ORGANISATIONAL DEVELOPMENT:

MATCHING UNDERSTANDINGS & EXPECTATIONS

Koenraad Van Brabant, January 23, 2018

Like most other people, I have worked for and with different organisations, contributing to their overall performance from different positions and in different roles. What has struck me over time, is the ambiguity around the term '*organisational development'* (OD), and the risk of mismatch between the organisation asking for OD support, and the resource person(s) or consultant(s) they hire.

I.   The Many Aspects of Organisational Development.

There are many different aspects that an organisation or network can seek support for. Here an overview with some illustrative examples:

- *Thematic-technical expertise*: Can you help us get better at cash-programming; gender; conflict sensitivity; accountability to affected populations ('customer relations'); savings and credit schemes; fund/capital raising; monitoring & evaluation; report writing; external communications? Etc.
- *Systems and procedures:* Can you help us get better at finance management and accounting; in our human resource policies and procedures? Can you help us identify and install better IT systems or adopt more IT based solutions? Can you help us assess the overall interaction between different systems, processes and teams, and make them more streamlined and efficient ('business analyst')? Can you help us clarify roles and responsibilities related to decision-making? Etc.
- *Strategic analysis and planning*: Can you help us do a strategic analysis of the broader landscape in which we find ourselves? Can you help us identify our particular strengths, our weaknesses; can you help us identify options of what we could be in the future; set priorities for where we want to go over the next few years, and outline a pathway that can get us there? How do we balance medium-term planning, with the need to be agile and adaptive to important changes? Etc.

- **Change processes**: Can you help us work through a major organisational redesign such as decentralisation or renewed centralisation; a major internal restructuring to become more efficient and effective; or a 'service redesign' to offer a more seamless experience to the user or customer? Can you help us with a significant change in our business model? Etc.

- **Leadership and effective teams:** Can you help us develop the leadership qualities of our senior staff and emerging talent? Can you help stimulate the 'inner leadership' in our larger workforce? Can you help us develop more collaborative and effective teams? Can you help us improve the decision-making processes in our organisation? Etc.

- **Governance:** Can you help us assess the effectiveness of our 'governing' entity? What sort of experience and expertise do we need on the Board / Council? How does a Board keep effective oversight without encroaching on the roles and responsibilities of the executive team? How is the Board accountable, and to whom, for its performance? Etc.

- **Learning**: How do we bring together the collective experience, how do we feed it back into our practices; how do we create a learning culture?

- **Collaborative capacities**: How do we overcome the 'silo' practices in our organisation? How do we balance creative competition with collaboration with other organisations or social groups, that are key stakeholders or who complement us in important ways? How do we collaborate: through instrumental contracts, as a consortium, as a partnership? What do we do when tensions arise in the collaborative arrangements? How do you design and steer a multi-stakeholder process? Etc.

- **Healthy and vibrant organisation**: Can you help us find ways of working better together? How do we create a positive atmosphere in which people feel motivated and energised, where talent and creativity can thrive, where people are stretched to be and do better but not exhausted and burned out, where we attract and retain talent? How do we encourage 'innovation' in our organisation? Etc.

II.   Organisations are Systems of People.

Before we look at matching 'demand' with the right resource people, we need to remember that organisations are

- **systems**: the various aspects are interrelated, like an organism more than an engine;

- **icebergs**: most of what shapes their actual functioning lies below the surface and is relatively invisible, including to those who work in them;

- **made up of people**: however much automation or robotics there is in them, it are still people that make the strategic and tactical choices (so far

- **exist in a wider 'eco-system**: that may be well balanced, volatile or in turbulence.

III.   Matching Demand and Support.

a.   The What: The demand for OD.

When asking for OD support, be clear and specific what you want, and why you want it. But also ask yourself whether that specific aspect of your organisation can be really *separated from other aspects*? Or whether strengthening it, can have *unwanted side-effects*? For example:

- Strengthening project-related monitoring systems can weaken the habit of observing wider contextual changes, because the focus on chosen indicators creates tunnel-vision that leaves us blind to the wider environment;
- Most financial systems are designed for oversight, not as enablers. How do you ensure that checks-and-balances do not become so heavy that it is impossible to do the right thing at the right time, or to find pragmatic, perhaps innovative solutions to practical problems? We don't want a culture of financial caution inhibiting experimenting even where, in Tony Hsieh's words, "*it is safe enough to try*";
- Typical ingredients of 'mainstreaming' thematic areas and richer ways of working, such as gender, conflict sensitivity etc. are: new manuals and guidance, some workshops and trainings expanded perhaps with a 'training of trainers', added responsibility for the topic to job descriptions and key operating forms, perhaps creating an organisational focal point. These may be necessary, but are they enough? Do staff have the right talent and personality disposition? Does the funding, do the planning and implementation practices, allow for long-enough engagement and continuity, and adaptability? Does the organisation, implicitly or explicitly, emphasise other priorities in its functioning? How do we avoid that 'mainstreaming' ends up as a watered-down 'tick the box' checklist?
- How do we ensure that recruitment processes pay attention to past experience and specific expertise, but also pick up the development potential of individuals ('talent spotting')? How do we ensure they identify other strengths of candidates e.g. related to team roles, that the organisation also requires?
- Decentralisation can bring significant benefits in terms of greater proximity to local contexts. But how do we ensure that collective organisational learning across the geographical divides does not become a casualty of decentralisation?

b.   The Who.

No single individual is an equally rich resource person on all possible aspects of OD. Personally, I have worked on various aspects and am comfortable doing so. Like others, I value being stretched beyond my comfort zone. But certain aspects of OD are beyond my area of expertise.

