a cultural dilemma is presented as consistently superior over others, the approach is inevitably based on ethnocentric biases.

**Our SCE/Dilemmas Approach**

We are eliciting and using actual cultural dilemmas within SCEs to develop a culturally relative and globally appropriate method for general 3C assessment and training for warfighters. More broadly, however, we are interested in all settings, not just those associated with the military. Our anticipated products, which are works in progress, will include the following: Cross-Cultural Dilemmas Assessment (CCDA), Cross-Cultural Dilemmas Simulations (CCDS), a resultant database of responses from both the CCDA and CCDS, and the Cross-Cultural Dilemmas Training System (CCDTS). We present these as stages with details on how they have been, or will be, developed.

**Stage One: Cross-Cultural Dilemmas Assessment (CCDA)**

From January to May, 2012, we conducted focus groups of experienced warfighters from all 5 U.S. military services. Our participants consisted of 7 focus groups of 15 to 16 members each, with a total of 108, who were attending the DEOMI Equal Opportunity Advisor (EOA) training course at Patrick Air Force Base in Florida. In these focus groups, our team elicited cultural dilemmas experienced by the participants during their military assignments, both domestic and international. Most participants had served in operations in Iraq, Afghanistan, or other combat areas. Our goal was to create cultural dilemmas to use as the content for the CCDA and subsequent 3C assessment and training.

The elicited cultural dilemmas were harvested, and then classified in an inventory according to the most prominent cultural dimensions (e.g., individual vs. collective) present in the SCE. Then, the cultural dilemmas inventory was analyzed, and selected dilemmas were chosen by the project team for inclusion in the initial version of the CCDA. This initial version of the CCDA includes 20 scenarios in which participants were asked to review a situation involving actors with different cultural orientations and values related to the SCE. Four possible choices were presented, and the
participants were asked to select one response from the four to address the dilemma. The choices are presented as forced choices, in which the opposites of a cultural dimension are two of the choices (10, 0; 0, 10 on a cultural mapping grid), while the remaining response options include an apathy response (0, 0) and a compromise response (5, 5). The forced choice options yield the participants’ “best” choice for how they would respond in the SCE in an actual situation.

In our approach, 3C involves a developmental process for achieving recognition, respect, resolution, and reconciliation of cultural differences. Our plan is that future participants in the CCDA will eventually receive a profile of their responses to the cultural dilemmas based on a framework using Trompenaars’ (1997) cultural seven-dimension model. The participants will be shown their profile on each of the seven dimensions, with their positions on the scales indicating their values orientations within that framework. This will enable participants to better understand their cultural orientations, which is the first step in our approach to becoming culturally competent. This respect and recognition stage is essential for the next stages, resolution and reconciliation of cultural dilemmas.

There are some similarities in form between the CCDA and Situational Judgment Tests (SJTs) that are used to predict job-related performance. A SJT presents a user with a job-related situation and a set of possible responses to the situation, in either word or multimedia format, and the user is required to select from the alternatives (see, for example, Lievens, Peeters, & Schollaert, 2008). However, there are important differences when comparing our approach. Whereas SJTs are generally designed to grade a user’s (e.g., job applicant’s) predicted job performance, the CCDA response profile is not meant to be viewed as good or bad in any way, as it is merely descriptive. In addition, the CCDA is not intended as a test, but as a non-judgmental characterization of action within a socio-cultural context. The CCDA dilemmas will furthermore be used in a later stage of the project for interactive training in which a response to an initial situation may impact later interactions.

During the spring of 2012, the CCDA was administered twice. For the first administration of CCDA, responses were collected from each of the 108 EOA students. After minor revisions, the CCDA was administered to a second class of 132 EOA students. Most of the students responded to all 20 dilemmas, while a few completed a smaller number. Three of the dilemmas and their associated distribution of responses for all 240 students are described, as follows:

Dilemma 5. You have been assigned as an advisor to a local public works project in Asia. You notice that the local leader who is in charge of managing the work group for the project is promoting only people from his village and kinship group. The supervisors he selects are older men, who may not be as motivated or educated as the younger workers in the project. You are concerned that this practice is affecting the productivity of the work group. However, you do not want to cause the local leader to “lose face.” **What do you do?**
Dilemma 10. Your mission is to build rapport with the elders of a traditional rural village in Afghanistan. The village is located in an important area of a region occupied by insurgents. Winning the support and cooperation of the village elders is critical to the security of the region. After brief introductions, your Afghan host, a representative of the elders present in the initial village meeting, offers a hookah pipe. Your interpreter explains that the elders will be insulted if you refuse to participate in this ritual. You suspect the pipe contains hashish. What should you do?

<table>
<thead>
<tr>
<th>Option</th>
<th>No.</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Don’t get involved. It is best not to get involved with local practices.</td>
<td>43</td>
<td>17.9</td>
</tr>
<tr>
<td>Support the local leader and his practices. He should know the best way to select supervisors for the work group.</td>
<td>60</td>
<td>25.0</td>
</tr>
<tr>
<td>Tell the local leader that his practices are not acceptable. Promote achievers who will be the best supervisors.</td>
<td>69</td>
<td>28.8</td>
</tr>
<tr>
<td>Send the local leader to a training course to learn about promotion practices.</td>
<td>65</td>
<td>27.1</td>
</tr>
<tr>
<td>No Response</td>
<td>3</td>
<td>1.3</td>
</tr>
<tr>
<td>Total</td>
<td>240</td>
<td>100.0</td>
</tr>
</tbody>
</table>

Figure 1. Student responses for dilemma involving the ascription / achievement cultural dimension.

Dilemma 5 Explanation. This 3C dilemma involves the cultural value dimension of achievement-ascription. The achievement response (10, 0) is in apparent opposition to the ascription response (0, 10). The apathy response (0, 0) and the compromise response (5, 5) represent positions not at the opposites of the achievement-ascription values dimension. These responses indicate that there is considerable diversity in the participants’ responses to this particular 3C situation. In this SCE, the warfighter might hold achievement values, while the values of the locals might be based on ascription.

<table>
<thead>
<tr>
<th>Option</th>
<th>No.</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Refuse the hookah pipe.</td>
<td>114</td>
<td>47.5</td>
</tr>
<tr>
<td>Join your host and the elders in the ritual.</td>
<td>19</td>
<td>7.9</td>
</tr>
<tr>
<td>Smoke the pipe but don’t inhale.</td>
<td>45</td>
<td>18.8</td>
</tr>
<tr>
<td>Offer to smoke next time you visit the village.</td>
<td>53</td>
<td>22.1</td>
</tr>
<tr>
<td>No Response</td>
<td>9</td>
<td>3.8</td>
</tr>
<tr>
<td>Total</td>
<td>240</td>
<td>100.0</td>
</tr>
</tbody>
</table>

Figure 2. Student responses for dilemma involving the specific / diffuse cultural dimension.
**Dilemma 10 Explanation.** This 3C dilemma involves the cultural value dimension of specific-diffuse. The specific response (10, 0) is in apparent opposition to the diffuse response (0, 10). In this particular SCE, the warfighter might hold specific values, while the values of the elders might be diffuse.

**Dilemma 11.** You are a squad leader. While visiting an Afghan village, one of your soldiers is encouraged to remove his helmet and sunglasses by a young woman in the village. She giggles and playfully shows interest in the soldier. He returns the interest and gestures for her to remove her veil. She removes her veil to reveal her face to the soldier. The woman’s younger brother sees her without her veil. He is appalled and begins to beat her with a stick. **As the squad leader; how should you handle this situation?**

<table>
<thead>
<tr>
<th>Option</th>
<th>No.</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ignore the beating. Move on</td>
<td>34</td>
<td>14.2</td>
</tr>
<tr>
<td>before the situation becomes</td>
<td></td>
<td></td>
</tr>
<tr>
<td>worse.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Stop the boy from beating his</td>
<td>58</td>
<td>24.2</td>
</tr>
<tr>
<td>sister.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Locate the father and</td>
<td>102</td>
<td>42.6</td>
</tr>
<tr>
<td>apologize for your Soldier’s</td>
<td></td>
<td></td>
</tr>
<tr>
<td>behavior.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ask the brother to stop.</td>
<td>38</td>
<td>15.8</td>
</tr>
<tr>
<td>No Response</td>
<td>8</td>
<td>3.3</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>240</td>
<td>100.0</td>
</tr>
</tbody>
</table>

Figure 3. Student responses for dilemma involving the particular / universal cultural dimension.

**Dilemma 11 Explanation.** This 3C dilemma involves the cultural value dimension of universal-particular. The particular response (10, 0) is in apparent opposition to the universal response (0, 10). In this SCE, the values of the warfighter might be universal, while the values of the village might be particularistic.

**Stage Two: Cross-Cultural Dilemmas Simulations**

The next stage in the development of our 3C assessment and training approach is to develop 3C simulations, the CCDS. These simulations will require that the participants have completed the CCDA. When participants enter the CCDS experience, they will navigate through a series of SCEs involving cultural dilemmas to complete a mission. As the participants encounter the various SCEs, they will choose responses to interact with the actors in the scenario. Simulations provide opportunities to achieve resolution and reconciliation of cultural dilemmas within the SCEs being simulated. By navigating through a series of related situations, the participant will have opportunities to interactively learn to anticipate second- and third-order consequences of actions in SCEs. Difficulty can be gradually increased by adding complexity, distractors, and time pressure within the simulations, in which learners must respond and navigate human interactions involving actors with different cultural expectations in the SCEs. These provide progressive challenges in experiential learning of 3C, while interactive scenarios provide authentic visual and aural cues, including subtle non-verbal signals. Recognition of these non-verbal cues has been identified as one of the most important 3C skills by warfighters returning from deployments (Zbylut, Metcalf, McGowan, Beemer, Brunner, and Vowels, 2009). Practice and reflection also has been
shown to build skill and confidence (Klein, 1998).

As of June 2012, the technology pipeline for creating the CCDS has been developed and tested, and we are beginning to implement the simulations using Vcom3D’s virtual human characters and the Unity 3D animation engine. One of the important considerations we intend to address is the required “fidelity of the task stimuli” (Lievens et al., 2008), which may include the use of subtle non-verbal actions that may signal characters’ intent, level of engagement, or emotional reaction. For a description of the technology and methodology used for creating these simulations, the reader is referred to Sims (2005) and Silverglate, Sims, Friedman, and Glover (2011).

Our SCE simulations incorporate theories of human emotion, specifically based on appraisal theories of emotion (Scherer, 1997), which are used to modify the virtual humans’ non-verbal cues in response to trainee actions. Perceived events are appraised along a number of dimensions such as how well the event fits with the virtual human’s goals (goal conduciveness), how well the event fits within established norms (internal and external standards), and how surprising or novel the event is. We implement a subset of Scherer’s appraisal and emotion dimensions. The outputs of the appraisal-based emotion system include an immediate emotional appraisal based on each perceived event, and an updated running average emotional state (updated with every event) that allows for a more coherent basis for generating behavior. It is this appraisal process that accounts for the interpretation of actions as rude or improper.

As a pilot test of the CCDS technology, we developed a Judgmental Use of Force (JUF) scenario based on experiences of U.S. Marines who had been deployed during Humanitarian Assistance/Disaster Relief Operations. Rather than place the JUF scenario in a real culture, we created a Caribbean island culture called Grand Mélange. This multi-ethnic culture includes population groups of African, European, and mixed heritage. In order to accomplish the mission of delivering supplies to assigned communities damaged by a hurricane, the student must resolve a series of dilemmas by observing and understanding the perspective of civilian, NGO, and local leaders, and adapting his actions accordingly. In one interaction, shown in Figure 4, the student confronts a young, desperate man commandeering disaster relief supplies for his own village. The culture of the man’s ethnic group places a high value on ascribed status and the collective good, and is highly “affective” in communication.

Figure 4. Scene from Judgmental Use of Force Simulation

As the simulation progresses, the situation reaches an apparent impasse when the young man explains that supplies have been promised to his father by other Americans, and that his village is just as much in need of food as the one to which the Marine has been ordered take the supplies, and that he will use force to commandeer the supplies, if necessary. The young man displays highly emotional behavior, including waving his pistol.

When 40 American service members interacted with this simulation during pilot testing at DEOMI and other locations, their courses of action ranged from immediate capitulation to the man’s demands to shooting the man within the first 10 seconds. In between there was a wide range of courses of action that included negotiating to divide...
the supplies, meeting with the man’s father to resolve the issue, and enlisting the man’s assistance in distributing supplies in return for sharing them with his village. Students who engaged in the simulation more than once were more likely to avoid violence and work cooperatively with the villagers to distribute the supplies equitably. These initial results provide encouraging evidence that (1) we are providing sufficient visual and aural cues to engage the student and support decision making, (2) that the simulations will elicit a wide range of responses among students, and (3) that multiple exposures to the dilemmas results in improved cross-cultural competency. The method used for the Judgmental Use of Force simulation is now being applied to develop simulations based on the dilemmas elicited from the EOA students.

**Stage Three: Cross-Cultural Dilemmas Database**

The administration of the CCDA, and eventually the CCDS, will enable us to build a database (CCDDB) for on-going research. This research will involve exploring reliability and validity of the CCDA, CCDS, and other related products, such as the CCDTS. The database will also support research and development in 3C concepts and methods. At this time an initial database of 20 cross-cultural dilemmas has been completed and tested with 240 military personnel, including all 5 U.S. military services, as well as some Department of Defense civilians.

**Stage Four: Cross-Cultural Dilemmas Training System (CCDTS)**

The CCDTS will use the CCDA and CCDS as foundations for building 3C, and is our final anticipated product. We plan to develop an initial assessment of participants’ cultural orientation based on the CCDA. This will not assess individual 3C, as again that is seen as an interactive variable, but will help orient those assessed to their stance on the various value dimensions. Then participants will use the experiences of the CCDS in resolving and reconciling dilemmas among actions in the various scenarios of the simulations, which would be experiential training, culminating in participating in the CCDTS. Our vision is that, just as airplane pilots now routinely practice on realistic simulations prior to risking lives and expensive aircraft, warfighters and others will eventually engage in 3C simulations prior to deployment in cross-cultural contexts that have similar exposure to risk.

**Conclusion and Next Steps**

We have completed Stage One, the initial development of the CCDA. To accomplish this task, we have elicited dilemmas in focus groups, and these have been classified and analyzed, as well as re-administered in a pilot version. These will be included in the CCDDB as we continue to elicit dilemmas from relevant populations and further build the database. The database will be used for the continued refinement of the CCDA. We will also use it for the development and field testing of the CCDS and the CCDTS. As each stage is developed, we will field test and, as appropriate, validate the content. The eventual product will include a performance-based approach for preparing warfighter and other personnel for the variety of cross-cultural experiences they might encounter in missions and operations around the world. It is expected that the assessment and training products will facilitate participants’ 3C performance in ways appropriate for any specific SCE, namely general 3C. Our applied goal is to provide cost-effective and scalable uses
of technology to better assess and train participants in 3C by interactively developing the perspectives and skills which could enhance their effectiveness for cross-cultural adaptation in a variety of SCEs.

References


Coaches’ Coach Competence and Influence on Organizational Learning

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Abstract

One purpose of the present study was to investigate the relationship between athletes’ perceptions of their coaches’ coaching competencies and its relation to organisational learning. Coach competencies were measured by a 15-item coach competence scale (CCS), which captures important coach capabilities at five dimensions in terms of different competencies which coaches must possess in their roles as coaches. Learning organisation was measured by a modified version of the learning organization questionnaire (DLOQ). The dimensions of the DLOQ were designed to measure the learning culture in organizations. Participants in this study were 269 junior athletes from sports participating in a questionnaire measuring their thoughts and feelings relevant for their participation within their sport.

