



THE OD GATHERING

2017-2019

“When multiple people feel the same itch at the same time, you have the makings of a movement.”

From the Founders to the Future

A Gathering to Build OD for Tomorrow’s World

By Matt Minahan

***Author’s Note:** As this and the following articles were being written, thousands of people around the world are dying of the coronavirus, the US is starting to address its legacy of racism and white supremacy, a seditious mob has occupied the Capitol, and a political transition is underway. We acknowledge that, given the urgency and importance of these national and international issues, a long and deep dive into the future of organization development might seem irrelevant and tone deaf. Our challenge is to faithfully represent work that has occurred over the three years prior to the recent turmoils. We believe that by being clear and honest about ourselves and our field in the following special section on The Gathering, we will all better be able to respond and take action on the current and future challenges that face our world.*

It is hard to know precisely when an itch starts. Once it reaches into our consciousness, we often realize the same spot has been itching for a while. Sometimes a long time. Sometimes that itch draws attention to a larger problem.

Most itches are felt in just one person’s body. When multiple people feel the same itch at the same time, you have the makings of a movement.

That’s a lot of what was behind the creation of The Gathering, a series of three three-day face-to-face meetings in 2017–2019. That was the best way to scratch this itch which many of us in OD were feeling, especially in 2016.

Fred Miller, Bob Marshak, and I had been attending in 2016 what we thought was going to be an OD conference that instead felt much more like the roll out of an HR initiative.

The event was so bad that I paid the airline change fee and left early. Others coped differently: longer days in downtown Atlanta, more tours of Ebenezer Baptist Church and CNN, more walks along Peachtree Street. The more we spoke with

people attending the conference, the more we realized that it was not just our itch, but that of many others as well.

Other than, “This isn’t what we came for, this isn’t what OD is all about, and let’s not ever do this again,” we didn’t really know what was itching. But we knew it needed to be scratched, it had been itching for a long time, and there was probably something deeper going on.

As I arrived at the airport to fly home, Fred Miller called and said, “We need to do something different. Better. Will you join me and Bob Marshak in that?” Me: “In what?” Fred: “Let’s create it.” Me: “What’s it?” Fred: “Let’s do OD. Get some like-minded, good-hearted people together and figure it out.” How to say no to that?

Rounding Up Fellow Travelers to Co-Create

We reached out to a diverse group of creative fellow travelers to form The Convening Group to help figure out what was itching and how to scratch it.

The first thing we knew is that the field of OD wasn't having deep, intense, long form conversations about itself and our role in the world that we longed for. Yes, there were fragments and bits and pieces and articles and books but nothing that offered coherence or a vision of the field. There was no place for the long form, deeply personal interactions that we know are the centerpiece of concerted action.

There was no place for all of the fragments of the field to come together to find common ground. There were lots of people doing coaching, diversity and inclusion, organization design, team building, community organizing, strategic planning, culture change, communications, training, talent management and other disciplines all busily working in our own silos, convinced that we held the real keys to what OD really is. But there wasn't much conversation or understanding across the disciplines.

Each discipline has connections to OD, but as the field has broadened and diversified, the connections have become more tenuous. In many ways, we have created the silos in our field that we work in our client systems to overcome.

We were also aware that we didn't have a way to hear from the broad diversity of OD practitioners, by race, gender, identity, nationality, and culture.

Not only was the itch commonly shared, but it was taking us deeper into larger systemic problems.

A Gathering?

What if we could bring together a diverse group of people across disciplines, identities, locations, and ages for deeper, more concentrated conversations about who we are as OD people to find common ground and create a future for ourselves and the field that others could take forward? How could we share the fundamental, foundational wisdom of the founders of the field with these newer generations that had never sat rocking with Edie and Charlie Seashore, or sat in a circle with Bob Tannenbaum, or watched Elsie Cross speak her truth about being a black woman in the US?

We realized that the founding generation of OD had passed along principles and values and beliefs about the field that now lived within us and that needed to be heard today. We also wanted to turn the futuring over to the young people who would be taking the field forward. That brought us to **From the Founders to the Future: A Gathering to Build OD for Tomorrow's World**.

Quickly, some design parameters emerged. This effort needed to be a bottoms-up, inductive, inclusive process. It needed to build momentum and be sustained over time; three three-day gatherings would be needed. Somewhere between 100–125 participants at each event seemed large enough for critical mass but small enough for real work to get done. Managing the invitations was the only way to assure that we had enough of the various disciplines and demographics to assure that representation and power were fairly and evenly distributed among the participants. Selecting an east coast city would enable affordable airfares from Africa, Europe, and the Americas. (We also had at least two participants attend from Asia.) The design needed to have structure but loads of space for pairs and small groups and topics to arise in real time out of the work in the room.

We agreed that the series of Gatherings was about:

- » Creating compelling content and interaction . . .
- » That is interesting and appealing to a widely diverse group of 125 people . . .
- » Designed in a way that is highly engaging . . .
- » Releasing the wisdom in the room . . .
- » Connecting our past and our history . . .
- » To influence the future of the field . . . in order to shape the future of the world.

The 2017 Gathering

The first-year efforts in the 2017 Gathering were about building community, finding common ground across our disciplines and demographic diversity, bringing forth from the community the lessons of the founders, and looking forward into the world of work and OD in the future. After a spirited activity to get all voices into the room, we invited a diverse panel of participants to share their personal knowledge and experiences with our most senior OD founders and teachers in a session called **The Founders: What I Have Learned and Do as a Result**. Looking forward, The Clearing brought us Jens Hansen on **The Future of Work** with some shocking truths about artificial intelligence and automation and the



Figure 1: Word cloud reactions from participants after the 2017 Gathering.

implications for organizational leadership, strategy, culture, and the workforce. Then Gervase Bushe addressed **New Directions for OD: Implications for Our Role, Identity, and Impact Beyond Diagnostic, Dialogic OD.**

We had found an itch felt by many and had begun to get beneath it. Having accomplished our modest goals for the 2017 Gathering, we started to think big picture. How could we best serve the field of OD with six more days over the next two years and another hundred or so invited volunteers? Could we put these prodigious talents to work on generating knowledge? On tackling the challenges that have faced the field for decades? On producing

a document to share with the world? On what topics? We decided to open the Gathering with exactly that question.