Professional integrity demands that we, as OD resource persons, are transparent about our strengths and limitations. It also obliges us to engage -and advice- a client if we have concerns over how the demand or

request is currently framed in its substance or proposed approach. That is what differentiates a consultant from a contractor.

c.   The Where.

Who is the focal point for the OD resource person(s), which unit in which department? Sometimes there is an openness in a particular unit that doesn't as yet exist within the wider organisation. This unit then may be the only entry-opportunity. But OD support processes that touch on the wider structure, functioning and even culture of the organisation, can be rendered ineffective by connecting them to an individual and/or a unit that doesn't have wider strategic traction within the organisation.

d.   How.

Two key aspects of the 'how' are the duration of engagement, and roles.

❖ *Duration of Engagement.*

Resource persons can be called upon for specific events, time-bound tasks or longer-term accompaniment.

- A specific event can be the delivery of a short-term leadership or mindfulness 'training', or the facilitation of a short gathering, for example a key moment in a strategic planning process, a senior management team meeting, or a staff retreat.
- A time bound task can be support for the fuller strategic analysis and planning, or a thematic organisational reflection and learning process. It can be the introduction and testing of a new IT system, the production of new HR policies, or development of an external communications strategy.
- A longer-term engagement or accompaniment involves the OD support person in the fuller implementation and resulting adaptations over a longer period, when unexpected challenges and side-effects will manifest themselves. Overall, there is a tendency to underestimate the time required for meaningful organisational development – and meaningful OD support.

We tend to underestimate the value for the resource person to have the opportunity to familiarise her or himself with the organisation or client, even for a modest role around a short event. Organisations are like people: No two are alike, and an organisation may not be at the same point from one year to the next. External resource persons require prior conversations to gain a decent feel for the nature of the organisation and where it is now, not only in its formalities e.g. of mission, finance, products and organigram, but also in internal dynamics and atmosphere. Provide that time, to get to know each other better

We tend to underestimate the time it takes to effect organisational change. OD support is often asked to help with the analysis and planning and/or to develop the necessary guidance or resources. Yet the bigger challenge is implementation.

Organisational change trajectories are not linear, and reversal is possible. Implementation tends to be affected by competing priorities; change overload; the slowness with which people change behaviours; possible inertia when a change in organisational culture is called for: We may be surprised by the 'friction', caused on the forward motion, resulting from the interconnectedness of different aspects of organisational life: seemingly 'technical' aspects turn out to be connected into the larger nerve system of the organisation. When implementation is slower than hoped for or planned, implementation also gets affected by 'second thoughts': hesitations, even among the original callers for change, when the deeper implications become clearer. Change energy evaporates when it loses momentum. But change processes also fail because of impatience: We keep changing and changing, because we are too impatient to let the effects of a change initiative consolidate and manifest themselves. A longer-term accompaniment, by a trusted OD resource person, can help you prepare for 'process' more than for 'plan', and provide the confidence to work with what emerges.

❖ **The Roles.**

Little understood, sometimes also by OD practitioners, is the diversity of roles that OD resource people can and must play. Resource persons (internal and external) can range from being very hands-on technical experts, to mentoring and coaching roles. In between, they can act as facilitators, trainers, but also reflective observers. As strategic advisors they can also draw the attention back to the bigger picture. Unexpectedly, they may find themselves in a role of mediator.

These roles are not exclusive, and several can be played even within the span of a day. Mastery consists in being good at the repertoire of roles, and sensing which one is the best fit for any given situation. Few people are equally good at all roles.

Many OD practitioners are reluctant to be the 'hands-on doers', who *do-it-for-you*. Not because they are lazy or insufficiently experienced, but because such full outsourcing generally means the development will not take root in the organisation.

There is insufficient appreciation of when it is appropriate to ask consultants to provide 'solutions' (or 'recommendations') and when not. When a problem is 'complicated', such as choosing and installing a new IT system, contracting and handing the task over to an external expert, is appropriate. But because of their systems and people-based character, many organisational and operational challenges are 'complex' rather than 'complicated'. They are better addressed through a process of internal creation and evolution, mentored and coached by a 'critical friend'.

A mismatch of expectations between the organisation and the OD resource person(s) will result in tensions. Sylvia, a colleague OD specialist, responded to a request of an organisation seeking a resource person with specific thematic expertise but to also act as a '*sparring partner'*. In subsequent exchanges, she therefore adopted more of a coaching style, working with relevant questions. In the last exchange however, the organisation wanted to hear what the resource person could 'deliver'. Though confident about the required

thematic expertise, she felt that the organisation was actually looking more for a hands-on technical expert than the advertised '*sparring partner'*. With some very strategic questions also remaining unanswered, and doubts about the longer-term effectiveness of a too hands-on role for an outsider in 'mainstreaming' (yet another) thematic competency in the work of the organisation, she signalled that she might not be the right person. In this case, the divergent views about roles and approaches became clear prior to any formal commitment, rather than halfway in the journey.

In conclusion: Think hard about what OD development support you want, but also about how each aspect of the organisation is connected to others. Change in one aspect, while holding all other aspects constant, is unlikely to succeed. Who will you nominate as focal point for the OD support – can that focal point act as connector and catalyst within the wider organisation? As an OD support person, be clear about where your areas of strengths lie (substantively and role-wise) and where your limitations are. Then both take time to discuss seriously what approach(es) will fit best the task and where the organisation is currently at. Only journey together when there is enough fit.