Keywords: Coaching, sport, learning culture

Within sports, research reveals that the coach is an important factor in developing successful athletes (Blom, Watson II, & Spadaro, 2010; Jowett & Cockerill, 2003). The coach-athlete relationship is, therefore, at the heart of the coaching process and it is the interactions between coaches and their athletes that generate the athletes’ learning and results (Jones, Armour & Potrac, 2004; Jowett & Cockerill, 2002). The processes of coaching have,
therefore, occupied researchers in the field of sports for several years (Abraham, Collins & Martindale, 2006; Chelladurai, 2007; Côté & Gilbert, 2009; Myers, Chase, Beauchamp & Jackson, 2010; Myers, Feltz, Maier, Wolfe & Reckase, 2006; Myers, Wolfe, Maier, Feltz & Reckase, 2006). During the last few decades, coaching has developed as its own profession that claims that coaching is a new and effective route in the process of achieving growth and development of others (Fillery-Travis & Lane, 2006; Gallwey, 2000; Moen, 2010; Whitmore, 2002). The importance of relationship issues is highlighted, and it is the conversation between the coach and the coachee that is the central element in the coaching process (Grant, 2006; Hall, Otazo, & Hollenbeck, 1999). By the use of powerful questioning and actively listening to the coachee’s perspective, coaching is aimed at stimulating the growth and development of others (Downey, 2003; Flaherty, 1999; Moen, 2010; Whitmore, 2002). The process builds upon the fact that learning is stimulated, and coaching should therefore stimulate the development of a learning culture (Clutterbuck & Meggison, 2005; Clutterbuck, 2007). Thus, there should be a relationship between coaching competencies among coaches in sport and the learning culture that is created inside their teams. The purpose of the present study was therefore to investigate how athletes’ perceptions of their coaches coaching competencies are related to their perceptions of culture in perspective of learning and development.

**Theoretical approach**

A successful helping relationship between a coach and an athlete in sport should stimulate to grow and develop the athlete’s talents and capabilities (Jowett & Poczwarski, 2007). The coach–athlete relationship is found to be particularly crucial in terms of creating a positive outcome or not for the athlete (Jowett & Cockerill, 2002; Lyle, 1999). Numerous studies have investigated how the leadership behaviors of coaches can affect athletes’ satisfaction, performances, self-esteem, confidence, and anxiety (Chelladurai, 1990; Jowett & Cockerill, 2002; Jowett & Ntoumanis, 2004; Olympou, et al., 2008). Other studies that have investigated relationship issues claim that effective relationships include basic ingredients such as empathic understanding, honesty, support, liking, acceptance, responsiveness, friendliness, cooperation, caring, respect, and positive regard (Jowett & Cockerill, 2003; Jowett & Meek, 2000). On the other hand, research claims that ineffective relationships are undermined by lack of interest and emotion, remoteness, even antagonism, deceit, exploitation, and physical or sexual abuse (Balague, 1999; Brackenridge, 2001; Jowett, 2003). Thus, needed competencies for elite coaches have earned attention in the field of sport coaching, and needed competencies seem to be crucial in order to build effective relationships (Abraham, Collins & Martindale, 2006; Chelladurai & Doherty, 1998; Chelladurai & Riemer, 1998; Demers, Woodburn & Savard, 2006; Duffy, 2008; Durand-Bush, Thompson & Salmela, 2006; Jones, Armour & Potrac, 2002; Jowett & Cockerill, 2003; Jones et al., 2004; Westera, 2001). In this case, the coach in a sport is viewed as the director of the athletes’ training and activities, and has numerous of different tasks to fulfil (Jones, 2006; Jones & Wallace, 2006). However, coaching as a process is also viewed as a profession in its own right, which is focusing on the communication process between a coach and the person who seeks help (Grant, 2006). In general, the field of coaching can be understood
as two different concepts inside sport, those who claim that coaching is everything a coach does to realize the athlete’s potential (Jones, 2006), and those who claim that coaching is a specific method to realize that potential (Downey, 2003; Whitmore, 2002). The first understanding sees coaching as synonymous with everything the coach does that results in growth and development of the athlete. The second understanding sees coaching as a particular method that focuses on the conversation between the coach and the athlete, where empowerment of the athlete through powerful questioning and active listening are essential in the coaching process.

Coaching as a Profession

Gallwey (1997) and Whitmore (2002) are recognized as two important contributors to the development of the coaching profession (Stelter, 2002). Their experiences and knowledge from sport were transferred into the workplace to develop professionals in business (Gallwey, 2000; Grant, 2006; Whitmore, 2002). Since then, the coaching profession has escalated dramatically and it is claimed that coaching in sport is far behind the coaching profession outside sport, especially regarding the quality of the coaching itself (Hall, et al., 1999; Whitmore, 2002). However, in the perspective of learning and development, coaching as defined by the coaching profession is at least one of several domains coaches in sport need to fulfill in order to be effective (Moen & Verburg, 2012). Learning and results are essential in the competitive arena in sport, and coaching as defined by the coaching profession is recognized as an effective tool in order to achieve growth and development. A coach’s coaching competencies as described by the coaching profession should therefore be important in sport (Whitmore, 2002).

The coaching profession states that coaching is about establishing a helping relationship between a coach and the person with whom the coach is engaged, a coachee (Gallwey, 2000; Grant, 2006; Whitmore, 2002). The power of the individual as capable of finding solutions to his or her own problems with the help of a facilitating coach is highlighted (Moen & Kvalsund, 2008). This approach is a client-centred one influenced by humanistic psychology, which emphasizes the importance of listening to the subjective beliefs of the client (Kahn, 1996). This optimistic and trusting view of human nature is central to the field of coaching today. In this study, the following definition is used: “Coaching is a method that aims to achieve self actualization by facilitating learning and developmental processes to promote the resource base of another person. The method is characterized by its active involvement of the coachee through powerful questioning and active listening” (Moen & Kvalsund, 2008). Thus, in this study coaching is defined as an approach that can be used to fulfill people’s potential and improve their talent through goal oriented conversations.

Coach Competencies

Researchers have noticed that practicing coaches and coachee’s are lacking a well-established, reliable, and valid instrument for measuring coachee’s perceptions of coach competencies (Moen & Federici, 2011). A coaching competence scale (CCS), consisting of five dimensions, was therefore developed and validated to help fill this void in the field (Moen & Federici, 2012). The CCS consists of five different dimensions of coach competencies; (1) Creating the relationship, 2) Communication attending skills, 3) Communication influencing skills, 4) Making the responsibility clear, and 5) Facilitating for learning and results. In order to be effective and successful in coaching the coach must develop his or her capabilities in accordance...
with the competencies described in the CCS.

**Creating the relationship.** The true nature of the coaching relationship is based on mutuality. Mutuality is a relation that is built upon respectful understanding and responsive listening and interacting (Kellett, Humphrey & Sleeth, 2006; Lavoi, 2002; Moen, 2010; Zeus & Skiffington, 2002). To create such a relationship, the coach must be able to meet the coachee with trust and respect.

**Communication attending skills.** The ability to ask the right questions followed by the use of active listening is key techniques in coaching (Moen & Kvalsund, 2008). The coach’s attending skills are supposed to give the coachee an impression that he or she has the coach’s full attention and is seen, heard and understood. Listening skills, both active and passive, are important as they enable the coachee to continue to discuss and explore the case in focus (Ivey & Ivey, 2006). Therefore, a core competency for coaches is the ability to use attending skills.

**Communication influencing skills.** Once the coachee’s stories have been truly heard and understood, the coachee will be much more open and ready for change (Ivey, Andrea & Ivey, 2012; Moen, 2010). The coach’s influencing skills are supposed to influence the coachee’s motivation and behaviour in order to help the coachee to achieve changes. Asking powerful questions that are open-ended (beginning with an interrogative who, what, how, where and when) are important because such questions encourage descriptive and detailed answers (Ivey & Ivey, 2006). Therefore, another competency for coaches is the ability to use important influencing skills.

**Make the responsibility clear.** Awareness is a prerequisite for being able to take responsibility (Moen, 2010). Responsibility cannot be taken for something of which one is unaware. It’s essential for coaches to clarify that the coachee is responsible in his or her learning process. In addition, extended use of attending skills, especially in the beginning of the conversation so that trust is established stimulates the coachee to open up, speak, and explore the case in focus. Then, influencing skills are used to achieve a deeper understanding of the case, and both the coach and the coachee will achieve better knowledge of the case and its forming. This helps them both to become more prepared to take responsibility and make optimal decisions regarding the case. Another core competency for a coach is therefore defined as the ability to make the responsibility clear between the coach and the coachee.

**Facilitate learning and results.** The coaching process is supposed to encourage the coachee to be active, involved and to participate in his or her learning process as facilitated by the coach (Moen & Kvalsund, 2008). The aim is to explore the case in focus from many different perspectives, so that the coachee becomes aware of his or her relationship to this case and the potential for growth and learning in the situation. Another important competency for coaches is the ability to facilitate learning and results.

**Learning Culture**

Learning culture is a concept that reflects organisational behaviour from the perspective of learning and development (Watkins & Marsick, 1997). Watkins and Marsick developed their theory of organisational learning which defines seven dimensions that are important in promoting ongoing change and learning in a culture (Marsick & Watkins, 2003). These seven dimensions occur at four different levels in a culture and are measured by the dimensions of learning organisation questionnaire (DLOQ). The first level targets the individual and aims to encourage individuals to engage in dialogue and inquiry. It also attempts to create continuous
learning opportunities for the individuals in the culture. Next the model targets teams by encouraging collaboration and team learning. Thirdly, it aims to help the culture by creating systems to capture and share learning and empower people toward a collective vision. Lastly, this model works at a global level to provide strategic leadership for learning and to connect the culture to its environment. A study conducted by Yang, Watkins, and Marsick (2004) showed that learning activities at the individual, team, and group level indirectly but significantly affect the outcomes for a culture. Yang, Watkins, and Marsick (2004) and Watkins, Selden, and Marsick (1997) both found the learning dimensions to influence knowledge and financial performance in organisations in business. Thus, when creating an environment for continuous learning and transformation it is important that there is a culture characterized by (1) leaders that embody and model learning, (2) people that feel empowered to work toward a common goal, systems that help to capture and share learning, and that there is a strong connection between the cultures itself, the individuals, and the environment (Watkins, Milton, & Kurz 2008).

Coaching and Learning Culture

Coaching invites the coachee to explore the potential for growth and development by the help of the coach. The process builds upon the fact that learning is stimulated, and coaching should therefore stimulate the development of a learning culture (Clutterbuck & Meggison, 2005; Clutterbuck, 2007). Thus, the central element in coaching is to achieve growth and learning, and research confirms that coaching can be an effective tool to improve the performances of others (Evers, Brouwers & Tomic, 2006; Grant, 2009; Green, Grant & Rynsaardt, 2007; Green, Oades & Grant, 2006; Moen, 2010; Moen & Skaalvik, 2009; Moen & Skaalvik, 2008; Spence, Cavanagh & Grant, 2008; Spence & Grant, 2007). Interestingly, studies that investigate the interpersonal dynamics between the coach and the athlete in sport have received little attention, and researchers have demanded that more attention must be paid to coach-athlete relationship issues (Jones, et al., 2004; Jowett, 2003; Lavoi, 2002; Taylor & Wilson, 2005; Olympou, et al., 2008). Thus, there is a growing need for knowledge on the interpersonal dynamics between the coach and the athlete in sport (Poczwardowski, Barott & Jowett, 2006). One purpose of this study was to measure athletes’ perceptions of their coaches’ coaching competencies (CCS) and investigate how these perceptions relate to their experiences regarding a learning culture measured by the DLOQ. A second purpose was to investigate how the dimensions of CCS were related to the overall DLOQ. Finally, the third purpose was to investigate how the dimensions of CCS were related to the separate dimensions of the DLOQ.

Method

Participants in the present study were 269 high school athletes who voluntarily participated in an online questionnaire that measured psychological variables concerning their thoughts, feelings, and actions within sport at their schools. They were all students at different high schools for sports in the middle Norway region. The athletes were from 16 to 20 years old, with a mean of 17 years. The athletes were competing in sports such as football, volleyball, handball, ice hockey, biathlon, cross country skiing, ski jumping, nordic combined, alpine skiing, ice skating, shooting, orienteering, track and field, and bicycling.

The Coach Competence Scale

Based on the International Coaching...
Federation (ICF) core competencies, a validation study examining coach competencies (Auerbach, 2005), and a theoretical review of the coaching process and needed skills (Moen & Kvalsund, 2008), a Coaching Competence Scale (CCS) was developed (Moen & Federici, 2012). The CCS consists of five dimensions with different three numbers of items on each subscale. The dimensions are: (1) Creating the relationship, (2) Communication-attending skills, (3) Communication- influencing skills, (4) Making the responsibility clear, and (5) Facilitating for learning and results. It is important to note that the instrument primarily was designed to measure the coachee’s perception of a coach’s competencies based on his or her experiences from a coaching relationship. Responses on both measurements were given on a 7-point scale ranging from “Not at all” (1) to “Absolutely” (7).

Creating the relationship has a Cronbach’s alpha of .87. An example of an item is: “My coach expresses a fundamental trust and respect in me”. The second dimension focused on communication-attending skills. This dimension has a Cronbach’s alpha of .90. An example of item is: “My coach seems to understand me well when we speak together”. Communication- influencing skills has a Cronbach’s alpha of .88. An example of item is: “My coach asks mainly open and direct questions”. Making the responsibility clear has a Cronbach’s alpha of .88. An example of an item is: “My coach puts a clear responsible on me in my learning process”. The last dimension was Facilitating for learning and results. This dimension has a Cronbach’s alpha of .87. An example of item is: “My coach brings out my solutions on challenges that I meet”.

The Learning Culture

The dimensions of learning organisation questionnaire (DLOQ) were designed to measure important dimensions of a learning culture in organizations (Watkins & Marsick, 1997). There are seven dimensions of the learning organization (Marsick & Watkins, 1999; Watkins & Marsick, 1993, 1996) that form the basis of the DLOQ: 1) Create continuous learning opportunities. Learning is designed into work so that people can learn on the job; opportunities are provided for ongoing education and growth. This dimension has a Cronbach’s alpha of .81 and an example of item is: “In my training group challenges are looked at as possibilities to learn even more.” 2) Promote inquiry and dialogue. People gain productive reasoning skills to express their views and the capacity to listen and inquire into the views of others; the culture is changed to support questioning, feedback, and experimentation. An example of item is: “Athletes in my training group are open and honest in their feedback.” This dimension has a Cronbach’s alpha of .82. 3) Encourage collaboration and team learning. Work is designed to use groups to access different modes of thinking; groups are expected to learn together and work together; collaboration is valued by the culture and rewarded. This dimension has a Cronbach’s alpha of .81. An example of item is: “In my training group both athletes and teams are rewarded for good results.” 4) Create systems to capture and share learning. Both high- and low-technology systems to share learning are created and integrated with work; access is provided; systems are maintained. An example of item is: “In my training group dialogue is preferred on a daily basis.” This dimension has a Cronbach’s alpha of .80. 5) Empower people toward a collective vision. People are involved in setting, owning, and implementing a joint vision; responsibility is distributed close to decision making so that people are motivated to learn toward what they
are held accountable to do. This dimension has a Cronbach’s alpha of .82 and an example of item is: “In my training group athletes who dare to take risks are rewarded.” 6) Connect the organization to its environment. This dimension is not relevant for the participants in this study, and was therefore not included in the present version of the questionnaire. 7) Provide strategic leadership for learning. Leaders model, champion, and support learning; leadership uses learning strategically for business results. This dimension has a Cronbach’s alpha of .86 and an example of item is: “In my training group all decisions are made based on the team’s vision.”