The 2018 Gathering

The 2018 Gathering began with community building to reach out inclusively to the new participants who had not attended in 2017, followed by a presentation from Darshi Modi, Adi Brown, Nadia Bello, Joel Brown, Holly Brittingham, and Chris Young of the Gen X group, challenging us to hold our roots more lightly in order to see what routes might emerge:

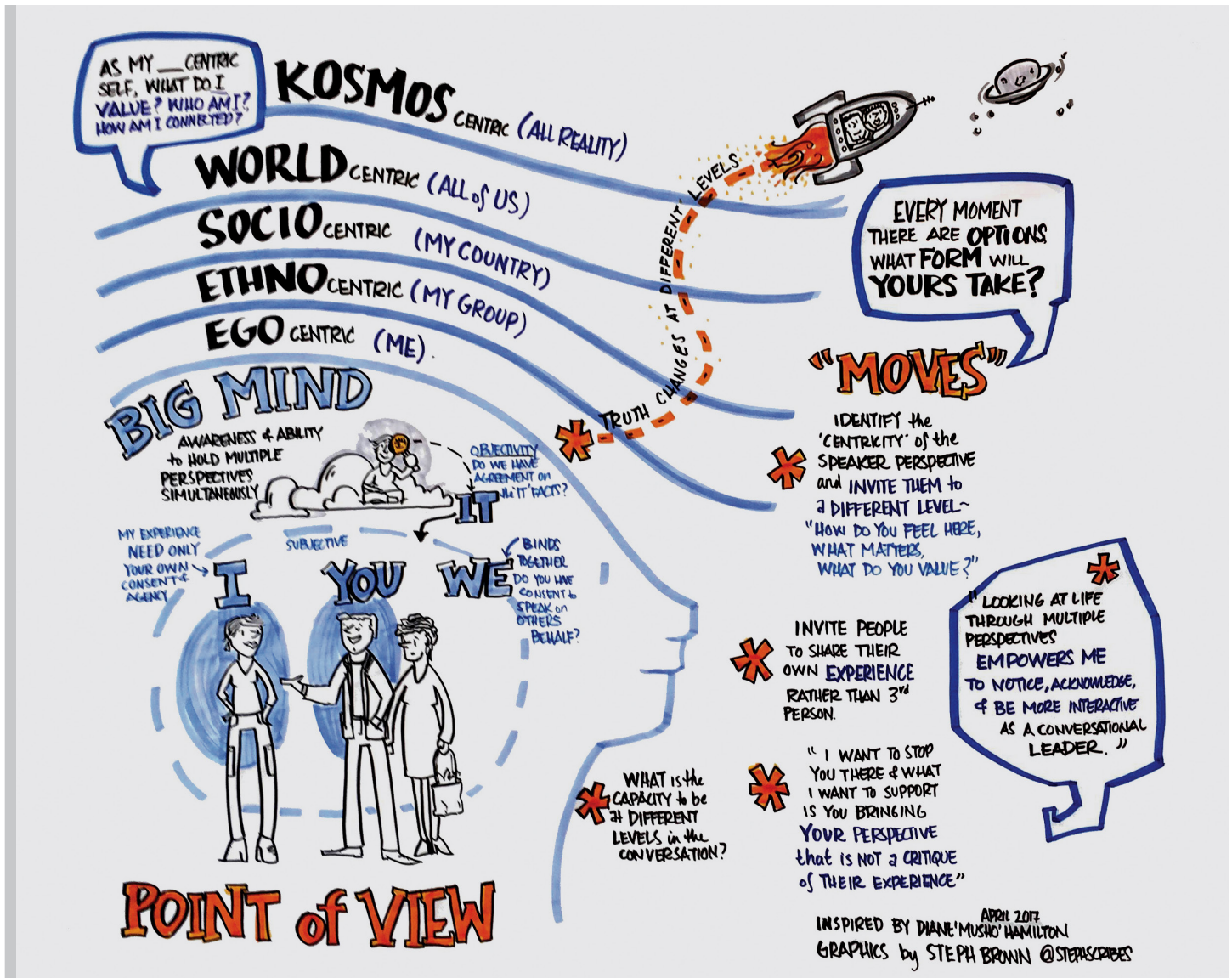
"If you think of culture always as a return to roots—R-O-O-T-S—you're

missing the point. I think of culture as routes—R-O-U-T-E-S—the various routes by which people travel, culture travels, culture moves, culture develops, culture changes, cultures migrate, etc."

—Stuart Hall

Culture is always a translation

Futurist Margaret Regan brought a strong message about the future of diversity along with her voice-activated robot Jibo about the future of brain chips, virtual worlds, gene editing, 3D printed pills and food, writing, and even group facilitation. Her message was both compelling and frightening, and she shared with us



the *Future Trend Cards* created for the DEI Futures Project.

Synthesizing the results of several concurrent sessions, we identified four topics to be explored by Circles of Work:

- » What is the Definition of OD?
- » What is the essence of OD, the vision for the field, and the critical needs to be addressed?
- » What values are needed to sustain the field and the world for the future
- » What competencies does the field need, which morphed into capabilities for the future?

Having a common statement on the unique value that OD provides to society, organizations, and individuals can further unite OD professionals regardless of their individual role or focus in the field and allow us all to collectively pull in the same direction as we strive to have a positive impact on the world. It can help to define the loose, permeable boundaries which delineate the field of OD from adjacent fields, shape our identity, and offer a light by which to guide the practice of OD as we move into the future.

Volunteers gathered around the topics of their interest. Selected leaders for each of the Circles, began to define their task, and develop a plan for their next several meetings.

Most Circles met 6–8 times in the first part of 2019, though there were many more meetings among Circle leaders, including in September when all of the Circles presented their work to each other for feedback and alignment.

In October, they presented their work to The Gathering Convening Group so we could finalize the design for the last of our three Gatherings.

Our first Gathering took 9 months to plan, 14 drafts to design, and 10 pages to outline. By now, we were so clear about the Circles of Work and the way forward that our third Gathering took 6 weeks to plan, just two drafts, and the design fit onto one page.

The 2019 Gathering

There was no doubt that the purpose of the 2019 Gathering was to honor and build on the work of the four Circles, to bring each to the full community, to consider and integrate common points across all four, and to leave with a 90% version of each of four topics.

After community building to integrate new members who had not participated in the previous Gatherings, each group presented its work to the full community, followed by small group conversations and

feedback. Overnight, the design team pored over the notes and flipcharts to identify cross cutting themes which the Circles then considered and integrated. Members were invited to visit other Circles to listen for themes and to cross fertilize.

The four Circles left with the commitment to integrate the feedback and consider multiple views in creating their 95% solutions. In the spring of 2020, the Convening Group met to integrate and align the work of the four Circles into a “final draft” for broad consultation.

And Then...

And then life happened. The country expanded its reckoning on race, now taking more seriously the challenges of white domination of power structures and wealth, creating huge work demands especially among the staff at Kaleel Jamieson Consulting Group, which has been providing the organizational and logistical

support to The Gathering. The virus happened to all of us, blowing up our plans for face-to-face working and editing sessions and further slowing down our progress.