Data Analysis

Relations between perceived coach competencies (CCS) and learning culture (DLOQ) was investigated by means of multiple regression analyses. Before the analyses were conducted, sum scales reflecting the dimensions of CCS and DLOQ were computed (see Instruments) by adding the scores for each respondent. In addition, sum scales were computed for the CCS and DLOQ. The instruments and dimensions has been confirmed and validated in previous studies (Marsick & Watkins, 2003; Moen & Federici, 2011, 2012; Watkins & Marsick, 2003). It is important to note that we preferably should have conducted exploratory or confirmatory factor analyses of the dimensions proposed by theory and previous empirical research. However, the sample does not meet the minimum requirements for conducting such analyses (Pallant, 2010; Gall, Gall & Borg, 2007).

Results

Table 1 shows correlations between the study variables as well as number of items, statistical means, standard deviations, and Cronbach’s alpha. The zero order correlations between the study variables vary from moderate to strong. The matrix reveals that the correlations are strongest between the variables that constitutes the CCS and DLOQ respectively. The correlation between overall CCS and DLOQ is moderate/strong. All variables have satisfactory reliability measured as Cronbach’s alpha.

We employed multiple regression analysis to further investigate the relation between the CCS and DLOQ. Moreover, we also explored whether the different dimensions of the CCS would relate differently to DLOQ. The results from the multiple regression analyses are presented in Table 2.

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As expected, the result of the first analysis yielded the same coefficient as the correlation matrix and shows that perceived coach competencies (CCS) positively predicts learning culture (DLOQ). The CCS accounts for approximately 34% of the variation in DLOQ. The second analysis reveals that only two of the five dimensions constituting the CCS are significant related to the DLOQ, namely making the responsibility clear and creating the relationship. In the second analysis CCS accounts for approximately 38% of the variation in DLOQ, an increase of 4%.

Based on these results, we further wanted to investigate how the dimensions of CCS were related to the separate dimensions of the DLOQ. The results are presented in Table 3.

The results reveal that the dimension making the responsibility clear significantly predicts all the dimensions of learning culture except two, namely inquiry and dialogue and capture and share learning. The dimension inquiry and dialogue is significant predicted by creating the relationship. Moreover, the analyses indicate that the CCS is strongest related to the dimension of collaboration and team learning, accounting for approximately 41% of the variation. The CCS is not significant related to the dimension capture and share learning.

Discussion

The first purpose of this study was to investigate if student athletes perceived coaching competencies (CCS) among Norwegian sport coaches was a predictor for a learning culture (DLOQ). The results in this study show that the CCS positive predicts the DLOQ at the p<.000 level, and that the CCS explains 34% of the variation in the DLOQ. The second purpose of this study was to investigate what dimension(s) of the CCS that predicts the DLOQ. The results in this study show that two of the dimensions of the CCS are significantly related to the overall DLOQ, as creating the relationship and making the responsibility clear accounts for 38% of the variation in the DLOQ. The third purpose of this study was to investigate what dimension(s) of the DLOQ that is predicted by the different dimensions of the CCS. The results in this study show that the dimension making the responsibility clear significantly predicts all the dimensions of the DLOQ at the p<.000 level, except the capture and share learning and inquiry and dialogue. The dimension communication attending skills significantly predicts inquiry and dialogue, and collaboration and team learning at the p<.05 level. The dimension facilitating

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for learning and results significantly predicts collaboration and team learning, and strategic leadership for learning at the p<.05 level. The dimension creating the relationship significantly predicts collaboration and team learning at the p<.000 level. The dimension collaboration and team learning has the strongest relation with the CCS amongst all the different dimensions that construct the DLOQ, accounting for 41% of the variation. The central element in coaching as it is defined by the coaching profession, is to stimulate others to achieve growth and development through goal oriented conversations that is focusing on trustful and respectful behavior, by extensively using powerful questioning followed by active listening (Moen, 2010). It is claimed that it is the relationship which is created during the conversation between the coach and the athlete, which generates learning and results (Grant, 2006). Thus, both practicians and theoreticians claim that coaching is a new route to achieve growth and learning among others, and that the process is focusing on important relational issues (Grant, 2009; Moen, 2010). The Coaching Competence Scale (CCS) was developed to measure important core competencies as defined by the coaching profession (Moen & Federici, 2012). A learning culture is defined by seven different dimensions that are important in promoting on-going change and learning in a culture (Marsick & Watkins, 2003). Since coaching builds upon the fact that learning is supposed to be stimulated, one should expect that the CCS predict the DLOQ. Interestingly, this study indicates that coaches’ coaching competencies in sports, measured by the CCS, is a predictor for the learning culture inside the team (DLOQ). This is an important finding which supports the claim from the coaching profession that coaching is one route to achieve growth and learning by focusing on relational issues. To our knowledge, no studies have earlier investigated possible relationships between coaching and learning culture as defined by the DLOQ. This result is therefore worth noting.

Further, the results indicate that coaching competencies is the strongest predictor for collaboration and team learning with regards to a learning culture. A possible explanation regarding this result is that the coaching relationship is defined as a mutual relationship between the coach and the athlete, which means that sharing different modes of thinking through collaboration is essential in the process (Moen, 2010). Thus, high levels of coaching competencies should stimulate collaboration and team learning. Interestingly, capture and share learning is the only dimension of the DLOQ that is not predicted by the CCS. Coaching is based on sharing perspectives through a mutual endeavour from the coach and the coachee, and one should expect that coaching competencies should be a predictor of this dimension as well. An examination of the items that represents this dimension reveals that the items are focusing on the system the culture has established to ensure that knowledge is captured and shared among the participants in the culture. A possible explanation for this result could be that coaching competencies and systems to ensure capture and share learning are two separate areas that not necessarily relate to each other. This is interesting, because the result indicates that it might be important to have a system and have the ability to use coaching competencies inside a culture. This should be investigated in future research.

Interestingly, the result in this study indicate that making the responsibility clear is the strongest predictor of the DLOQ through the dimensions continuous learning, collaboration and team learning.
learning, collective vision, and strategic leadership for learning. This relationship is significant at the p< .001 level regarding all these dimensions. A possible explanation might be that taking responsibility is essential in order to achieve anything in life. If an athlete do not take responsibility, growth and learning will be impossible to achieve. This is a simple fact. Coaching is based upon the principle that raised awareness is a prerequisite in order to be able to take responsibility in one’s own learning (Whitmore, 2002). This result is therefore important, because it indicates that making the responsibility clear is a strong predictor for a learning culture.

The second strongest predictor of the DLOQ is the CCS dimension creating the relationship. The dimension creating the relationship, predicts the DLOQ through the dimensions collaboration and team learning and inquiry and dialogue. This relationship is significant at the p< .001 level regarding both dimensions. This result indicates that trust and respect are important in order to establish a learning culture. The result might indicate that trustful and respectful behavior is a necessity to make people work together and collaborate. This is in accordance with research within humanistic psychology which claims that trust and respect are key factors in order to establish successful relationships (Ivey, et al., 2012). Further, in order to achieve an effective dialogue with others, trust and respect seem to be essential.

The potential relation between coaching competence and growth and learning will benefit from further research. The present study contributes to coaching research in sports and extends the literature of empirical research regarding this matter. However, the present study has several limitations. Sample size may have influenced the results. Studies with larger number of participants are therefore called for in future research. Moreover, one should note that the collected data is constituted by self-reporting measures and one do not know to which extent these self-reports accurately reflect the variables under study. Conducting studies that combine self-reported data with data obtained in a more objective manner could further develop the line of research. For instance, by longitudinal studies that incorporates both quantitative and qualitative methods.
References


Acknowledgements

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APPRECIATIVE LEADERSHIP AND OPPORTUNITY - CENTRIC APPROACHES TO ORGANIZATION SUCCESS

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ABSTRACT
All humans, in some way, have a need to feel useful and to achieve a sense of significance in their lives. People have a need for respect and approval, as well as a need to influence others. Appreciative Leaders empower others because they have great faith in them and their untapped potential and ability. Empowerment strengthens an individual’s belief in his/her potential and is primary to organization efficiency and effectiveness. Appreciative Leaders are encouraging, highlighting the best in all associates, seeking to illuminate their abilities and strengths, with concurrent focus on developing these capabilities and actualizing their maximum potential.

What do employees really want at work? This question was posed by Sand, Cangemi, and Ingram (2010) and the most cited response was “full appreciation of work done.” The response to this survey and others asking similar questions points the way to the subject of this article: Appreciative Leadership.

The concept of Appreciative Leadership

Moore, Cangemi, and Ingram
Russian Academy of Sciences – he was the first editor of the Organization Development Journal, serving from 1983 to 1988.

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flows from Cooperrider’s *Appreciative Inquiry*, which was defined as “a search for the best in people and their organizations” (Bloom & Martin, 2002). *Appreciative Inquiry* and *Appreciative Leadership* nourish associates’ needs for growth, for adequacy, for reaching and using higher levels of potential—what Abraham Maslow (1970) and Carl Rogers (1971) called self-actualization.

*Appreciative Inquiry* assumes inquiry and the resultant dialogue generate positive, free-flowing, organization-building ideas that illuminate what is positive about an organization’s successes, values, strengths, and aspirations (Whitney, Trosten-Bloom & Rader, 2010; Sandborn, 2006). It is a concept that moves away from the traditional inquiry of *what’s wrong* with an organization and instead focuses on *what’s right* with the organization—an “opportunity-centric” approach as coined by Boyd and Bright (2007). Such a divergence in inquiry is a *paradigm shift*. It is an approach that brings forward the positive in organizational behavior; a focus on successes and not failures (Cangemi, Burga, Lazarus, Miller, & Fitzgerald, 2008; Jones, Lyrintzis, & Kastens, 2010; Mrishra & Bhatnagar, 2012; Clossey, Mehnert, & Silva, 2011). See Table 1.

<table>
<thead>
<tr>
<th>Appreciative Leadership is a strength-based approach focusing on positive ideas and behaviors about people and work. For example:</th>
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<tr>
<td>• Some things are working well. Call them “best practices” and reward them and the positive realities the group supports.</td>
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<tr>
<td>• Discern the most motivating behaviors on the part of leadership and use them to strengthen employee confidence. Result: A more confident workforce.</td>
</tr>
<tr>
<td>• Employees have creative potential which should be given expression; they also want their voices/suggestions/ideas heard. <em>Appreciative Leadership</em> gives them this opportunity.</td>
</tr>
<tr>
<td>• Feeling needed, special, valued, important, and proud of one’s work/group is a human need. <em>Appreciative Leaders</em> find appropriate ways to satisfy this need.</td>
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**Shifting The Focus**

*Appreciative Inquiry* does not seek to ignore organizational problems; it merely shifts the *focus*
from searching for the negative to searching for the positive. It is accomplished by asking questions that bring out an organization’s positive strengths. According to Cooperrider and Srivastva (1987) it is made up essentially of four dimensions:

- **Discovering** the best of what is
- The **ideals** of what might be
- The **consent** of what should be
- **Experiencing** what can be

In reality it asks: How good can the organization become when it is at its best (Bloom & Martin, 2002)? When leaders become aware of specific behaviors associated with the organization’s success, recognizing these behaviors—especially praising them—simply increases the likelihood these behaviors will re-appear, will re-occur (Weiten, Lloyd, Dunn, & Hammer, 2006). As B.F. Skinner pointed out (Nye, 1979) behaviors rewarded in some way tend to be repeated, behaviors ignored generally become extinguished—they disappear. Through Appreciative Leadership, a culture of positive performance and continuous improvement is created. According to Whitney, Troster-Bloom, and Rader (2010), it “sets in motion positive ripples of confidence, energy, enthusiasm and performance” (p. 42).

Appreciative Leaders are encouraging, highlighting the best in all associates, seeking to illuminate their abilities and strengths, with concurrent focus on developing these capabilities and actualizing their maximum potential (Bloom & Martin, 2002). They seek to harness the power of all associates. In a recent survey, 9 out of 10 individuals stated they would be more productive if they were surrounded by positive associates. Yet, 65% of the respondents stated they received no praise for good performance in an entire year (Lorenz, 2006). In another survey, 95% of respondents stated they left their jobs because of lack of appreciation (Sandborn, p. 62). These examples demonstrate the need for Appreciative Inquiry and Appreciative Leadership.

**Imagine An Army of Lions**

Using one’s imagination, ponder the following storyline regarding the potential of Appreciative Leadership: Philip of Macedonia (Father of Alexander The Great) declared, “An army of deer led by a lion is more to be feared than an army of lions led by a deer. An army of lions led by a lion is to be feared most of all, for it is unstoppable” (Sandborn, p. 7)! If one assumes the lion in charge is an Appreciative Leadership lion, and the subordinate lions are products of Appreciative Inquiry, it is not too difficult to envision the powerful force of lions awaiting the leader’s word to take action. Now imagine this same scenario with human beings in an organization where Appreciative Inquiry is the modus operandi of an Appreciative Leader. When associates at all levels are encouraged to question, to try, to think, to “keep on keeping on” with their positive behavior, moving themselves and the organization to higher levels of accomplishment and productivity, we have examples of Appreciative Leadership. These leaders have a healthy effect on others in the organization and have a mental picture of what the organization can become (Maslow, 1998).

Appreciative Leaders themselves enjoy enhanced self-esteem because their leadership encourages employees to know, feel, and understand they are vital to the organization’s success. It recognizes no human beings can function well without some form of positive recognition (Hollister, 1991) and understand employees get frustrated when they are denied opportunities to express their competence, strengths, and potential. They also know employees need to feel they are making a
difference for their team and organization, and it is up to their leaders to help them feel that way. "Appreciative Leadership" embraces harmony among all groups in the organization, assuring members their ideas will be heard and their opinions considered. It encourages associates to look for the best—"best practices" in themselves and others, thus inspiring them to continue learning and growing. It embraces the possible by focusing on behaviors essential for positive movements, greater productivity, new ways of "seeing things," out-of-the-box thinking, and bringing to fruition the potential the organization has to offer. It is the capacity to "see the best" and capitalize on it. The strengths of an organization provide the foundation for its future success.

**Born Leaders?**

No one is born an Appreciative Leader. As stated earlier, it is a skill that is learned. An Appreciative Leader believes associates want the best for the organization and want to contribute to its future for greater success.

**Appreciative Leaders** know building up employees’ self-esteem and confidence at every level in the organization has great value; they enjoy and are comfortable complimenting employees for well-done performance and encourage them to continue their positive behaviors; they realize most people want more than a monetary reward for their efforts—most desire a *psychic paycheck* such as earned praise, an encouraging gesture (thank you cards, notes, name in company periodical, etc.), and similar rewarding leadership behaviors.

**Appreciative Leaders** know rewarding *effort* and *improvement* perhaps is more important than just recognizing goal attainment.

**Appreciative Leaders** care about employees in their time of need and understand their feelings. **Appreciative Leaders** have the potential to enhance *employee engagement*, which Wollard and Shuck (2011) defined as “an individual-employee’s cognitive, emotional, and behavioral state directed toward desirable organizational outcomes” (p. 429). In short, they know most employees want to do good work and will strive to achieve beyond expectation. *This list is not to be considered all-inclusive, but only an example of the beliefs and attitudes of an Appreciative Leader.*

**The Search For Significance**

All humans, in some way, have a need to *feel useful* and *to achieve a sense of significance* in their lives. (Lombardi, 1975). People have a need for respect and approval, as well as a need to influence others (Maslow, 1970, p.45). Appreciative Leaders empower others because they have great faith in them and their untapped potential and ability (Maxwell, 2007). Empowerment strengthens an individual’s belief in his/her sense of effectiveness, encourages the individual to reach his/her potential and is primary to organization efficiency and effectiveness.

**CONCLUSION**

In sum, Appreciative Leadership is a style utilizing *Appreciative Inquiry* (Cooperrider, D., Sorensen, P., Yeager, T., & Whitney, D. (2005) which zeros in on “what’s right” in the organization and capitalizes on it by rewarding behaviors that release their potential and assure they will be repeated. The focus is on “what’s right” as opposed to “what’s wrong.” Problems in the organization are not ignored. They simply are not the subject of focus. The belief is, those behaviors rewarded (focused on) tend to be repeated. Those behaviors on which there is limited or no focus tend to disappear. Leaders who practice Appreciative Leadership should hear many associates saying “TGIM”—
Thank God It’s Monday (Cangemi & Miller, 2005)! Academic researchers should find the focus of this article, Appreciative Leadership, a potential fountain of possibilities for further research. Others, already in the field, who are seeking ideas to assist them in moving their organizations to greater success should, at the very least, be inspired to give this more positive approach serious consideration.

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Abstract

Many nonprofit organizations are facing enormous pressures produced by an eroding funding base coupled with increased demand for their services. Furthermore, both scholars and practitioners have predicted an acute leadership shortage in the sector will start to unravel in the not too distant future. Others have warned of an impending “brain drain” throughout the sector once the global economy begins to demonstrate a sustained recovery. Conventional wisdom might suggest that organization development (OD) is well-positioned to assist nonprofits with these and other critical challenges. This paper takes a contrarian view by advocating that nonprofit leaders avoid engaging OD consulting services at this time, and if they have already done so, to exercise extreme caution in order to minimize or eliminate potential negative effects OD consultants can have on their organizations’ effectiveness.

Good morning and welcome to this year’s Nonprofit Leadership Summit. I was quite surprised and very gratified when asked to deliver the Summit’s Keynote Address this year. I was surprised because
solutions to any of these complex and thorny problems. However, based on my 40 years in the field of OD, research conducted in that field by others and myself, and my opinions gleaned from this experience and research, I want to offer some guidelines and ideas for you to consider when wrestling with any of challenges I mentioned that your nonprofit is facing or will face in the near future. These ideas and guidelines all point to my main piece of unsolicited advice: Do not fall prey to claims that nonprofits and OD go well together (Kahnweiler, 2011; Wirtenberg, et al., 2007) Do not engage the services of an OD consultant to assist you with one or more of these challenges. And should you have already engaged the services of an OD consultant, I will offer ideas on how to best minimize the damage inflicted upon your organization as a result of this decision.

Reasons to not Engage an OD Consultant

I could easily offer you 25 reasons to not engage an OD consultant to assist with your challenges. In the interest of time, I will limit my remarks to what could be termed “The top five reasons nonprofit leaders should not engage an OD consultant.” You may have your own reasons, none of which would correspond to any of my top five (or even my 25). In that case, you would still achieve the ultimate goal for which I am advocating.

Reason 1: it is going to be expensive. In some ways, OD consulting is like many other purchases in that you often get what you pay for. Thus, if the consultant is highly skilled, competent, and wise, that will cost you some major bucks. Conversely, if the consultant tries to convince you that they are highly skilled, competent, and wise, you do not necessarily believe that but hire them because their fees are much lower than others who
have proposed their wares to you, you will still ultimately pay some major bucks because shoddy OD work will cost you much in wasted time, lost productivity, and greater inefficiencies. It is always also possible that you and your organization will find you have more problems as a result of bad OD than if you did not hire the consultant in the first place. Problems cost you money. Are any of you sitting on more funds than you know how to use?

Reason 2: it is going to take longer than you think. One of the hallmarks of OD is that the real problem to be addressed by the client and consultant is rarely if ever the problem as presented by the client to the consultant initially (Block, 1998). And in the vast majority of cases with which I have at least some passing familiarity, the real problem is more complicated and more difficult to detect much less resolve compared to the initial presenting problem. It takes a conceptual baby step to then conclude that the more complicated and elusive the problem, the longer the consultant is going to hang around your organization trying to help with the problem.

In addition, it is an unquestioned given in OD that there be sufficient trust in the consultant-client relationship in order for OD to succeed (Cummins & Worley, 2009). When was the last time you trusted someone before you started working with them, or even after a brief period of time spent with them? Establishing trust takes time. Most consultants, in OD and otherwise, will include a list of references with their proposal so that you can contact them and ask about the quality of the consultant’s work. Do you think a consultant is going to give you references that were dissatisfied with them and/or their work? And even if they did, would you then want to engage this person? If they used such poor judgment giving you negative references, what might they do once they are inside your organization mucking around with this and that? In sum, trust takes time to emerge in relationships, including ones with OD consultants.

How many of you have had your homes undergo a fairly or significantly major renovation? OK, keep your hands up, please. Now, keep your hands raised if you ended up paying the contractor less for their work than what was in their proposal? Hmm…look around the room, folks. How many hands do you see raised? I see none. OK, those who had their hands up before please raise them again. Now, keep your hands raised if the contractor finished all the work to your satisfaction before their original estimate of how long the project would take to complete? How many hands do you see raised? I see none again. Need I say more?

Reason 3: there are no guarantees with OD work. While all of you live with a certain degree of risk in your professional capacities every hour of every day, who among us would not want to manage those risks, or at least some of them, if we could? OD work, by its nature, is fuzzy, unpredictable, and fraught with risks, many of which cannot even be imagined until some time after the work has begun. Thus, the outcomes of an OD project can not and should not be guaranteed, especially at the outset of the project and at the proposal stage as well. If an OD consultant guarantees the outcome of their work before or during a project, be highly skeptical. I would even go as far as to say do not offer them any work at all; if you have competitors, let the consultant who offers guarantees work with them. You and your nonprofit will be thankful for it.

Reason 4: things may get worse before they get better. I have found this dynamic to hold true in my own OD work and I am certainly far from unique among the OD consultants out there. Consider this modification of the old, worn-out cliché, “No pain, no gain.” “Not enough pain, no change.” OD is

Kahnweiler
in the change business; it is at the heart of what OD is all about (Brown, 2011). Often an organization can think it is in sufficient pain to undergo a needed change, only to discover the forces that restrict change are stronger than those designed to foster it. In simple terms, the organization is not ready to change yet because it is not hurting enough yet. I will just pose this question: Does your organization, and you as its top leader, want things to get worse than they already are? It likely will happen even with the most thoughtful and well-intentioned agenda for change.

Reason 5: measuring the real impact of OD validly is both elusive and illusive. Suppose you have hired a consultant, worked with them on defining the real problem, you both agree that the organization’s readiness for change is apparent, you have communicated clearly and thoroughly with staff, the board, volunteers, and other stakeholders about the project and its rationale, you achieve buy-in from all parties, the work commences, the work continues, and everyone (or at least most everyone) feels good about how the work is progressing. Then you (or your board or staff or major donor or someone else) asks, “Aside from ‘feel good’ measures, how can we know what real results we have achieved so far?” That is a wonderful and legitimate question. The dilemma is that it does not have a satisfactory answer. As nonprofit leaders, you deal with difficult-to-validly-measure outcomes all the time. How can you truly know what impact your services have? Sure, you can put numbers on anything, but how valid are those numbers (Collins, 2005)? The same holds true for OD work. Do you want yet one more “can’t really know the results for sure” on your plate?

To summarize, OD, and that includes good OD, will cost you time and money. It will entail risks that even the most experienced and talented consultants can not anticipate at the outset. It will also be virtually impossible to gauge if and to what degree the OD work affected your organization and it will likely need to get worse in your organization, not better, before any positive effects of OD even have a chance to materialize. How appealing does the engagement of an OD consultant look and sound to you now?

Now suppose you ignore all the pearls of ignorance that I have shared thus far and decide to go ahead and engage an OD consultant for some type of work. What pitfalls, unanticipated glitches, snags, and other undesirable outcomes should you expect? As with the previous list, I could offer you so many and will stick to just a few that seem to be commonplace in OD.

The introduction of an outsider (in this case, the OD consultant) affects your organization in some ways and it is difficult if not impossible to know for certain what those effects might be ahead of time (Schein, 2010). Of course, both consultants and clients alike would love that these effects, each and every one of them, be positive. However, it is unlikely, at least initially, that this will be the case. Adjustments will have to be made by all the groups of people with which the consultant interacts. Think about an established group with which you were a member, whether it be work-related or not. It could even be a group from your childhood such as a class in school or a sports team. Suppose a new person, an outsider, then joins the group. As welcoming and inclusive as the group may have acted towards the newcomer, did not the dynamics of the group change somewhat, at least initially? Everyone in the group has had shared experiences with one another, possibly for quite some time, and then a stranger becomes part of the group. It can thus be expected that some degree of change, stress, chaos, and unpredictability will be now be
Lastly, and certainly not least, I do not mean to be insulting when I say this, for it may seem so obvious and thus needless to say, but I will say it anyway. Other “stuff” is going to happen in your organization’s life during the period of time when the OD work is taking place. Another way of saying this is that organizations do not exist for the convenience of OD, OD consultants, and OD projects. Some of this other “stuff” may be very important, troublesome, time-consuming, two of these three, or all three. This may require postponing the OD work, cancelling it, or trying to find ways to have it continue while “the other stuff” is dealt with in one way or another. Regardless, it means more is piled onto your already overflowing plate as well as your staffs’ full plates. And if you decide to postpone or cancel the OD work, consider what you have already invested in it. Will you be OK that any return on that investment will be miniscule if not non-existent?

In sum, I am making the case that once OD consulting starts to occur in your organization, expect challenges of various sorts. More time, more money, more frustration, more stress, more uncertainty, and more ambiguity are likely to emerge, and your life as a leader will become more complicated and difficult before it gets better and easier.

Are any of you still thinking seriously about launching OD in your nonprofit? Let me quickly offer some additional red flags for your consideration.

**What Else Could I Possibly Worry About?**

**Incompetence:** For decades, OD has struggled with its own identity (Vaill, 2005). Part of this struggle entails who should be allowed to practice OD, who decides this, and how is it decided? While good work has been performed to address these issues, OD professionals have yet to agree or reach consensus on these matters. The truth is that OD does
who are incompetent. Many have advanced degrees, attended prestigious universities, published a good bit, and are seen as deep experts by others. There is, then, some pressure that we feel to live up to these attributes, and that pressure may manifest itself with our use of complex models, excessively large words, high-up-in-the-stratosphere theories, and graphics with lots of circles, triangles, boxes, arrows, dotted lines, straight lines, and other elements that would give the sharpest among us headaches just looking at them much less trying to comprehend them. If your consultant seems too smart for your own good, ask them to explain themselves in ways a 6th grader would understand. I bet some may not be able to do so.

Leveraging their presumed advantage to your detriment: this can occur in all kinds of ways. I will limit my remarks to but three here. 1) When we utilize the services of specialists, we always run the risk of being dependent on them, for they know so much more than we ever will in their areas of expertise. I cannot give you a formula that reveals when such dependence becomes unhealthy to both parties; I can say it does happen, even when the consultant takes precautions to avoid unhealthy and dysfunctional dependence (despite the financial gain involved). I can say it does happen because I have been guilty of it myself, and likely more times than I care to admit or realize. 2) Many in our craft were trained to be on the lookout for resistance on the part of clients and to then confront them. This can be particularly the case when, for example, you decide to delay a part of a project or decrease the budget devoted to it. I am not saying any of you can not handle an accusation of being a resistant client. Just expect it. 3) Lastly, be wary of claims that the consultant’s methods are “research-based” or that their approaches have stood the test of empirical scrutiny. Why? Because there is little

Over-promising results: be wary of an OD consultant who tries to impress you by committing to specific results expressed in a confident tone. It is just not possible to know the precise outcomes of OD work before it gets started, and sometimes even after it has begun. There are just too many variables that enter into the equation, and many of these aren’t even known with any degree of certainty until they become exposed.

Pushing to be a strategic partner with you: much has been studied and written about the changing role of human resources, OD, and related fields in the last couple of decades (Guo et al., 2011; Kahnweiler & Kahnweiler, 2005; Parry et al., 2005). In essence, it boils down to these “people-related fields” being considered a strategic (i.e., mission-critical) role rather than a nice-to-have, and one requirement for that to occur is that the HR or OD specialist “partner” with leadership. That means more of your valuable time, energy, and resources will need to be devoted to “partnering,” which means less of your time, energy, and resources will be able to be devoted to other pressing matters. Being seen as a strategic partner certainly has payoffs to the OD or HR specialist. But what do you get out of being a strategic partner that is desirable for you?

Dazzling with you with their brilliance: I have no doubt that OD consultants are, on the whole, very bright. This probably is true even with those who are incompetent. Many have advanced degrees, attended prestigious universities, published a good bit, and are seen as deep experts by others. There is, then, some pressure that we feel to live up to these attributes, and that pressure may manifest itself with our use of complex models, excessively large words, high-up-in-the-stratosphere theories, and graphics with lots of circles, triangles, boxes, arrows, dotted lines, straight lines, and other elements that would give the sharpest among us headaches just looking at them much less trying to comprehend them. If your consultant seems too smart for your own good, ask them to explain themselves in ways a 6th grader would understand. I bet some may not be able to do so.

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that is the case for some of you, let me clue you in on something. If you haven’t been listening that closely, please listen now and listen carefully. Employ the same skepticism I have in this speech. Why? Because I do not completely believe every word I said, and I urge you to do likewise. Thank you!

References


Concluding Remarks

I hope that I have given at least some of you some food for thought. Moreover, I hope that whether you are contemplating using the services of an OD consultant or have already decided to engage one that I have provided some ideas that will lead you to “proceed with caution.” There is much that can go wrong, even when you have found the best-intentioned, squeaky clean ethical, highly skilled, and profoundly experienced OD consultant who by all measures appears to be an excellent fit with what you need from them.

It may strike some of you as odd, peculiar, even incredulous that someone like me, who has devoted most of his working life of four decades to OD, to deliver a keynote address (keeping in mind I was “Plan G” or further into the alphabet) expounding on the hazards, pitfalls, and slippery slope of the OD and OD consulting territory. If


Organizational Development Dilemmas in Nonprofit Organizations in Difficult Economic Time

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Abstract

Despite the growing body of literature highlighting the uniqueness of nonprofit organizations, there is still a need for distinct professional knowledge about Organizational Development (OD) in this sector. This article attempts to address this gap by discussing key dilemmas faced by OD practitioners in the nonprofit sector in these times of world-wide economic recession: resource scarcity impediments to OD processes; OD practitioner over-involvement in the daily management of nonprofit organizations; OD practitioner ideological over-identification with client organizations. Finally, this article discusses implications for OD researchers and practitioners.

Keywords: organizational development dilemmas, nonprofit organizations, economic recession

Researchers and practitioners acquainted with substantial literature in the field of OD do not often come across publications about OD in the nonprofit sector. On one hand, there is a growing body of literature highlighting the uniqueness of the nonprofit organizations (Anheier, 2005; Collins, 2008; Drucker, 2006; Frumkin, 2002). On the other hand, “scant attention has been
paid to the particular considerations, nuances, challenges, and opportunities pertaining to OD in the nonprofit sector” (Kahnweiler, 2011, p. 81). Such knowledge is of particular importance currently, as the worldwide recession has resulted in a greater social need for the nonprofit sector, also known as the Third Sector. This sector, however, is not immune to the implications of these troubling economic times, as nonprofit organizations (NPOs) are particularly fragile to the dramatic decrease in funds from donors and government. The challenges currently faced by NPOs influence not only the scope and character of their routine activities, but also their needs, and accordingly, they influence OD processes and interventions within them. Thus, the purpose of this paper is to address this gap in the literature by offering three key OD challenges in the nonprofit sector in difficult economic times, and discussing their implications for practitioners.