As this goes to press, we are receiving endorsements and letters of praise and support from individuals and organizations around the world. We are collating the work of the four Circles into a document for publishing to the web and in hard copy. We are planning to publish it in 2021, with an invitation to consultants, teachers, scholars, and researchers to use it as a starting point for their own personal and professional work From the Founders to the Future.

The Itch, Scratched. The Future Clearer. The OD Body Stronger

The output of the four Circles of Work was developed by OD scholars and practitioners. We used our OD tools and knowledge to create a statement about OD’s vision for a better world and what OD can and must do to achieve it. We have used solid and well-established research methods to generate a list of OD values based on the input from hundreds of people. We have used an open and collaborative process by a diverse group of scholars and practitioners to create a consensus definition of what OD is, including several authors who have developed their own definitions. And we have put a stake in the ground about what capabilities OD practitioners and the field as a whole will need to achieve all of this.

Taken together, this work is intended to advance a shared understanding of the field’s intrinsic core—its heart and soul. Having a common statement on the unique value that OD provides to society, organizations, and individuals can further unite OD professionals regardless of their individual role or focus in the field and allow us all to collectively pull in the same direction as we strive to have a positive impact on the world. It can help to define the loose, permeable boundaries which delineate the field of OD from adjacent fields, shape our identity, and offer a light by which to guide the practice of OD as we move into the future.

This new focus is essential to build excitement and energy for the vital work performed by OD scholars and practitioners and attract individuals to enter and study the field. Bringing in new, diverse talent to the OD field, whether students starting out their careers or individuals transitioning from other professions, ensures we can continue to positively impact the people we serve now and in the future.

Specifically, we hope that this work would encourage you to:

- » reflect on the outputs in relation to your own practice to determine the extent to which your work aligns with these concepts.
- » discuss the outputs with your colleagues and clients to create your unique instances of contact with others.
- » integrate the outputs into frameworks, documents and curricula maintained by key OD networks and institutions.
- » share your thoughts, ideas, and feedback with the authors of these articles and the Conveners.

Through conversation, engagement, and contact around these outputs, we hope that both current professionals and future generations may align around the concept that we are guided by the same north star as we all strive, each in our unique way, and contribute toward the achievement of a unified vision for the world, societies, organizations, and the individuals within them.

What follows here are articles written by the four Circles of Work. Each represents three years of thinking, writing, talking, consulting, revising. Each contributes to the larger whole that The Gathering constructed in 9 days of face-to-face meeting over 3 years and countless hours of work in between.

Matt Minahan is one of the organizers of The Gathering. He is President of MM & Associates, an international consulting firm specializing in strategy, structure, leadership development, and communications. Matt's clients are in the private and public sectors, implementing enterprise-wide change programs, including business strategy, mission, business process simplification, new structures, and communications. He worked as an internal for the first 15 years of his OD career, starting the OD function at The World Bank in 1990. Since 1997, he has been President of The Minahan Group. Along with several colleagues gathered at an OD Network conference on Large Group Systems in Dallas in 1995, he founded and ran the OD Network's list serve, called ODNet, with 12 specialized lists and over 3500 members at its height. He attended and blogged about each of the OD Network conferences from 2001 through 2014; his reports can be found on the Network's website. He is a former Chair of the Board of Trustees of the OD Network and the 2020 recipient of the Lifetime Achievement Award from the OD Network. He is former board member and an active member and volunteer for NTL Institute. He teaches in the MSOD program at American University, and is a guest lecturer at Benedictine University, George Washington University, and several other universities. He presents at regional, national, and international conferences, has published numerous articles in OD Network publications, including the *OD Practitioner*, the *OD Review*, *Practicing*, and *Seasonings*. He is a contributing editor to the *OD Network's Handbook for Strategic HR*, and has contributed chapters to several OD books. He can be reached at matt@minahangroup.com.

No one Circle can possibly represent all of OD; however, taken together, the four Circles create a portrait of a field that is at its essence optimistic in the face of daunting changes in global economics, humanistic in the face of machines and artificial intelligence that encroach on the boundaries of humanity, emphatic about demanding a more just and equitable world for all people in all places, and equally emphatic in our commitment to advancing organizational performance and individual development in a more just and resilient world.

A three-year effort like this happens with the support of many hands. Thanks to the members of The Convening Group for your sustained commitment and engagement, including Bob Marshak, Bridget

O'Brien, Fred Miller, Ilene Wasserman, Judith Katz, and Norm Jones. Thanks to all of the volunteers who supported our work in planning and onsite. Many thanks to the leadership and staff of the Kaleel Jamieson Consulting Group for providing all of the logistical support in planning, printing, producing, shipping, budgeting, hotel negotiating, credit card processing, and web site creation and maintenance. Thanks also to The Clearing for publishing the integrated report from The Gathering. Mostly, though, thanks to the almost 300 people who gave of their time and energy to join us in **From the Founders to the Future: A Gathering to Build OD for Tomorrow's World**.



THE OD GATHERING

2017-2019

“The leadership group developed and proposed to the Circle that its purpose was to review and synthesize a shared definition of OD. This parameter was linked to a reminder from the Gathering that the Circle’s work could stand at 85–90% complete because it would be debated further in future.”

What is the Definition of OD?

Report on the *Definition of Organization Development (OD) Circle of Work*

By Julie Smendzuik-O’Brien,
Yabome Gilpin-Jackson

What is the definition of Organization Development (OD)? This seemingly basic and foundational question of the OD field is one that emerging and seasoned scholars and practitioners continue to ask and indeed may not be an unfamiliar question to readers of this article.

The Result

The response, crafted by the representative working group of scholars and practitioners in the field of OD who were part of the OD Gathering, was as follows:

Organization Development (OD) refers to the interdisciplinary field of scholars and practitioners who work collaboratively with organizations and communities to develop their system-wide capacity for effectiveness and vitality. It is grounded in the organization and social sciences.

The Definition Circle arrived here, after a review of 38 variations of OD definitions in the literature (see *Table 1*).

When the Circle groups were formed at the Gathering, 18 participants elected to work with the Definition Circle. A leadership team of four individuals was then identified from the Circle. Because of the thematic idea of building for the future and because of the claim to the future by the Generation X participants during the 2017 OD Gathering, the leadership team was consciously composed of one Gen X, one boomer, and two millennials. The roles of these four were facilitator, co-facilitator, recorder, and a co-designer who also kept

the group honest. The members of the Circle are noted at the end of this article. This initial Circle of four leaders and others who subsequently joined the leadership group are asterisked.