These challenges include: resource scarcity impediments to OD processes; OD practitioner over-involvement in the daily management of nonprofit organizations; OD practitioner ideological over-identification with client organizations.

**Dilemmas of Resource Scarcity: Impediments to OD Processes**

OD practitioners unfamiliar with the Third Sector often picture it as relatively free of financial concerns. As, by definition, there is no aim for profit, the assumption is that there is no need to worry about or deal with monetary issues. Drucker (1989, 2006) stresses the exact opposite: NPOs are highly concerned with finance exactly because they cannot pursue their ideological and social missions without external support. They are not self-sustained, but highly dependent on funding from external sources such as foundations, philanthropists and government. Cost-effectiveness considerations have also led in recent years to greater partnerships between the Third Sector and the other two sectors: private and the public. Kahnweiler (2011, p. 84) highlights the following paradox: while NPOs’ financial resources have become scarcer due to decreased funding, “the worldwide recession has resulted in more people needing more services delivered by NPOs than ever before”. Many NPOs’ missions entail long-standing and complex problems. These missions require long-term funding, which is usually rare. Thus, many NPOs have become accustomed to planning and improvising along the way. The same pattern also may be apparent in OD efforts, as I shall describe.

Resource scarcity usually has a negative effect on the timeframe and scope of OD processes and interventions in NPOs. Naturally, OD is always limited by resources in all three sectors. In the Third Sector, however, OD interventions are particularly fragile as they are so dependent on external funding. Examples of such consequences follow.

- As NPOs sometimes struggle for their survival, OD interventions might be perceived as luxury which is among the first things given up, in order to use the resources for other ends. The paradox is that NPOs in crisis are in the greatest need for the assistance of OD professionals.
- The time allocated to the process of organizational diagnosis might be far shorter than necessary to be thorough and maintain professional standards.
- Interventions chosen might be too general, as more specific interventions are more expensive in the sense of cost-effectiveness. For example, organizational or team level interventions may be
more common in NPOs as they involve more staff members than tailor-made interventions in the personal or interpersonal level.

In my discussions with nonprofit organization leaders it appears that many OD practitioners find themselves in the start or in the middle of an organizational diagnosis or intervention without resources to continue as contracted and planned. Their clients may be mentally committed to the consulting process but cannot continue to pay. Other clients might pressure OD practitioners into handing in their diagnosis report faster and based on less data and analysis. This haste might also serve various organizational needs, such as satisfying the requests or easing the concerns of interested parties, including board members, philanthropists and others who wish to understand the state of the organization as soon as possible.

In my discussions with OD practitioners it seems that OD dilemmas caused by resource scarcity in the nonprofit sector are not at all unusual currently. Although few OD practitioners solve such problems by volunteering themselves (e.g., continuing their consulting work in client NPOs pro-bono), this certainly cannot be the solution for the OD practice on the whole. How, then, should OD practitioners in the Third Sector deal with impediments caused by resource scarcity? This dilemma is yet to be the focus of future inquiry.

While resource scarcity is an impediment to OD interventions, as described, another dilemma arises: OD practitioners face the dilemma of being overly involved in NPO daily management—not as external change agents, but rather as substitutes for key position holders within the NPO. Interestingly, while resource scarcity tends to cut short OD processes in NPOs, client pressure to be overly involved in NPO daily management causes OD practitioners to function in the opposite manner.

The Dilemma of Over-Involvement in NPO Daily Management

Two issues will be discussed regarding the dilemma of OD practitioners’ over-involvement in daily management of NPOs: contracting OD practitioners to function as temporary substitutes for NPOs in periods they are without executives, as well as OD practitioners’ expert mode interventions in volunteer management.

OD Practitioners as Substitutes for NPOs’ Executives

Executive leadership is a critical component in the success of nonprofit organizations (Froelich, McKee, & Rathge, 2011), however, nonprofit organizations experience extremely high turnover rates at the executive director level (Adams, 1998; Clark & Clark, 1994; Wolfred, 1999). Various reasons have been given for this finding, including the substantial numbers of baby boomers who reach retirement age (Froelich et al., 2011). With nonprofit organizations growing in both size and number, an impending leadership deficit is a concern (Citrin, & Ogden, 2010). Given this menace to NPOs’ stability, it is surprising that executive succession planning has been relatively neglected by the Third Sector (Bowen, 1994; Froelich et al., 2011; Santora & Sarros, 2001). High turnover rates at the executive director level, as well as the lack of executive succession planning, have several problematic consequences for OD practice.

The first consequence is the invitation of external OD practitioners to temporarily fill various managerial gaps in NPOs. Needless to say, functioning as an external OD change agent is quite different, and sometimes even contrary
to, functioning as an organizational insider, especially while replacing top executives. In the circumstances of extremely high turnover rates at the executive director level and lack of succession planning, OD practitioners are sometimes suddenly requested—in the midst of their intervention as an external change agent—to enhance the scope of their involvement in the organization in order to compensate for placeholders who have left.

In addition, some external OD practitioners are contracted in advance, usually by the board of directors, to function as temporary substitutes until a new CEO is hired. This can be explained by OD practitioners’ reputation as experts in management and in organizational processes, as well as the temporary nature of contracting an OD practitioner—which both fit NPOs’ temporary need for managerial substitution. As nonprofit governance continues to suffer from unclear conceptions of the division of labor between board of directors and executive directors (Marx & Davis, 2012), contracting OD practitioners to substitute for CEOs may be a convenient quick fix for NPOs in the short run. The dilemma, however, is that this practice has little to do with the genuine essence of OD.

The second consequence of high turnover rates at the executive director level and lack of executive succession planning is client pressure that OD practitioners provide quick bottom line results. As an NPO without a CEO is in a fragile position, this pressure for results usually stems from board members’ eagerness for change that would supposedly secure organizational survival in difficult financial times. Another reason for this pressure may be the wish of board members and other interested parties, such as donors, to achieve various desired organizational changes before the entrance of a new CEO. The latter would naturally need time to get acquainted with the organization, and may not see eye to eye with the board as to the necessary changes. The external OD practitioner, however, who is contracted in advance for a certain intervention, is perceived more easily by clients as someone who could provide desired bottom line results.

An example follows based on a colleague’s experience as an OD practitioner: the board of directors of an NPO asked the OD practitioner to manage the organization for two months until a new CEO would step in. It was stressed that during this short period the consultant was expected to find and hire three new staff members—key position holders in the organization, as well as define a new organizational strategy. The new CEO was expected by the board simply to step into the organization after these fundamental changes had been quickly established by someone else.

While client-pressure for bottom line results is common in OD interventions in all three sectors, it carries more weight in the nonprofit sector due to its unique characteristics, including resource scarcity, ideological agendas, social missions, etc. When OD practitioners meet pressure for quick bottom line results in the business sector, they can more easily cope as the entire setting of their intervention is enmeshed in a profit-oriented system. Demanding bottom line results, however, in the Third Sector might contradict the ideological nature of NPOs as well as the core values of OD. Nirenberg (2012, p. 9) states that “pressure for bottom line results has effectively strangled the ability of OD to focus on humanizing the workplace or attending to conditions amenable to employee self–actualization.” While Nirenberg’s claim is not specific to the Third Sector, it seems especially complex there.

Client pressure for bottom line results in NPOs provokes yet another challenge for OD
practitioners—measuring these results as manifested in the performance and in the social impact of NPOs. Schweigert (2006) links between the present climate of public accountability and the increasing demand to show “what works” and what is gained from social investments. This increasing demand for accountability leads not only to pressure on OD practitioners to produce bottom line results, but it also leads to pressure to demonstrate them well by using measures fit for the Third Sector.

This may be a complex challenge for OD practitioners, as they do not necessarily engage in evaluation and assessment of NPOs’ social impact—an expertise in and of itself. In recent years, researchers and consultants have been using various measures (Martin & Kettner, 2009). These include frameworks such as Cost-benefit Analysis, Social Return on Investment (Gibson, Jones, Travers, & Hunter, 2011), and Empowerment Evaluation (Miller & Campbell, 2006). Despite the advancement in this field, quantitative measures are still controversial and often infeasible (Avolio, Avey, & Quisenberry, 2010). It appears that there is still some confusion as to the various uses and methods of evaluation of NPOs. Schweigert’s (2006) review of evaluation reports and literature revealed three different meanings of effectiveness in use: increased understanding, accountability, and demonstrating causal linkages. Accordingly, the pressure to produce bottom line results in the Third Sector comes with a territory which should be better understood by OD practitioners.

**OD Expert Mode in Volunteer Management**

The second issue relevant to the dilemma of over-involvement in the daily management of NPOs is OD practitioners’ expert mode of addressing volunteer management. On the whole, the Third Sector is greatly dependent on the use of volunteer (unpaid) labor. Some NPOs could not even exist without volunteer labor (Drucker, 1989, 2006). This phenomenon, which is a unique characteristic of the Third Sector, has important implications for the practice of OD.

OD practitioners are often called by NPOs to assist staff with volunteer management. The vast literature on volunteer management manifests not only the importance and relevance of this topic in NPOs, but it also testifies to its great complexity and sensitivity (Lee & Catagnus, 1999; Noble, Rogers, & Fryar, 2003; Scheier, 2003; Wilson, 2000). It clearly appears from the literature that handling the work of volunteers is remarkably different from managing paid employees in the public or private sectors (Pearce, 1993). Likewise, the relationships formed between supervisors and their subordinates in business or government settings are different in their very nature and character from the delicate staff-volunteer relations in NPOs.

Paid NPO staff members inexperienced with volunteer management tend to treat volunteers as paid employees, thus causing certain misunderstanding and tensions. For example, a staff member may ask a volunteer to finish tasks quickly for the sake of greater outputs, while the volunteer may be taking her time as she enjoys her contacts with community members she meets on her weekly voluntary shift. Constant conflicts with her supervisor over working pace might decrease the volunteer’s motivation to continue her engagement with this NPO. Meanwhile, staff members eager to finish organizational tasks promptly might feel frustration and anger. This episode is not trivial, as such incidents causes long term consequences: Over time, as tensions re-occur between managers and volunteers over a broad spectrum of organizational issues, volunteers leave, thus...
decreasing the overall function and stability of the organization which is so dependent on their labor.

OD practitioners often choose the mode of giving expert advice on typical volunteer management issues, such as the following:

- Defining who is a volunteer and who is not (Cnaan, Handy & Wadsworth, 1996);
- Measuring performance and commitment among volunteers (Chinman & Wandersman, 1999; Clary, Synder, & Stukas, 1996; Cnaan & Cascio, 1999);
- Understanding multiple motivations of volunteers (Willems, Huybrechts, Jegers, Vantilborgh, Bidee, & Pepermans, 2012);
- Retiring volunteers when their service is no longer required or suitable to the NPO needs (Cook, 1992).

As Schein (1999) noted, the expert mode in OD is usually rewarding for both clients and practitioners. Surely, there are times when it is most helpful to give information relevant to a client’s problem, however, the consultant must consider the assumptions underlying the expert mode and assess the multiple consequences. For example, the expert mode assumes that the client knows what the problem is and that the client has communicated the real problem to the consultant. Not only that, but the expert mode might put the organization and its members in a position contrary to that of the expert consultant—as lacking knowledge and skills. This, of course, opposes at least two OD core values: client ownership of organizational problems and client empowerment achieved by solving problems jointly with the consultant.

As volunteer management is a key issue in NPOs, OD practice in the Third Sector should take into consideration its implications. It is fair to estimate that NPOs’ dependency on volunteer labor would only loom larger currently and in the near future, when resources are scarce and it is harder than ever to hire paid staff. I offer the following implication for OD practitioners. In order to assist NPOs, OD practitioners should not only be knowledgeable about volunteer management, but they should also find ways to broaden the capacity of NPOs’ staff for self-learning and empowerment in the key issue of volunteer management. In other words, consulting in the expert mode may assist the NPO in the short-run while neglecting building necessary skills inside the organization. This implication is especially important in times of resource scarcity, when NPOs should become more self-sustained in order not only to survive but succeed as well.

**The Dilemma of OD Practitioner Emotional and Ideological Over-Identification**

There appears to be a solid alignment of core values between OD and NPOs (Lanfranchi, Narcy, & Larguem, 2010, in Kahnweiler, 2011). While this alignment can assist the OD intervention, it can also strengthen OD practitioners’ emotional over-identification with client NPO. This emotional stance becomes a dilemma as it might interfere with the professional practice of OD.

How does this alignment evolve? NPOs are ideology-driven from their inception. They are typically founded by a zealous group of concerned citizens aiming to make a marked difference in society. Sometimes they succeed against all odds. As the organization grows, certain organizational issues become complex and then external professional assistance is required. When in need of an OD practitioner, board members or senior executives usually seek an OD consultant whose reputation is favorable not only in professional
terms but also in terms of ideological and political affiliations and values. Client NPOs usually inquire OD agents about their ideological stance in the early stages of contracting, therefore, it is safe to assume that many NPOs hire consultants supportive of their organizational ideology and values to begin with. As the OD process progresses, and as client-consultant relations tighten, OD practitioners may grow even fonder of their clients. They can also become more appreciative of the clients’ organizational mission, values and ideology. The path to over-identification of OD practitioners with their client NPOs is short.

This scenario can be more evident in troubling economic times. In the first place, the resource scarcity described above encourages NPOs to look for pro-bono OD, which is more frequent when OD practitioners are supportive of their client organizations’ ideology to begin with. In addition, OD practitioners develop over identification as they closely witness their client NPO’s struggles in economic storms. Even experienced OD professionals find it hard to remain emotionally serene when their client organization—which contributes to social greater good—copes with menaces to its survival. Devoted staff members are fired for lack of resources; volunteers leave as they themselves need to work more to make ends meet; donors can no longer support the NPO, etc.

OD practitioners’ increased emotional identification leads to blurring of barriers between them and their client organization. Thus, their professional distinctiveness is at risk. Although this challenge is inherent in the work of any OD practitioner, it is far more acute in the Third Sector due to the characteristics described. Consulting pro-bono, as mentioned, usually accelerates the pace of this process as it puts tremendous pressure on OD practitioners to be more and more present and involved in the everyday life of the NPO—as no formal boundaries of time and pay are there to limit their involvement. This blurs both the identity and role perception of OD practitioners.

Implications for OD Research and Practice

“…Nonprofits must address the economic and sustainability challenges that ultimately will change the way they the way they do business in order to ensure their survival. Nonprofits in 2020 will need to place an even greater emphasis on entrepreneurial ventures and social marketing; rely less on public money and more on collaboration between all three sectors; share responsibilities and funding resources within a new framework of intergovernmental cooperation; and place more responsibility on their boards and other external stakeholders to engage in fund development roles and responsibilities” (Mesch, 2010, p. S173).

The three OD dilemmas described are not only complex by themselves, but they also interact with and affect one another. For example, OD over-involvement in the daily management of a client NPO can easily strengthen ideological over-identification with the client, and vice versa. Similarly, it was claimed that resource scarcity is often linked with the tendency to become overly involved in NPOs as temporary insiders rather than external change agents. Likewise, OD practitioners may choose the mode of giving expert advice when facing client pressure for bottom line results. The above citation of Mesch (2010) stresses the need to deepen OD expertise in the Third Sector, as the changes and
Organizations face a variety of challenges that can make it difficult to sustain their position in the near future. Accordingly, OD practitioners must adapt to meet these challenges. I agree with Kahnweiler’s (2011) claim that the current economic downturn has created many opportunities for OD knowledge and skills to be applied as NPOs struggle with decreased resources and various challenges. It is emphasized, however, that in order to effectively assist NPOs, OD practitioners should deepen their understanding not only of the unique organizational characteristics of NPOs, but also of OD professional dilemmas encountered in the Third Sector. This echoes the claim made by Levasseur (2010) regarding the need for a new form of OD. As research of OD in the Third Sector is still currently evolving, I hope this article has called some attention to the importance of gaining more relevant knowledge and insights.

References


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Through their missions of service and advocacy, nonprofit human services organizations, function on an ideology that is centralized on creating change for the individual, community, region, nation, or world. Nonprofit agencies find themselves in increasingly competitive environments; functioning with limited, often decreasing, resources; and increasing demands for services; all while being held to ever growing standards of accountability. For many nonprofits, providing services and securing resources are their top two priorities. Organizational development efforts that build the organization’s capacity, improve internal systems management, and develop staff are often deferred or limited. This article explores a sampling of issues relevant to providing organizational development in nonprofit human services organizations, to serve as a primer for those considering providing organizational development services in this setting.

Organizational development (OD) practices and nonprofit human services practices are founded on planned change that is based on strong humanitarian and democratic philosophies in which individuals are regarded with an inherent value and dignity (Fishman, 1984; Resnick & Menefee, 1993). The practitioners in both fields utilize a client-practitioner relationship wherein the “practitioner
is primarily responsible to the client, the client-practitioner relationship is of primary importance as a vehicle for change, and commitment to privacy and confidentiality must be kept” (Resnick & Menefee, 1993, p.434-435). The fields also draw from a large base of shared theoretical foundations including psychological, psychoanalytical, sociology, learning, systems, and group dynamics theories among others (Resnick & Menefee, 1993).

These shared ideologies between the OD and human services profession present an opportunity for organizational development professionals to partner with nonprofit human services organizations to build the effectiveness and efficiency of these organizations (Fishman, 1984; Resnick & Menefee, 1993). Fishman (1984) argued that “since one important goals of the human services network is to provide efficient and effective intervention, intervention that facilitates constructive behavioral and emotional change, it would seem that the network would be an enthusiastic consumer of applied behavioral programs” (p.5). Such a partnership could help meet a critical need for human services, their clients, and communities, as nonprofit human services organizations are increasingly under pressure to produce measurable outcomes with rapidly diminishing resources in increasingly competitive environments (Frumkin & Andre-Clark, 2000). However, relatively few nonprofit human services organizations utilize the expertise of OD professionals and those who do often fail to fully engage in the planned intervention processes (Fishman, 1984, Hyde, 2003, 2004; Norman & Keys, 1992; Resnick & Menefee, 1993; Stevenson, Florin, Mills, & Andrade, 2002).

**Purpose**

Over the last thirty years scholars have written about the potential impact organizational development practices could have in the field of human services. Resnick and Manefee (1993) maintained that “OD is a set of technologies that, if competently applied, can transform an organization’s culture from one focused on maintenance and survival to one concerned with growth and success” (p.441). However, the success of OD interventions in human services organizations relies on the OD practitioner having adequate knowledge about this genre of organizations and the organization itself being ready and prepared for this type of change. In a small national study, White (1998) found that 33% of the practitioners they surveyed who had experience working with nonprofits, self-reported inadequacies in their professional preparation for this work. Additionally, 35% of their clients reported being ill prepared for the OD intervention (p. 52).

The purpose of this paper is to act as a primer for organizational development practitioners who are interested in utilizing their expertise to support planned change interventions in nonprofit human services organizations. The intent is to help organizational development practitioners consider some of the distinguishing features of nonprofit human services and the impact these factors may have on their OD practices. Human services organizations perform a large number of client services that are part of a “highly articulated, complex service delivery systems” that include such services as housing, education, physical and mental health, workforce development, child welfare, and senior services (Fishman, 1984, p. 5). This paper focuses specifically on private nonprofit human services organizations. While most of the factors discussed in this paper would be salient in public nonprofit organizations, public nonprofit human services organizations are often subject
One of the primary differences between OD and human services, is human services commitment to the “disadvantaged” (Resnick & Menefee, 1993). Nonprofit human services organizations are often accurately referred to as value laden. This is because these agencies are founded on a cultural of ethical imperative (Fishman, 1984). Frumkin and Andre-Clark (2000) describe these organizations as “driven by commitments to justice and charity” and warn that “many nonprofit organizations are consciously oriented away from finding the shortest distance between two points” (p. 151). In fact, values are probably the most potent tools that an OD professional can tap in working with human services providers, and that in turn these providers can tap to “distinguish their service from that of for-profit companies” (Frumkin & Andre-Clark, 2000, p. 144). Organizational values are a key part of understanding the motives and emotions of clients and workers at human services organizations (Taber, 1987). The organizational values and the ideology they are based on are corner stones of the nonprofit human services organization.

Ideological clashes within the organization and among its stakeholders can be highly controversial in nature (Fishman, 1984). However, when there is a shared ideology centered on human services to clients, the organization can tap these shared values for direction and motivation for the change process (Nybell & Gray, 2004). Unfortunately, a unified mission and set of values is not a given for a nonprofit human services organization. This disconnect sometimes referred to as mission creep by practitioners, can be the result of a wide range of factors. A lack of unified mission (or an ill-defined mission), a compelling

Literature review

Several scholars have highlighted the need for OD interventions in human services organizations to focus on transformative or second order change (Bess, Perkins, & McCown, 2011; Evans, Prilleltensky, McKenzie, Prilleltensky, Nogueras, & Huggins, 2011; Hyde, 2003). Bess et al. (2011) define transformational change as “involving a qualitative change in the structural or cultural systems of an organization that requires the development of new cognitive schemas among members for understanding the organizational setting or context in relationship to its purpose or mission” (p. 36). Hyde (2004) warns that one of the primary issues with OD in human services organizations is a reliance on short term incrementally focused interventions, often relying on “‘canned’ approach rather than tailoring interventions to the agency” (p. 11). Evans et al. (2011) frames the contrast not in terms of the change to the organizational system, but in terms of a change in the organizations approach to providing human services. They describe an ameliorative approach as providing care and services “to individuals that have already been afflicted by some psychological, physical or social ailment” (p. 51). In contrast to a transformative approach to human services which “suggests a role for human services organization in promoting community, equality, and solidarity” (p. 51). This type requires a longer more holistic engagement with the client to create the conditions required for change, to define the problem, targets, and actions necessary for change (Evans et al., 2011, p. 51).
unmet tangential need, combined with a beacon (leadership, funding source, influential stakeholder) result in incremental movement away from the original intended mission. This is different than the conscious evolution of a mission, as mission creep results in a muddied, potentially conflicting, set of values for the organizations. Bess et al. (2011) suggest that “organizations that did not have in place ongoing practices of inquiry and reflection also lacked a cohesive organizational identity in which values and commitment were shared” (p. 46).

Sandfort’s (2005) case study of Casa de Esperanza demonstrates the importance of a unified mission and the consequences of mission creep. The organization in this example was created to provide shelter and support to Latina women, finds that there is a pressing need to provide shelter for a diverse population of women. This pressing need, in combination with regulations from funders created a situation where the organization is operating under two separate missions (one official, one unofficial), with camps of stakeholders highly invested in the different missions and goals of the organization. For organizations such as Casa de Esperanza, the alignment of mission and values is the planned intervention. However, mission and value alignment is an essential crux for any activity in nonprofit organizations, including strategic planning, diversity initiatives, and other planned change efforts (Edwards & Eadie, 1994; Hyde, 2003).

Organizational dynamics

Most nonprofit human services organizations operate in an unrelenting state of crisis (Austin & Hasenfield, 1985; Hopkins & Hyde, 2002). Practitioners struggle to meet the challenges created by dwindling resources, increasing competition (from both nonprofit and for-profit organizations), and a growing demand for their services (Evans et al., 2011). Practitioners describe the resulting dynamics as “chaotic and stressful” stating such things as “Most of the time, I don’t think that I or my staff knows if we are coming or going” (Hyde, 2003, p. 9).

The very chaos that indicates a strong need for OD intervention is also one of the strongest obstacles to successful OD (Hyde, 2004). Hyde (2004) found that out of the 20 human services practitioners she interviewed, 75% of their organizations had recently experienced downsizing. The result of which was increased staff anxiety over job security and staff who were stressed, overloaded, and lacked security in their jobs (Hyde, 2004). She concluded that “‘When an agency is fighting for fiscal survival it’s difficult to undertake another controversial or demanding change like diversity’” (Hyde, 2004, p. 10). Golensky and Walker (2003) describe agencies and their staffs’ efforts to balance such issues as access, accountability, quality, and fiscal viability as a juggling act. It is important for OD practitioners to recognize that from the perspective of the human services practitioners, “the bulk of their organizations’ resources—time and money, principally—are already committed to ongoing programs and operations” (Edwards & Eadie, 1994, p. 111). As such, human services organizations “must be highly selective” in choosing where to invest the scarce resources they have remaining for OD efforts (Edwards & Eadie, 1994, p. 111).

The challenge of managing and securing the limited resources the organization relies on can consume the entire focus of human services leadership “leave little energy for guiding or inspiring a change process” (Evans et al., 2011, p. 51). This creates a system where human services organizations value action over reflection and short-term efficiency over long-term effectiveness (Bess et al., 2011; Norman & Keys, 1992). Dimock (1987) found that even in
studies with human services organizations where they were able to gather and present relevant and timely data, “there was often little action planning undertaken” (p. 366). Additionally, when OD initiative are taken by human services organizations often the onus for change is placed on the worker, without supporting change in the organization (Hyde, 2003; Nybell & Gray, 2004). Dimock (1987) describes the inertia created by the chaotic system as the organizations “resistance to change” and suggests that this is one of the most challenging hurdles for OD practitioners to overcome when working with human services organizations (p. 366).

Leadership

Hopkins and Hyde (2002) in their study of 115 managers in 115 human services agencies conclude that “the very nature of human services agencies… makes them difficult to manage, let alone change… in particular the overwhelming nature of the environmental crises may result in a withdrawal to intra-agency dynamics that seem easier to control” (Hopkins & Hyde, 2002, p. 12). Human services managers often lack the expertise necessary to manage organizational change (Frumkin & Andre-Clark, 2000). This situation is exasperated by poor compensation packages and a lack of resources for ongoing development/training (Frumkin & Andre-Clark, 2000; Hopkins & Hyde, 2002). Managers face increasing demands for services, staff burnout and poor morale, lack of staff and technological expertise, increasing calls for accountability, and uncertain external climates (Golensky & Walker, 2003; Hopkins & Hyde, 2002). “The primary concerns among managers appeared to be related to resource development and organizational climate, and the solutions included staff development, resource development through fundraising and grant writing, staff recruitment, and some
a management role, and where such a transition can
damage the organization’s reputations and result
in a loss of resources (Golensky & Walker, 2003).

**Legitimacy and Accountability**

“Change is rendered even more difficult
in human services organizations because they are
highly dependent on their external environment
for legitimacy and resources, making them highly
permeable to environmental influences” (Bargal &
Schmid, 1992, p. 2). Nonprofits are rarely reliant
on their clients for funding, instead they rely on
a “complex interdependent network of funding
sources” (Austin & Hasenfield, 1985, p. 359). They
rely on a similarly complex network of specialized
service and professional organizations, and external
political connections, to establish their legitimacy,
resulting in a negotiated role between internal
and external sources for control of the service
delivery process (Austin & Hasenfield, 1985).

Nonprofits continuously experience
tremendous pressure from these political,
regulatory, and funding sources to demonstrate
effectiveness through documented outcomes
(Frumkin & Andre-Clark, 2000). Yet many of the
benefits of human services remain intangible with
“a value that cannot readily be measured using
marketplace mechanisms” (Austin & Hasenfield,
1985). The result is a system that is more likely to
be shaped by a political process than by objective
outcome measures (Austin & Hansenfield, 1985).

Most nonprofit human services organizations are
relatively small and local, and do not have the
resources, knowledge, or conditions necessary
for full scale evaluations (Stevenson et al., 2002).
There are also serious ethical considerations for
evaluation that would include exclusion of qualified
individuals through control groups or other
similar design (Dimock, 1978). Private funders
are becoming increasingly aware for their part of
organizations limited ability to self-evaluate their
programs and services (Stevenson et al., 2002).
There is even some questioning regarding the push
for increasing efficiency and outcome measures and
if they are in fact benefiting nonprofit organizations
and their clients (Frumkin & Andre-Clark, 2000).

One way organizations attempt to improve
their outcomes and meet the increasingly higher
expectations of them is to adopt best practices from
other organizations (Manela & Moxley, 2002).
“As the interest and expectations of regulatory
and funding bodies and professional and consumer
groups stimulate dialogue about what constitutes
best practices, these practices are becoming more
visible within many human services organizations”
(Manela & Moxley, 2002, p. 2). As a result,
regulating bodies that the organization relies on
for legitimacy or financial support, often require
specific adoption of best practices that may or
may not meet the needs of the organization or its
clients. “If best practices are seen as standardized
and inflexible, agencies may try to implement
them with absolute fidelity to their original design
and not shape them to fit specific situations. This
can limit the utility of best practices and keep
them from serving an agency’s organizational
purposes” (Manela & Moxley, 2002, p. 4).

**Discussion**

The reality described in the literature
and experienced by nonprofit human services
professionals is a complex chaotic network of threats
to the organization, its values, and its clients. These
threats include a wide range of environmental issues
such as changing political priorities, competing
human services organizations (including for profit
and public organizations), increased demand for
continue to not only survive but to provide high quality complex and responsive client services (Hopkins & Hyde, 2002). Any action that increases the perceived threat to the organization or that reduces the power and control of the organization is likely to be received in a highly defensive manner.

Likewise these service providers are keen providers of individualized services. As such they are unlikely to be impressed or to buy into “canned” programs that fail to be sensitive the individual needs of their program. Neither should one expect that complex issues they face can be resolved or even substantially improved by a couple day standalone retreat or staff development project (Hyde, 2004). These are more likely to result in minor if any change for the organization and are likely to reduce buy in of the staff and leadership with future more comprehensive OD interventions.

However, if as Resnick and Manefee (1993) suggest OD interventions can help organizations develop in such a manner that they can successfully “transform an organization’s culture from one focused on maintenance and survival to one concerned with growth and success,” the impact on these organizations, their clients, and our communities would be truly remarkable (p. 441).

OD consultants looking to nonprofit human services for “visionary as opposed to task or problem solving leadership” that is “necessary for organizational transformations”, will need to understand that management may not have the luxury to sacrifice the current crisis if the organizations values or survival of the organization do not allow for it (Hopkins & Hyde, 2002).

If one considers Maslow’s (1943) hierarchy of needs, it is conceivable that many, if not most private nonprofit human services organizations have been unable to succeed in fully addressing the second layer of needs—security. This is not to underestimate the complexity or depth of these programs, for in consideration of the increasingly volatile environment of the last thirty years and grossly reduced resources available, it is an incredible feat that many of these organizations continue to not only survive but to provide high quality complex and responsive client services (Hopkins & Hyde, 2002). Any action that increases the perceived threat to the organization or that reduces the power and control of the organization is likely to be received in a highly defensive manner.

Likewise these service providers are keen providers of individualized services. As such they are unlikely to be impressed or to buy into “canned” programs that fail to be sensitive the individual needs of their program. Neither should one expect that complex issues they face can be resolved or even substantially improved by a couple day standalone retreat or staff development project (Hyde, 2004). These are more likely to result in minor if any change for the organization and are likely to reduce buy in of the staff and leadership with future more comprehensive OD interventions. However, if as Resnick and Manefee (1993) suggest OD interventions can help organizations develop in such a manner that they can successfully “transform an organization’s culture from one focused on maintenance and survival to one concerned with growth and success,” the impact on these organizations, their clients, and our communities would be truly remarkable (p. 441).
References


Abstract

This paper reviews perceptions on male and female leaders in educational and corporate environments, aiming to enhance awareness about these perceptions and, consequently, balancing them. The study was conducted among workforce members in the Los Angeles area who were also MBA students. The term androgynous leader is presented in the literature review and verified as an essential leadership trend in contemporary times. The androgynous trend is further solidified through the areas in which the study participants felt that male and female leaders should improve. The data confirmed that both genders should adopt traits from one another in order to become androgynous leaders.