Circle members launched into the work, well aware of the challenges to be faced. The definition and viability of OD has long been debated. The long-standing definition by Dick Beckhard described OD as: an effort (1) planned, (2) organization-wide, and (3) managed from the top, to (4) increase organization effectiveness and health through (5) planned interventions in the organization’s “processes,” using behavioral-science knowledge (Beckhard, 2006). This definition opens every textbook and handbook of OD. While this definition is foundational and widely accepted, many in the Circle considered it to now be incomplete. The core inquiry questions included:

1. What type of applied science is OD—behavioral, social, organizational, interdisciplinary?
2. How does OD apply to scholars and practitioners working in emergent, complex, collaborative (rather than top-down) and generative change contexts?
3. What are the desired outcomes of our OD practice—effectiveness and health? Resilience? Development? Transformation? Other?
4. Who is the target audience for OD work—individual leaders, groups, teams, communities?
5. What is the best descriptor of the scope of OD—a field, a discipline, an applied social science, a discipline, a profession?

Table 1. *Definitions Collected by the Definition Circle, 2019*

	Author	Year	Definition
1	Beckhard	1969	Organization development is an effort (1) planned, (2) organization-wide, and (3) managed from the top, to (4) increase organizational effectiveness and health through (5) planned interventions in the organization's "processes," using behavior science knowledge.
2	Bennis	1969	Organization development (OD) is a response to change, a complex educational strategy intended to change the beliefs, attitudes, values, and structure of organizations so that they can better adapt to new technologies, markets, and challenges, and the dizzying rate of change itself.
3	Blake & Mouton	1969	<p>Organization development emphasizes the "O" in every sense of the word. It means development of the entire organization or self-sustaining parts of an organization from top to bottom and throughout. True OD is theory based, team-focused and undertaken by means of self-help approaches which place a maximum reliance upon internal skills and leadership for development activities. It is top lead, line managed and staff supported.</p> <p>Development activities focus on the "system," those traditions, precedents, and past practices which have become the culture of the organization. Therefore, development must include individual, team and other organization units rather than concentrating on any one to the exclusion of others. OD is thus this comprehensive approach which integrates the management sciences, business logic, and behavioral systems of an organization into an organic, interdependent whole.</p>
4	French	1969	Organization development refers to a long range effort to improve an organization's problem-solving capabilities and its ability to cope with changes in its external environment with the help of external or internal behavioral scientist consultants, or change agents, as they are sometimes called.
5	Golembiewski	1969	Organizational development implies a normative, re-education strategy intended to affect systems of beliefs, values, and attitudes within the organization so that it can adapt better to the accelerated rate of change in technology, in our industrial environment and society in general. It also includes formal organizational restructuring which is frequently initiated, facilitated and reinforced by the normative and behavioral changes.
6	Lippitt	1969	Organization development is the strengthening of those human processes in organizations which improve the functioning of the organic system so as to achieve its objectives. Organization renewal is the process of initiating, creating, and confronting needed changes so as to make it possible for organizations to become or remain viable, to adapt to new conditions, to solve problems, to learn from experiences, and to move toward greater organizational maturity.
7	Schmuck & Miles	1971	Organizational Development can be defined as a planned and sustained effort to apply behavior science for system improvement, using reflexive, self-analytic methods.
8	Burke & Hornstein	1972	Organization development is a process of planned change — change of an organization's culture from one which avoids an examination of social process (especially decision making, planning, and communication) to one which institutionalizes and legitimizes this examination.

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	Author	Year	Definition
9	Hall	1977	Organizational development refers to a long-range effort to improve an organization's problem-solving capabilities and its ability to cope with changes in its external environment with the help of external or internal behavior-scientist consultants or change agents.
10	French & Bell	1978	Organization development is a long-range effort to improve an organization's problem-solving and renewal processes, particularly through a more effective and collaborative management of organization culture—with special emphasis on the culture of formal work teams—with the assistance of a change agent, or catalyst, and the use of the theory and technology of applied behavioral science, including action research.
11	Beer	1980	Organization development is a system-wide process of data collection, diagnosis, action, planning, intervention, and evaluation aimed at (1) enhancing congruence between organizational structure, process, strategy, people, and culture; (2) developing new and creative organizational solutions; and (3) developing the organization's renewing capacity. It occurs through collaboration of organizational members working with a change agent using behavioral science theory, research, and technology.
12	Beer	1980	Organizational development is a process for diagnosing organizational problems by looking for incongruencies between environment, structures, processes, and people.
13	Burke	1982	Organization development is a planned process of change in an organization's culture through the utilization of behavioral science technology, research, and theory.
14	Davis	1983	Organization development consists of a series of theory-based workshops, techniques, programs, systematic approaches, and individual consulting interventions designed to assist people in organizations in their day- to-day organizational life and the complex processes this involves. All of this is backed up with beliefs, biases, and values held by the organization development practitioner.
15	Nielsen	1984	Organization Development is the attempt to influence the members of an organization to expand their candidness with each other about their views of the organization and their experience in it, and to take greater responsibility for their own actions as organization members. The assumption behind OD is that when people pursue both of these objectives simultaneously, they are likely to discover new ways of working together that they experience as more effective for achieving their own and their shared (organizational) goals. And that when this does not happen, such activity helps them to understand why and to make meaningful choices about what to do in light of this.
16	Warrick	1984	Organization development is a planned, long-range systems, and primarily behavioral science strategy for understanding, developing, and changing organizations to improve their present and future effectiveness and health.
17	Burke & Schmidt	1985	Organizational development is a process which attempts to increase organizational effectiveness by integrating individual desires for growth and development with organizational goals. Typically, this process is planned change effort, which involves a total system over a period of time, and these change efforts are related to the organization's mission.
18	Beer & Walton	1987	Organization Development comprises a set of actions undertaken to improve organizational effectiveness and employees' wellbeing.