The Problem Definition and Discussion

In the context of business, the importance of leadership remains a critical topic for consideration. Several studies have evaluated the role of women leaders in the corporate sector (Rosener, 1990; Valentine and Godkin, 2000) finding that to rise to more senior positions, one must first be seen to have served as a leader or, at the very least, have potential to be a leader. Mitroussi and Mitroussi, 2009 explored female leaders within the educational
sector, finding that perceptions of what represents an exceptional leader are commonly based on a variety of factors including, but not limited to, leadership style, culture, and/or politics. Leadership and gender—specifically female leadership within the corporate and academic settings—have been a curiosity amongst a number of scholars (Srand, 1999; Moskal, 1997; Rozier, 1996). A theoretical evaluation of gender and leadership (Appelbaum, Audet, & Miller, 2003) noted, “To prosper, let alone survive, organizations must excel at both planning and execution: they must be nimble, visionary and get maximum benefit from their resources—all of their resources, including human resources and including women. By failing to maximize the benefit of their female employees, organizations lose in two ways... unique talent and perspective...” (p. 43).

While diversity is generally seen as a value held by organizations, the term is often referenced by race and culture. Diversity within education—specifically within the classroom, is steadily gaining more attention. Training the leaders of tomorrow necessitates understanding our students of today. As such, the questions at hand and the focus of this article are as follows: What are the perceptions of male leaders vs. female leaders? Is how one markets themselves as a strong leader different for males vs. females? Do students prefer male leaders vs. female leaders in the classroom?

Defining Gender, Leadership and Androgyny

In this paper, the authors use the term gender to refer to the psychosocial implications of being male or female, such as beliefs and expectations about what kinds of attitudes, values, skills, and behaviors are more appropriate for, or typical of, one sex than the other (Powell, 2011; Archer & Lloyd, 2002; Lippa, 2005). The term leader is defined as a person in a formally designated leadership position (Butterfield and Grinnell, 1999). Androgyny is a word made up of two Greek roots. “Andro” means male; whereas, “gyn” means female. Androgyny is the state or condition of having a high degree of both feminine and masculine traits. Under these circumstances, human beings have loosely defined impulses and are free to express non-traditional values (Woodhill & Samuals, 2004; Guastello & Guastello, 2003).

Women Leadership within Industry

In 2010, women accounted for 50.9% of the population and 47.1% of the labor force (Department of Labor, 2010; Census, 2010a) but as shown in previous studies (Appelbaum, et al, 2003) female representation at more senior corporate levels remain negligible by comparison: the largest percentage of employed women (40.6%) worked in management, professional, and related occupations; 32.0% worked in sales and office occupations; 21.3% in service occupations; 5.2% in production, transportation, and material moving occupations; and 0.9% in natural resources, construction, and maintenance occupations. Furthermore, the number of women in the labor force increased 107% between 1973 and 2010 (Powell, 2012), while women are projected to account for 51% of the increase in total labor force growth between 2008 and 2018 (US Department of Labor, 2011).

Women make up 16% of board directors in Fortune 500 companies (catalyst, 2010), 13% of board directors in FTSE100 companies (consisting of the 100 most highly capitalized United kingdom companies listed on the London Stock Exchange), and approximately 10% of board of directors in
the largest companies listed on the national stock exchange of European Union member states (Powell, 2012; European Commission, 2007).

As illustrated in Table 1, the historical trends between 2009 and 2011 display a slightly positive percentage increase in highest ranking corporate officer and board of director positions, while the top earner decreased by 0.1% between 2009 and 2011. From a corporate standpoint, women continue to maintain a somewhat tokened representation within the Fortune 500 companies, holding a staggering 3.6% of Fortune 500 CEO roles and 3.5% of Fortune 1000 roles (Catalyst 2012).

<table>
<thead>
<tr>
<th>Table 1</th>
<th>Historical trends highest ranking corporate officers between 2009-2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>Position</td>
<td>Percentage point increase</td>
</tr>
<tr>
<td>F500 board of directors</td>
<td>+1.7</td>
</tr>
<tr>
<td>Executive Officer Positions</td>
<td>-0.9</td>
</tr>
<tr>
<td>F500 Top Earners</td>
<td>-0.1</td>
</tr>
<tr>
<td>Highest Ranking Corporate Officer positions</td>
<td>No change</td>
</tr>
</tbody>
</table>

Source: Catalyst (2010a & b - 2011)

Gender in Education: Student and Professor Representation in the Classroom

Perceptions of strong leadership lend themselves to more male dominated organizations where traditionally men hold a higher proportion of managerial positions. The Association of Advance Collegiate Schools of Business (AACSB) reported that in 2010, women made up 28.4% of all full-time faculty; with 73.3% of those faculty members being classified as White, non-Hispanic. Reported enrollment of female MBA students was 36.8% with 63.8% of all MBA students being classified as White, non-Hispanic. As shown in Table 2, academia, much like the corporate sector, reflects an under representation of women—professors and students.

Reports show, for example, that while in the past 25 years females have speedily increased their share of positions within higher education, following graduation women are still more likely to be unemployed and earn considerably lower wages than their male counterparts (Nuthall, 2008; Mitroussi, 2009; Blackmore, 2002). In their research on female educational leadership in the UK and Greece, Mitroussi (2009) concluded that women are vastly under represented within the higher ranks of academia. Further their research showed that as positions in the academic hierarchy get higher, the percentage of women gets lower. The authors conclude that the percentage of women drops sharply when examining administrative positions and power structures of the university (2009). This is consistent with previous research conducted in the United States, which has shown that despite trends of increased visibility of women within higher ranking positions, female managers have been consistently concentrated in the lower management levels and hold positions with less power and authority than men (Brady, et al., 2011).

Leadership and Gender: Emotion

The proposition that women are better managers because of their emotional abilities has become somewhat of a pervasive assertion that has been explored on varying levels. In a review on gendering emotion in organizations, Jones (2007) asserts that “emotion as a workplace issue has been dragged from the margins into the center-stage, in both the academic and the popular management literature” (p. 81). The author goes on to conclude that whenever we read “emotion” gender is always present, “whether clearly spelled out, erased, or written in the margins” (p. 81). While gender
is generally perceived as an indicator of many things; little research has been done to examine the graduate student perceptions of leadership as it applies to such roles within the classroom. If organizations would be better able to understand when women leaders are most effective, they may be able to increase the numbers of women in the leadership ranks resulting in better organizational performance (Tibus, 2010). Examinations of women leaders tend to focus heavily on charismatic and/or visionary leaders. Specifically, the concentration looks at transformational leadership behaviors of women in senior management positions. Findings have generally shown no notable differences between women and men with regard to transformational leadership behaviors or characteristics, yet consistently support the idea that women are more emotional leaders overall (Eagly and Johnson, 1990; Eagly et al, 2003).

**The androgynous leader**

For women leaders, maintaining a strong and confident stance in the classroom can be somewhat of a juggling act. Although women leaders are often equally experienced and knowledgeable; student reception of this knowledge is, at times, unequal when compared to that of a male leader. When examining these phenomena within the corporate sector, the results are fairly similar: in spite of the underrepresentation of women in top leadership positions, researchers consistently find a positive correlation between the representation of women in leadership positions and business performance measures such as market share and return on investment (Tully, 2007). Although correlation does not always imply causation, there are strong reasons to believe that diversity in leadership has tangible payoffs (Tully, 2007).

Numerous books and articles have examined leadership as it applies to organizational management, yet few have examined androgynous leadership within the classroom. Successful leaders most often have an androgynous balance of traits that includes gregariousness, positive initiative and assertion, social skills, intelligence, conscientiousness, integrity, trustworthiness, and the ability to persuade, inspire, and motivate others (Tully, 2007), meaning that male and female traits are equally important. For the purposes of this article, significance of one gender trait over another is not in question, while the importance of being able to balance these perceived gender traits within the classroom is a point of curiosity. Park (1997) suggested that an “integration rather than a polarization becomes necessary for [male and female] leaders and organizations…that is, an androgynous leadership style can be the most appropriate for achieving high performance in many organizations.” Paris and Decker (2012) examined the perceptions of male business students and stereotypical assumptions held by those students. Specifically the authors wanted to find out if male business students still tend to stereotype the managerial role using a pro-male bias. Findings suggested that students in the business administration program stereotyped the managerial role of men vs. women, to a greater degree than those not enrolled in the business administration program (2012). Kyriakidou (2011) found that studying gender, management and leadership in organizations is significant, as “we do not really leave gender at the door when entering our organizational work lives; rather, we “do” gender in specific ways, some reflexive but most perhaps not.”

**The Study**

To verify the literature reviewed above, the authors of this paper initiated a study in
which 48 analysis units participated. The participants to the study were members of the Los Angeles workforce, who were also enrolled in an MBA program. They varied in age from 25 to 48 years, and had a minimum of 3 years of work experience. There was an equal amount of men and women that participated in this study.

Data Gathering and Analysis

All participants received a sheet with two types of questions:

1. Pertaining to their educational environment:
   a. They were asked whether they considered male or female leaders (in this case educators) more effective and efficient, and were given five criteria to base their selections on. The criteria were: 1. Knowledge transfer; 2. Reliability; 3. Trustworthiness; 4. Comfort level; and 5. General leadership abilities.
   b. In addition, they were invited to share their reasons for the criteria they selected.

2. Pertaining to their own work environment:
   a. They were asked: 1. Who they would rather work for, and why; and 2. Who they worked for longer.
   b. In addition, they were asked to reflect on their experiences and indicate areas in which male leaders and female leaders could improve.

While the data gathering was treated as a survey, which is a quantitative approach, the questions were presented in such a way that participants had to explain their responses and present reasons and themes, which required more intense analysis than mere tabularizing of findings. In their analysis of the data, the authors encountered a wide divergence of reasons listed in the first category (of the educational leaders), as well as in the second category (of the industry related leaders). The authors therefore utilized a qualitative data analysis methodology, also known as the phenomenological approach, which entails a process of clustering terms with similar meaning, also referred to as “phenomenological reduction” and “theme clustering” (Creswell, 1998, 2007; Blodgett-McDeavitt, 1997). In a pure phenomenological study approach, there is usually a small number of analysis units (Creswell recommends between 3 and 15), but the data is rich and therefore yield a wide variety of terms which need to be clustered since many terms have similar meanings. In this study, there were 48 analysis units, and their responses also yielded a broad variety of terms. To ensure similar understanding of the data, both researchers analyzed the data individually at first, and engaged in theme clustering, in order to compare notes later. By utilizing this approach, they aimed at solidifying their study findings through the establishment of inter-rater reliability. The final comparison yielded a similarity in theme formulations of 86.3%, which indicates that inter-rater reliability was indeed established.

Findings

Reflections on educational leaders. In the analysis of the responses to the question if male or female educational leaders were considered better in the following areas, the following findings surfaced (see Table 3 and Figure 1):

<table>
<thead>
<tr>
<th>Areas in which educational leaders are better</th>
<th>male leaders better</th>
<th>female leaders better</th>
<th>no difference</th>
</tr>
</thead>
<tbody>
<tr>
<td>Knowledge transfer</td>
<td>6</td>
<td>10</td>
<td>32</td>
</tr>
<tr>
<td>Reliability</td>
<td>9</td>
<td>13</td>
<td>26</td>
</tr>
<tr>
<td>Trustworthiness</td>
<td>9</td>
<td>8</td>
<td>31</td>
</tr>
<tr>
<td>Comfort level</td>
<td>9</td>
<td>18</td>
<td>21</td>
</tr>
<tr>
<td>General leadership abilities</td>
<td>20</td>
<td>3</td>
<td>25</td>
</tr>
</tbody>
</table>
Adding the votes and dividing them by 5 (the categories) yields an average of 10.6 participants (22.1%) for male educational leaders; an average of 10.4 participant (21.6%) for female educational leaders, and an average of 27 participants (56.3%) for either.

The findings in Table 3 and Figure 1 bring one progressive tendency to the surface: in all areas there was a majority opinion among the participants that there was no difference between female or male educational leaders. The common reason given by this majority was that there could be good and bad leaders in all areas, and that the quality of the leaders’ performance was not so much based on their gender but rather on their characters and personal approaches.

When analyzing the different reasons provided by the participants who selected either male or female educational leaders, the data above indicates that female educators generally scored better in knowledge transfer, reliability and comfort level, while male educators scored better in trustworthiness and general leadership abilities. There were, however, motivations for responses included for all categories. Table 4 provides an overview of the reasons provided.

Since the information above is a clustering of the raw data, one can find contradictions in the lists. For instance, in the category “Trustworthiness,” some participants indicated having lost trust in female leaders several times, while others...
stated that, in their opinions, females were more trustworthy. A deeper analysis of these reasons will not be included at this time, since many of the reasons provided in Table 4 above recurred when the study participants were asked in what areas they felt male and female leaders could improve. Overall, however, the researchers concluded from the responses to this question that male leaders in education were generally seen as more rational, less emotional, and more comfortable in their leadership, while female educational leaders were generally considered to be more nurturing, hence, more caring, but also, more emotional.

**Reflections on leaders in general.**
The first question in this section was, “who would you rather work for?” The findings are presented in Table 5 and Figure 2.

### Table 5
*Who would you rather work for?*

<table>
<thead>
<tr>
<th>Rather work for:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Male leader</td>
<td>38%</td>
</tr>
<tr>
<td>Female leader</td>
<td>8%</td>
</tr>
<tr>
<td>No difference</td>
<td>54%</td>
</tr>
</tbody>
</table>

![Figure 2: Who would you rather work for?](image)

Consistent with their previous responses, a majority of participants (54%) indicated that it made no difference who they worked for. Of those who did specify who they would rather work for, a majority (38%) selected male leaders as their preference, while only 8% selected female leaders. For both categories, there were, however, reasons offered, which are compiled in Table 6 below.

<table>
<thead>
<tr>
<th>Reason for working with a male leader</th>
<th>Reason for working with a female leader</th>
</tr>
</thead>
<tbody>
<tr>
<td>Easier to work with</td>
<td>More empathetic and caring</td>
</tr>
<tr>
<td>Less emotional</td>
<td>Better to relate to for female workers</td>
</tr>
<tr>
<td>Lead more quietly and logically</td>
<td>Easier to get along with</td>
</tr>
<tr>
<td>Less emotional and more rational than females</td>
<td></td>
</tr>
<tr>
<td>More stable sense of business</td>
<td></td>
</tr>
<tr>
<td>Easier to work with for male workers</td>
<td></td>
</tr>
<tr>
<td>More comfortable and simpler in communication</td>
<td></td>
</tr>
<tr>
<td>More direct in goal focus</td>
<td></td>
</tr>
<tr>
<td>More reasonable</td>
<td></td>
</tr>
<tr>
<td>Feel less threatened</td>
<td></td>
</tr>
<tr>
<td>More consistent and straight to the point</td>
<td></td>
</tr>
<tr>
<td>Easier to learn from</td>
<td></td>
</tr>
<tr>
<td>Less complicated</td>
<td></td>
</tr>
</tbody>
</table>

The reasons presented in Table 6 underscore the general impressions presented under Table 4. Male leaders were, again, generally considered to be more rational, less emotional, and more comfortable in their leadership, while female leaders were on average perceived as more caring. As indicated earlier, a more detailed analysis of the themes will be presented later.

Table 7 and Figure 3 present the findings from the question: who did you work for longer? It turned out that more of the participants had worked for male leaders, and did so for a longer time as well.

### Table 7
*Who did you work for longer?*

<table>
<thead>
<tr>
<th>Worked longer for:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Male leaders</td>
<td>58%</td>
</tr>
<tr>
<td>Female leaders</td>
<td>37%</td>
</tr>
<tr>
<td>Evenly</td>
<td>5%</td>
</tr>
</tbody>
</table>

**Way and Marques**
According to Table 7 and Figure 3, 58% of the respondents indicated that they worked longer for a male leader, while 37% worked longer for a female leader. Only 5% submitted that they worked practically evenly for male and female leaders. This data, while seemingly insignificant, may still explain why there is a preference among the participants for male leaders: people have a tendency to prefer what they are most familiar with, just like they have a tendency to shun or reject what they are unfamiliar with. These general tendencies may therefore provide an important indication why the participants expressed a clear preference for working with male leaders.

In the final section of the findings presentation, a presentation and discussion will be included of the clustered areas that surfaced when reviewing the participants’ submissions of areas in which male leaders and female leaders were suggested to improve. At first, the data will be presented in its clustered form: Table 8 and Figure 4 below depict the clustered themes for male leaders to improve on.

When reviewing the multitude of areas that male leaders should presumably improve on according to the participants, there were clear cluster areas. The researchers could ultimately reduce this broad variety of terms to 7. As explained before, the clusters consist of terms with similar implications. For instance, the researchers agreed that terms such as “less sports talk,” “connecting better with people,” “better listening,” and “more caution in making remarks” could all be clustered in the theme “communication,” which, as a term itself, was also most frequently listed. In the cluster “empathy” there were several listings of the word empathy in its literal form, but also other terms such as “relating,” “sensitivity,” “sympathy,” and “not being so unilateral.” For “adaptation,” as a third example, terms such as “flexibility,” “open to diversity,” “not being so micro-managing,” and “open-mindedness” were incorporated.

A similar approach was followed when analyzing the suggestions for female leaders. Table 9 and figure 5 below reveal the clustered themes in which female leaders should improve.
Discussion about the Study Findings

From this study it can be detected that there is a positive trend, at least among the participants in this study, in considering both male and female leaders as equally competent in good leadership. It also became obvious that more of the participants had worked longer and more frequently for male leaders than for female leaders. As mentioned earlier, this may explain why the participants expressed preference in working for male leaders, since this was their area of reference and comfort. Throughout the findings, there were some themes that kept recurring. These themes turned out to be the leading ones in the areas for improvement at the end of the analysis: male leaders were considered in need of communication, empathy, adaptation, connection, trust, patience, and organizing. Six of these seven terms were mainly presented in light of a need for more sensitivity in the approaches of male leaders. Female leaders were labeled exactly the opposite way: throughout the data, it was also conveyed that the participants felt that female leaders had some typical areas in which they needed improvement. These areas were mentioned as setbacks for female educational leaders: gossiping, too emotional, and too focused on proving themselves were some of the recurring examples. In the list of improvements, these themes were listed as controlling their emotions, communication, always proving themselves, as well as prioritizing and job expertise. The way these themes were presented, even in cases where they were listed under the same key words as the male leaders (e.g. communication), consistently indicated a perception that females are seen as too emotional and therefore less professional.

Confirming the androgynous leader. The interesting observation that the researchers made during their analysis of the data is that, in this era
of increased preference for “soft skills,” which are those that entail senses of empathy, nurturing, caring, emotional intelligence and the like, one may wonder whether being emotional should fully be considered an area for improvement, hence a weakness, or rather with moderation? It is generally understandable that one cannot carry all private baggage into the workplace and continuously disrupt the work pace with emotional turbulences, but the time that human beings were mandated to park their souls and emotions at the work door is also behind us. Considering the earlier presented phenomenon “androgyny,” which is the state or condition of having a high degree of both feminine and masculine traits, it seems to the researchers that the best leaders could currently be in the making if the awareness on mutual adoption of traits and skills gets elevated. If such is the case, near future leaders could learn from male as well as female leaders and find a middle path of proper inclusion of all the qualities needed to make workplaces successful yet gratifying at the same time.

Within these preferences, female educators scored better in knowledge transfer, reliability and comfort level, and male educators scored better in trustworthiness and general leadership abilities. When reflecting on their workforce, however, 38% of the participants selected male leaders as their preference, while only 8% selected female leaders. The fact that most of these participants had experiences with male leaders may have attributed to this major difference. Similar to the educational leaders, however, there was a majority of participants, 54%, that indicated having no preference.

Is how one markets themselves as a strong leader different for males vs. females? Based on the areas listed for improvement for male and female leaders, it seems that both groups will have to adopt qualities from one another. Overall, the participants expressed that males should communicate in more caring ways, should have more empathy, should adapt better to change, connect more with employees, be more trustworthy, practice more patience and be better organized, while females should control their emotions, communicate more clearly, resist the urge to always prove themselves, try to prioritize better, enhance their job expertise, be less judgmental, more confident and direct. Based on the authors’ consensus, this data yields useful information in the need for cross-training: male leaders could learn from female leaders how to communicate in more caring ways, have more empathy, connect more with employees, be more trustworthy, practice more patience and be better organized, while female leaders could learn from male leaders how to control their emotions, communicate more clearly, resist the urge to always prove themselves, try to prioritize better, enhance their job expertise, be less judgmental, and be more confident and direct. By doing so, the androgynous

Answering the Focus Questions and Concluding Remarks

At the commencement of this paper, the authors posted three questions, which they will now attempt to answer.

What are the perceptions of male leaders vs. female leaders? A majority of participants in this study felt that there were no differences in male or female educational leaders, because both genders hold equal capabilities of leading well or not. There were, however, still participants who had specific preferences: an average of 22.1% was more impressed by male educational leaders; an average of 21.6% was more impressed by female educational leaders, and an average of 56.3% had no preference.

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leader could become a swift and effective reality.

The only areas in which the genders should join forces toward mutual improvement are adaptation to change (mentioned for male leaders), and openness to diversity (mentioned for female leaders). These last areas have a lot to do with recent trends and are natural challenges for human beings, because they both pertain to changed circumstances.

Do students prefer male leaders vs. female leaders in the classroom? Based on the findings of this study, it can be concluded that there is an increasing balance in perception on male leaders, with better views on female educational leaders than those in other work environments.

Concluding Remarks

The study presented in this paper managed to support the literature review about leadership: while the study did not explore the actual presence of female leaders in higher echelons of corporate and educational institutions, it did examine perceptions on male versus female leadership, and found that the study respondents basically agreed with the need for androgynous leadership as presented in the literature review. This turned out to be the case for both educational and other leaders.

Limitations and Recommendations

The main limitation to this study is the number of participants, which is considered small in quantitative terms, yet very large in qualitative terms. In addition, the population of participants was geographically and educationally skewed: all participants lived and worked in the Los Angeles area and were graduate students. Based on these limitations, the authors recommend future researchers to consider replicating this study with a larger and more dispersed population, in order to find out whether there will be a shift in the findings. Another recommendation for future researchers is to explore ways in which androgynous leadership could best be presented to students, educators, and members of the workforce, since it seems to be a critical element for future leadership success.

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Way and Marques


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- Please use CFP OD Journal in the subject line of your e-mail.

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- When possible, create attractive visuals that aid in supporting your narrative. Note that the visuals will be reproduced in black and white.

- We expect that the contributed papers are the original, never-published works of the author(s) and no copyrights have been violated.
Upcoming Conferences

The International Society for Organization Development (ISOD)
First International Conference, 24th – 27th July 2013; Accra, Ghana
WELCOME! AKWABA! WOEZO! BON ARRIVE!

The International Society for Organization Development (ISOD) will be holding its first international conference in Accra, Ghana from 24th – 27th July 2013. The conference will be jointly hosted by the Organization Capacity Improvement Consultants (OCIC) and the University of Cape Coast (UCC) on the theme OD: A key to development.

Book your flight to arrive in Accra, Ghana on the 23rd July 2013 and enjoy what promises to be a unique OD Conference from the 24th to 27th July 2013. You can fly direct with Delta from New York to Accra; Virgin or British Airlines via London to Accra or KLM/Air France via Amsterdam to Accra, etc.

Context and conference rationale

The global economy in recent times has been confronted with the problem of creating resilient economy and sustainable growth and development. Challenges such as the global financial crisis, Euro zone crisis and hikes in the price of food items have characterized the global economy in recent times. According to the International Monetary Fund (2011), global activity has slowed and productivity needed for sustainable global growth has also stalled1.

Therefore, an increasing call for innovative approaches to manage the global economy for sustainable development in both developed and developing countries. Organisation Development (OD) practitioners and scholars have widely acknowledged the OD approach as an effective tool for addressing these developmental challenges confronting public, private and not-for-profit sectors in the global economy.

The OD approach involves facilitating an organization’s capacity to self-reflect, self-regulate, and take control of its own processes of improvement and learning towards realizing its reasons for existing (Kumawu and Kraus, 2007). The flexibility in the application of the OD approach gives much credence to cultural diversity and differences in the development needs of various economies. This makes OD a very important variable for promoting growth and development in any part of the world.

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1 A presentation made by Christian Legarde (2011) on the challenges of the global economy: opening remarks at the Royal Institute for International Affairs.
The theme “OD: A key to development” will among other issues discuss effective ways by which the OD approach can and is being applied to all the sectors of an economy in addressing the developmental challenges confronting nations. Presentations and discussions during the four day conference will be centered on the following sub themes:

- Institutionalization of Organisation Development
- Democracy, Decentralisation and Organization Development
- Emerging trends in Organization Development

A brief on the sub-themes

Sub-theme 1: Institutionalization of OD

This sub-theme seeks to explore and identify mechanisms and processes adopted by OD practitioners and change managers to embed OD practices in national development processes. The core focus here is to understand how the capacity of organizations and its labour force is enhanced with the knowledge and skills in OD intervention to expedite growth and productivity in public, private and not-for profit sectors of an economy. Ghana and some other developing countries are introducing pay policies such as the Single Spine Salary Scheme (SSSS) to scale-up the salary of public sector workers. But what can be done for productivity to match improved reward? To what extent can the institutionalization of OD facilitate the process? What have been done or is being done in the advance and newly industrialized economies with respect to the institutionalization of OD - same or any different from what is being done in Africa and developing economies? For example a few of the major OD training programmes in Africa took place in 1996-97 (GTZ-EZE’s Africa wide OD training programme). The Organisation Capacity Improvement Consultants (OCIC) also provided OD training programmes in Ethiopia (1998-2000), Kenya (2000-2002) and 12 years of partnership between OCIC and the University of Cape Coast (UCC) training consultants in the field of OD in Ghana. How are these institutionalized efforts affecting the development processes?

Sub-theme 2: Democracy, Decentralization and Organization Development

Decentralization of governance and administration has been identified as an effective tool in promoting participatory democracy, development and local governance. However the implementation of the decentralization processes in many countries especially developing economies has been saddled with several challenges ranging from weak institutional capacities (such as human, infrastructural and financial) of the decentralized agencies to the reluctance in letting go of power and authority by the centralized agencies to the “fear of taking over” by local institutions. This sub-theme seeks to explore ways by which Organization Development (OD) methodologies can be used to deepen the decentralization process in areas such as accountability, local decision making and change management. It also seeks to explore the fit between the existing culture (i.e. organizational structures, attitudes and behaviours) and one that would enhance effective decentralization.

Sub-theme 3: Emerging trends in Organization Development

With the culture of society fast evolving due to advances made in Information Communication
Technology (ICT) and globalization, this sub-theme seeks to explore the emerging trends and approaches in organization development; how effectively organizations and OD practitioners are employing OD methodologies to adapt in new markets, new technologies, new motivation and sentiments, and challenges of modern society and cultures. This sub-theme also seeks to examine whether today’s culture is promoting true emancipation and freedom or abuse of democracy, and whether OD provides the remedial intervention.

Join us to make history!
Come be a part of this remarkable history making event. Following the transformation of the OD Institute to become the International Society for Organisation Development (ISOD) in 2010, this will be the first ever ISOD international conference and to be held in no other place but Accra, Ghana, the most peaceful and democratic country in West Africa from July 24-27, 2013.

Call for papers

The ISOD-OCIC-UCC Conference Planning Committee now invites interested individuals to submit abstracts in line with the above theme and/or sub-themes as follows;

- 30th April 2013: deadline for submission of abstracts;
- 31st May 2013: notification of acceptance of abstract;
- 30th June 2013: submission of final paper for presentation.

Abstracts and enquiries can be submitted to the following email addresses:

ovicghana@gmail.com; or nobleocic@yahoo.co.uk

WELCOME! AKWABA! WOEZO! BON ARRIVE!
The ISOD Membership Information

Join us to build a new organization from our strong OD Institute legacy. Membership entitles you a listing in The ISOD Registry, receipt of the quarterly OD Journal which is one of the most often cited journals in the field of OD, a quarterly newsletter, and a 10% reduction in registration fees for The ISOD Conferences. Which membership is right for you?

The ISOD has 4 levels of membership available: Student Member, Registered Organization Development Professional (RODP), Registered Organization Development Consultant (RODC), Senior Member. The requirements for membership under these 4 categories are as follows:

**Student Member ($80)**  
Student members must be full-time students.

**Registered OD Professional (RODP) ($110)**  
Members interested in organization development. We have no requirements for regular members. Membership includes listing your credentials in the International Registry of Organization Development Professionals, quarterly newsletter, plus discount at each of our conferences (usually 2 per year). Member may use the initials, RODP, after their name if they agree to abide by the ISOD Code of Ethics.

**Registered OD Consultant (RODC) ($150)**  
Membership requirements for Registered OD Consultant (RODC):

A Doctoral degree or Master’s Degree in Organization Development or related field of study.

The professional consultant membership is entitled to the same membership services as regular members. The member is allowed to use the initials, RODC, after their name if they have a graduate degree in the field and agree to abide by the ISOD Code of Ethics.

**Senior Membership ($80)**  
Members who are 62 years and older are entitled to this reduced rate. Senior members may use the initials, RODP or RODC, after their names if the meet the requirements of regular membership as stated above.

*For more information about membership registration go to www.TheISOD.org, or email info@TheISOD.org*
Advertising in The OD Journal

Want to create a presence in the O.D. world? Advertise in the most quoted journal in the field—the O.D. Journal. Your message will reach national and international decision makers and key players in O.D., including O.D./HR practitioners who are academics, consultants, in-house experts, and not-for-profit specialists. You get more access with your investment because the Journal keeps costs well below other academic and practitioner journals.

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3. Pick the issue(s) when your AD will appear.
   The ODJ is published quarterly each year: February, May, August, and November. Indicate in which quarters you wish your ad to appear.

4. Submit your AD.
   Send an electronic file (JPEG) of your advertisement to Gail Smith, Production Editor, Organization Development Journal at gsmith@theisod.org

5. Send payment.
   - After you complete steps 1–4, the ODJ will send you an electronic invoice for payment.
   - Write a check to the THE ISOD for the invoiced amount credit card is available upon request.
   - Let the editor know what information you require to process payment. The ODJ federal ID # and Vendor profile can be provided upon request.
Benedictine University’s doctoral program in Organization Development is designed to help today’s business leaders generate a professional work environment where people partner to discover better solutions, where change is not only accepted by encouraged, and where high performance is achieved by building trust, valuing teamwork and fostering employee development.

The PhD program at Benedictine University incorporates classroom and current work experience. It was one of the first graduate Organization Development programs in the country and is recognized as one of the top-rated graduate Organization Development programs in the world.

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For more information on the graduate programs at Benedictine University, call (630) 829-6208, e-mail psorenson@ben.edu or visit us on the Web at www.benedu/odjournal.

Benedictine University is conveniently located near I-88, I-355 and the Metra station.