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	Author	Year	Definition
19	French, Bell & Zawacki	1989	Organizational development is a process of planned system change that attempts to make organizations better able to attain their short- and long-term objectives.
20	Vaill	1989	Organization development is an organizational process for understanding and improving any and all substantive processes an organization may develop for performing any task and pursuing any objective. A “process for improving process” — that is what OD has basically sought to be for approximately 25 years.
21	McLagan	1989	Organization Development: Assuring healthy inter- and intra-unit relationships and helping groups initiate and manage change. Organization development’s primary emphasis is on relationships and processes between and among individuals and groups. Its primary intervention is influence on the relationship of individuals and groups to effect and impact on the organization as a system.
22	Porras & Robertson	1992	Organizational development is a set of behavioral science-based theories, values, strategies, and techniques aimed at the planned change of the organizational work setting for the purpose of enhancing individual development and improving organizational performance, through the alteration of organizational members’ on-the-job behavior.
23	Burke	1994	Organization development is a planned process of change in an organization’s culture through the utilization of behavioral science technologies, research, and theory.
24	Church, Waclawski & Siegal	1996	Organization development is a field based on values-promoting positive humanistically oriented large-system change in organizations — plain and simple. . . . if they are not morally bound to the core values of the field then they simply are not doing OD. OD is about humanistic change on a system-wide level. . . . It is about improving the conditions of people’s lives in organizations. . . . OD is about helping people in organizations.
25	Dyer	1997	Organization Development is a process whereby actions are taken to release the creative and productive efforts of human beings at the same time achieving certain legitimate organizational goals such as being profitable, competitive, and sustainable.
26	French & Bell	1999	Organization development is a long-term effort, led and supported by top management, to improve an organization’s visioning, empowerment, learning, and problem-solving processes, through an ongoing, collaborative management of organization culture — with special emphasis on the culture of intact work teams and other team configurations — using the consultant-facilitator role and the theory and technology of applied behavioral science, including action research.
27	Cummings & Worley	2001	Organization development is a systemwide application of behavioral science knowledge to the planned development and reinforcement of organizational strategies, structures, and processes that lead to organization effectiveness.
28	D. Anderson		Organization development is the process of increasing organizational effectiveness and facilitating personal and organizational change through the use of interventions driven by social and behavioral science knowledge.
29	Minahan		Organization development is a body of knowledge and practice that builds capacity by enhancing organizational performance and individual development, by increasing alignment among the various systems within the overall system. OD interventions are inclusive methodologies and approaches to strategic planning, organization design, and culture change, including leadership development, change management, performance management, coaching, diversity, team building, work/life balance, etc.

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	Author	Year	Definition
30	Kessler		Systemic engagement with organizations, networks, individuals, and groups to create spaces where success can thrive.
31	B. Cooke		OD is about management of change for a better world through organization USING sociology, psychology, socio-psychology, etc. UNDERPINNED BY action research as a collaborative/participatory principle DELIVERED BY trained, reflexive, values-led change agents.
32	Society for Human Resource Development (SHRM)		Process of enhancing the effectiveness and efficiency of an organization and the well-being of its members through planned interventions.
33	Gilpin-Jackson	2018	OD is the application of the behavioral and social sciences to develop groups of people from where they are to where they want to go through high-engagement and high-inquiry methodologies.
34	Jamieson	2019	OD is a process of planned intervention(s) utilizing behavioral and organizational science principles to change a system and improve its effectiveness, conducted in accordance with values of humanism, participation, choice, and development so that the organization and its members learn and develop.
35	Goldman Schuyler		OD is an interactive process of development using behavioral and organizational science to help a system evolve in ways that improve its effectiveness and health, usually involving members of the organization in seeing itself, reflecting, and then making changes. A skilled OD practitioner can see/understand systems and their dynamics; develop open, trusting relationships; and facilitate deep, transformational conversations as needed for such development. Such practitioners work with others from a foundation of self-awareness grounded in reflection and inquiry; they work skillfully to generate and analyze many kinds of data—all in service of designing systemic transformational processes for and with organizations.
36	Nickols	2019	Organization Development (OD) is an emerging, evolving area of professional practice that rests on an extensive body of proven behavioral and social science knowledge. OD practitioners possess numerous tools and techniques for effecting change in and to organizations. The primary focus of OD practitioners is one of facilitating improvement efforts initiated by and led from the top of the organization. These efforts aim at improving various aspects of the organization, including its culture, and especially the performance of its people, its processes, and the organization itself. The term “organization” might refer to a team, a department or division, a subsidiary, or an entire company.
37	Norlin		Organization development involves the design and facilitation of processes, conversations, relationships, and structures that enable people at work to learn, change, achieve their goals, and fulfill their purpose.
38	Bushe	2019	OD is a disciplined process of engaging the people affected in processes of inquiry and innovation that lead to better teams and organizations.

NOTE: The definitions numbered 1–27 in this table were excerpted from Egan, T. M. (2002). “Organization development: An examination of definitions and dependent variables.” *Organization Development Journal* 20(2): 59–70, Table 1.

The Circle leaders and group launched into the process with these challenges and questions in mind, taking an action research approach.

The work began with a review of Egan (2002) who boldly published the result of a “search of the literature” for definitions nearly two decades ago. At the time, Egan was looking for independent and dependent variables. His summary included 27 definitions he found covering the range of OD defined in terms of independent variables such as improvement, effectiveness, health, technology, problem solving, adaptation, learning, renewal, culture change, and goal achievement, to name a few.

Egan’s article was available to all OD Gathering participants in December 2018 when the Circles formed. Those present at the Gathering that year were invited to add any definitions they knew, which expanded the list to 38 after duplicates were ultimately deleted. These 38 definitions are by no means exhaustive of all published or known definitions of OD, but the group decided it was enough of a representative sampling with which to proceed.

The Process: An Action Research Project

The Gathering had asked each of the four groups to convene as soon as possible in January 2019 and to work quickly and in a disciplined way to produce an outcome for further review by the community. The Definition Circle took this to heart. The work took on the form of a participative action research process with ideas that emerged at each meeting being considered and evaluated during the week and returned to the next session for further refinement. The description of action research used by the Circle was “a democratic and participative orientation to knowledge creation. It brings together action and reflection, theory and practice, in the pursuit of practical solutions to issues of pressing concern” (Bradbury-Huang, 2015).

Four meetings to be held during the last week of the month were scheduled from January to April. The leadership

group met prior to those sessions to design the agendas and committed to a process of 60- to 90-minute meetings with assignments between the meetings for small groups to further consider and develop ideas about the definition. The leadership group developed and proposed to the Circle that its purpose was **to review and synthesize a shared definition of OD**. This parameter was linked to a reminder from the Gathering that the Circle’s work could stand at 85–90% complete because it would be debated further in future. The Circle leaders also recommended these Rules of Engagement to Circle members:

- » Circle leaders have authority to facilitate and move the group forward
- » Circle Leaders are charged to work through the tension between dialogue and generativity
- » There will be group and individual assignments between meetings
- » The group will engage in collaborative assessment of emerging outcomes— all data belongs to the group
- » Trust the process and disciplined approach

At the first meeting, the Circle considered criteria that the definition should meet; some of the ideas voiced were *short, inspiring, minimal jargon, have purpose and outcome elements, pithy, concise, human centric, scientific, easily understood*. It was a challenge to sift the 38 starting points through these lenses. As might be expected of an OD group, the Circle had as much discussion about its process as about the content of the definition: when to meet, how long to meet, how to start the meeting, how to end the meeting. *Figure 1* shows responses of Circle members at the end of the first meeting.

Each meeting began with a quick check in by Circle members, an introduction to the task of the week, a discussion of ideas in break out groups, a plenary, an assignment of a task for the week between sessions, and then a closing word. Small groups were randomly assigned at the first meeting and then worked together during the meetings and between meetings. The meetings were hosted by the leadership

group using Zoom virtual meeting software and a spreadsheet in Google docs became the common repository for the meeting notes and products. See *Figure 1* for the check-out after the first meeting; this momentum carried, even when the work became more difficult.

This process cycle was repeated for each meeting, thus having the Circle engaged in an action research spiral in the Lewinian tradition with each step entailing planning, action, and reflection (including fact-finding) about the result of the action to inform the next steps (Lewin, 1946)

The content side of the work became sticky quickly. Circle members were challenged to select parts of the List of 38 that they thought described the field for the present and for the future. The first assignment between meetings was to complete the sentence

“Organization Development is a _____ (field, profession, science, discipline, pick one of these or choose your own word) that _____ (does something, fill in the blank.)”

The Excel worksheet on Google docs was filled with individuals’ ideas. At the second meeting, the questions of “What do we do?” “How do we do it?” and “Why do we do it?” was suggested by a member, and fruitful consideration was given to these over the next week. The assignment was for each small group to independently



Figure 1: Initial check-out after Meeting 1.

come up with its definition using the “fill in the blank” method along with the three questions. This effort brought the number down to eight definitions.

At the meeting in March, the group was bogged down. Coghlan (2013) has called action research a process of “messy, iterative groping in the swampy lowlands,” which to some extent, this work had become. The group began to lament words that were being left behind, such as *communities, holistic, systems, human, research-based, thriving world, inclusive, behavioral science*. And ideas swirled.

- » Is it an “approach,” a “discipline,” a “field,” or something else?
- » Need to include both theory and practice
- » It is rooted in “science”—which ones? Behavioral, organizational, multiple social sciences?
- » Can we define it in one sentence—to give an intelligible explanation “to my mother” (in the words of one participant)?
- » Word challenges: “systems” now sounded like “information technology,” “health” or “organization health” had too many meanings, even “organization” was problematic for some

A Group of Four, which grew to a group of eight (almost half the entire Circle) but maintained the same name, agreed to meet before the last scheduled meeting to weigh the various ideas to date. One member generated a list of the Circle’s tension points for discussion and did a basic web search for definitions of the field of Organization Development and sister fields for comparison, including Human Resource Management, Management Consulting, and Change Management. The Group of Four noted that this compilation acknowledged the difference between these connected fields, but the popular Organization Development definitions were still problematic, not fully representing the experiences of Circle members and the scholars and practitioners represented by the Circle. The Group of Four wrestled with the ideas of the Circle to date and returned to the April meeting with the following recommendation:

Organization Development is a field, grounded in the organizational, behavioral, and social sciences, that engages organizations and their members to develop system-wide capacity, effectiveness, and resilience.

(April 2019 Definition)

The Circle felt this was a good set of ideas that reflected the conversations, and that met the 85–90% criterion—just shy of perfect! After April, some members chose to depart the Circle due to other commitments, personal closure with the project, or because the goal was to end in April and they were finished contributing. Two leadership members left the Circle, and two others were asked to serve in their stead because there was more work to be done.

The 2019 Gathering

En route to the third gathering of the entire OD Gathering community, the four Circles reported their progress to each other in October 2019 and to a town hall of the broader community in November 2019. After these sessions, Definition Circle leaders compiled a list of comments to present at the Gathering in December 2019. The comments were gathered under these headings:

- » Likes
- » Can we simplify “organization,” “social,” “behavioral?”
- » Does “organization” adequately capture where we work?
- » Might we qualify “field?”
- » How might we convey movement in the definition—evolving, emerging, generative?
- » And the proverbial, Other.

Each Circle presented its work on the second morning of the 2019 Gathering, and all listened for where there were connections, synergies, and common language. That afternoon, a World Café was held to generate more opinions on how to craft the definition and contribute to the work of the other three Circles. The Definition Circle was interested in maintaining the discipline that had characterized its work for months, and so bade Café

participants to hold their comments to these three areas:

- » What is missing in the offered definition that would make a real difference? What would you add? What would you take out?
- » What is your response to the feedback from participants in the Town Hall Meeting?
- » From your discussion, what is the most critical revision you would propose to the offered definition?

Six groups at the World Café worked on and submitted responses to these questions. That evening, Circle members worked feverishly with the input from the World Café. How much of it was new? How much of it should be considered? How did this new wave of information affect the journey of the Circle and the product it had nurtured? That evening, the Definition Circle’s presentation PowerPoint was again amended. Words affirmed or added from the World Café were *members, basic science and arts, interdisciplinary, capacity, human element, resilience, social sciences, human sciences, collaboratively, community, human sciences, system-wide, movement/action*. Of these, the Circle integrated *capacity, community, interdisciplinary, members, resilience, social sciences, and system-wide*. The plenary session pushed back on *members and resilience*, and the Definition Circle members proposed this 95% definition, excited by the emergence of a hitherto unspoken word, “VITALITY,” in lieu of “resilience.”

Organization Development is a field that works with organizations and communities to develop their system-wide capacity for effectiveness and vitality.

We are grounded in the interdisciplinary social sciences.

There was, however, one more evening to pass, and sentiment was intense. Furtive whispers were exchanged, furrowed eyebrows were seen, one of the Circle leaders roamed the room with an open laptop, polling community members about the words on the screen. Lobbying for *collaboratively* was heavy. After this additional

data-gathering step in the action research process, heads of the Definition Circle leaders were again put together to make final adjustments. Presented the following morning was the definition below. The lead Definition Circle facilitator solemnly explained the importance of the definition, noting that it is about the identity of OD professionals. The co-facilitator of the Definition Circle cautioned in an equally solemn tone that there was “blood on every word,” so Gathering participants should be careful about further recommendations.

Organization Development (OD) is an interdisciplinary field of scholars and practitioners who work collaboratively with organizations and communities to develop their system-wide capacity for effectiveness and vitality. OD is grounded in the organization and social sciences.

At the meeting in March, the group was bogged down. Coghlan (2013) has called action research a process of “messy, iterative groping in the swampy lowlands,” which to some extent, this work had become. The group began to lament words that were being left behind, such as *communities, holistic, systems, human, research-based, thriving world, inclusive, behavioral science*. And ideas swirled.

- » Is it an “approach,” a “discipline,” a “field,” or something else?
- » It is rooted in “science”—which ones? Behavioral, organizational, multiple social sciences?

This definition takes for granted that the essence of OD is to elevate humanity amidst the megatrends impacting organizations and society; that OD scholars and practitioners align with the values and ethics of the field; and that OD scholars and practitioners continually develop, grow and model the capabilities required in the field. [NOTE: This second paragraph shows the connection between the Definition and the work of the other three Circles but is not part of the definition.]

The Definition Circle ended this part of the journey as did the other Circles, because the Gathering ended. The Circles were to contribute to a document that would be circulated through organization development organizations, university programs, and other professional groups for further contributions.

Done, But Not Over

The lead author of this article has since further participated in two major presentations on the entire package of work from the OD Gathering during 2020. The first was a professional development workshop in August at the 2020 Academy of Management annual meeting in which leaders from all four Circles participated. The second was a presentation at the Minnesota Organization Development Network vir-

tual monthly meeting in September 2020, in which this author and another participant from the Gathering were sole presenters. Response to the definition, and in fact to the whole body of work from all four Circles, was favorable. Those who heard the word were excited about “vitality” and looked forward to working with it. In all instances, Definition Circle members have encouraged OD professionals and scholars to work with the definition and see how their clients, customers, and they themselves fare in using it.

The second author, who was also the lead facilitator, was invited to present the definition work by one of the OD Gathering conveners at a professional practice circle of emerging and experienced OD practitioners. She has introduced the definition into two internal OD practice groups who as they stepped in and out of complex situations continued to ask: What is our definition of OD? She has also used the definition and full body of the OD Gathering work as input for strategic planning within the OD Network and in executive leadership work. In all instances this body of work has helped clarify and move people forward and has been favorably received. Circle leaders believe there is merit to this evidence informed definition, co-created by scholars and practitioners and internal and external consultants in OD. This process of the Definition Circle represented the very ethos and praxis of the OD field.

So maybe Definition #39 will stick.

Acknowledgements

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*Denotes Circle Leaders

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THE OD
GATHERING
2017-2019

“The Essence and the Critical Needs both inform the Vision for OD’s impact on the world. The Vision and the Critical Needs may evolve over time, given that the Critical Needs are themselves informed by the impact that OD professionals are able to have upon the world.”

What is the Essence of OD, Our Vision of the Field, and Critical Needs to be Addressed?

Report on the *Essence, Critical Needs, and Vision* Circle of Work

By Olga Blouch,
Christopher Cotten

In the last two decades, the needs of organizations have changed significantly due to economic, social, political, technological, and cultural pressures impacting them (Fourie, 2014). OD practitioners and academics must react, and if possible, anticipate how they will ensure the highest quality of service to meet these needs. These requirements bring to mind several questions for OD professionals, such as: how do we articulate the intrinsic core of OD? What are OD scholars and practitioners working to achieve? And what various organizational and individual needs are OD professionals well-positioned to help address?

Emerging from the 2018 OD Gathering, attendees were energized to take on the task of answering such questions, and a Circle of Work, titled *Essence, Critical Needs, and Vision* (ECNV) formed to address three topics: describe the essence of OD, articulate a vision for OD, and identify critical needs in the world which OD professionals may be well-positioned to address.

The Circle’s mission was to explore the three topics, including their definitions and how they related to each other, and to develop a clear, concise explanation of each topic that would clarify the work of OD and unify and invigorate OD practitioners and academics. The Circle leaders and members’ subsequent work included nine months of coordinated efforts to define key concepts and leverage OD approaches to build upon the wisdom documented from the 2018 OD Gathering. This article

outlines the process used by this Circle of Work, shares its outputs, and proposes applications for its outputs which may prove useful to OD scholars and practitioners as we collectively strive to excel in our service to others.

Conceptual Framework

With its three primary topics to explore, the ECVN Circle of Work quickly realized the need to define not only the topics themselves, but also their relationships to one another. To help guide its efforts, the first task the Circle undertook was to develop a conceptual framework (Miles et al., 2014) to clearly define the topics, relationships, and concepts within the Circle’s scope (see *Figure 1*). In this conceptual framework, the Essence of OD remains relatively static. The Essence and the Critical Needs both inform the Vision for OD’s impact on the world. The Vision and the Critical Needs may evolve over time, given that the Critical Needs are themselves informed by the impact that OD professionals are able to have upon the world.

Once the ECVN Circle of Work’s conceptual framework was agreed upon, it allowed Circle members to explore the three topics as standalone discussions while keeping in mind a given topic’s relationship to the other two. The conceptual framework also helped to set boundaries for the Circle’s discussions and ensured topics outside the scope of the Circle’s work did not become the focus of group conversations (e.g., whether OD should be considered a field or a profession).

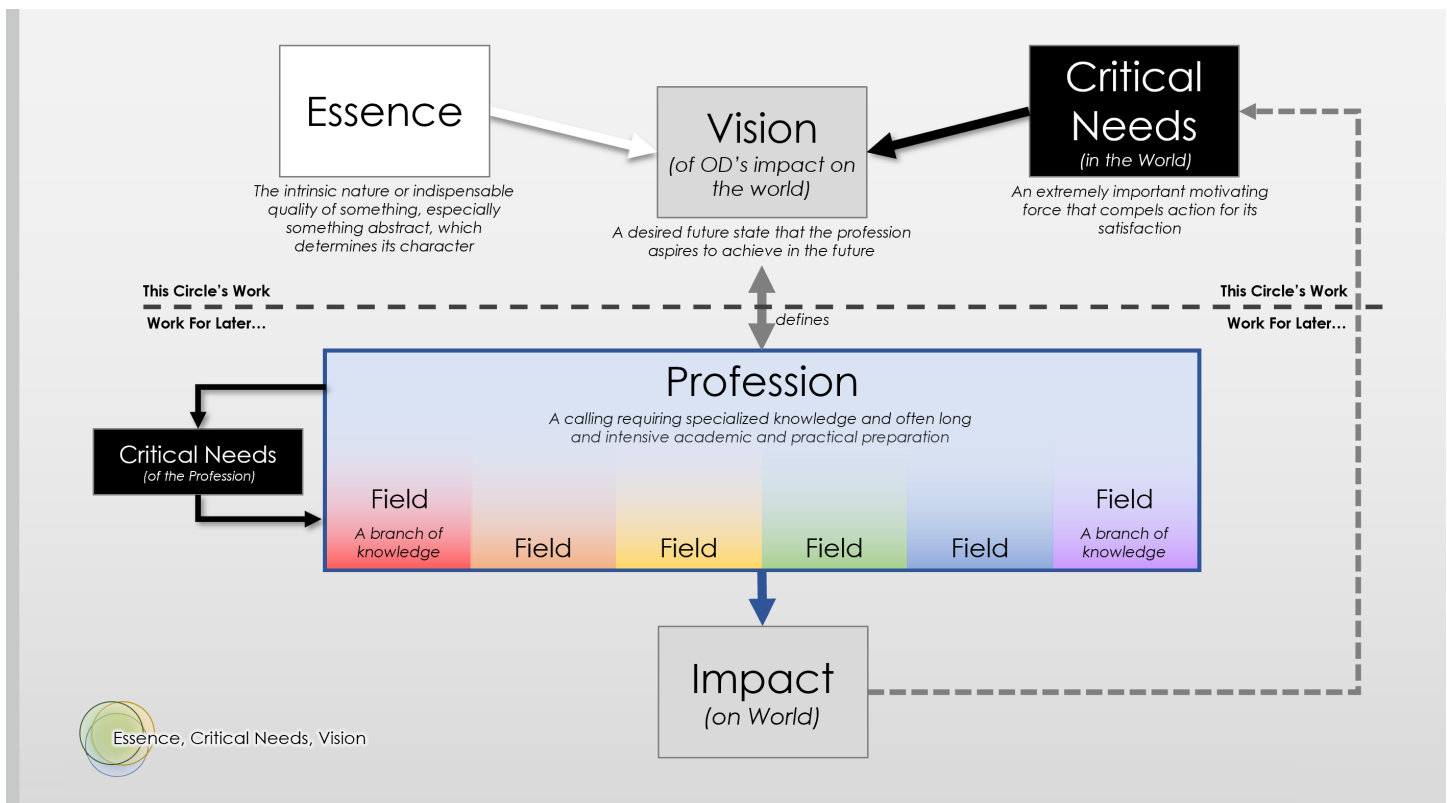


Figure 1: ECVN Circle of Work Conceptual Framework. NOTE: This figure demonstrates the ECVN Circle of Work's understanding of the relationship among its topics: essence, critical needs, and vision.

The Results

Vision of OD

For its purposes, the ECVN Circle defined **vision** as a desired future state which an individual or a group aspires to achieve.

The Circle members saw the vision of “the world, organizations, human systems” and the vision of “the future of OD” as directly influencing each other to the point where they were inextricable. As a result, the Circle crafted vision statements for both. The first vision focused primarily on OD’s potential impact on individuals, organizations, and human systems:

All individuals and organizations are thriving, adaptable and resilient in an ever-changing and increasingly complex and diverse world. People create and lead healthy, meaningful lives through effective, sustainable human systems. Effective leaders boldly and intentionally foster inclusive environments in which people connect with one another, see themselves and their organizations in new ways, and co-create their shared future.

The second vision focused on the collaboration among people who study and practice OD:

We, as organization development scholars and practitioners, support the realization of this vision by collaborating in a holistic ecosystem which inspires convergence across numerous specialties in cohesive, evolving dialogue about human systems. As an OD community, we exist in a virtuous circle of continuous learning and growth based on research, practice, and experience. We live our values and model concepts we espouse to others as we move into the future together.

Essence of OD

In developing its conceptual framework, the Circle adopted the following definition of **essence**: “the intrinsic nature or indispensable quality of something, especially something abstract, which determines its character” (Oxford University Press, n.d.). In subsequent discussions, Circle members elaborated on this definition

to describe essence as something’s timeless core—its soul. Essence encapsulates what matters the most about something, described at the highest-possible level.

As it worked through extensive conversations on this complex topic, the Circle determined that three elements compose the essence of OD: the **why**, the **what**, and the **how** of OD.

The Why of OD: People who practice and study OD aim to elevate humanity. The passion that motivates individuals toward OD work is the desire to improve the lives of others, to create healthier organizations, to develop leaders who create work cultures that provide meaningful work for employees, to help organizations thrive and realize their missions, and ultimately to positively impact society.

The What of OD: OD practitioners provide a presence to human systems. As a result of that presence, those systems are better able to function effectively and optimally. They can intentionally grow and adapt to shifting circumstances, living and thriving through all types of change (e.g., planned,

emergent). They can better collaborate, make decisions, and foster contact, understanding, and shared perspective across differences. The systems are better able to cultivate and benefit from effective, aware, and intentional leaders and to unlock creativity and innovation. They can overcome challenges which, to the people in the system, might seem impossible. Lastly, they can better work in ways that are sustainable and healthy for the system, its people and society.

Through the Circle’s discussions, it became clear that all three components (why, what, and how) were necessary to describe the essence of OD. Taking away any one component left the essence—the soul—lacking. While the result is complex, it highlights the inherent complexity and nuance in OD work as OD scholars and practitioners constantly manage across three components in their engagements with individuals and systems.

The How of OD: How we do the work, how we act, and how we show up in service of the systems we support is just as important as what we do and why, especially in challenging moments. We support and elevate the human element in everything we do and bring intentionality, discernment, and patience to whether, when, and how we engage. We navigate the complexity of being both in the system and maintaining boundaries. We consciously use our full selves and our presence and show up as whole humans (e.g., with emotion, feeling, values). We build equal partnerships with the people and systems we support, co-creating and discovering with people in the system. We advocate for diversity, inclusion, justice, and fairness. We bring the courage to hold up the mirror and help people in the system see the whole system and themselves in new ways to better move forward. Lastly, we mutually learn and develop with the people in the system and develop and enhance the capabilities within the system so we leave it better than when we arrived.

Through the Circle’s discussions, it became clear that all three components (why, what, and how) were necessary to describe the essence of OD. Taking away any one component left the essence—the soul—lacking. While the result is complex, it highlights the inherent complexity and nuance in OD work as OD scholars and practitioners constantly manage across the three components in their engagements with individuals and systems.

Critical Needs (and Opportunities)

In its conceptual framework, the ECVN Circle defined **critical need** as an extremely important motivating force that compels action for its satisfaction. Looking through the lens of a deficit-oriented approach by focusing solely on needs, however, limits the conversation and excludes a more appreciative focus (Cooperrider et al., 2008) which encourages the exploration of strengths and opportunities to build on what is working well. For the purposes of reflection upon how OD scholars and practitioners can have the greatest impact on the world, the Circle expanded the term “critical needs” to encompass both critical needs and opportunities.

The world, societies, organizations, and individuals therein are evolving rapidly, creating a diverse range of critical needs and opportunities upon which OD scholars and practitioners can make a significant impact. The following list is by no means exhaustive, but instead represents the needs and opportunities which were most readily apparent to the ECVN Circle

members. The needs and opportunities are listed below in order of their perceived priority (based on an anonymous survey of Circle members, starting with the highest priority or most important):

1. Maintaining or increasing **health and agility at all levels of system**
2. Navigating the **increasing rapidity of change**
3. Exploring, identifying, and living into **principles, values, and culture**
4. Maintaining **individual and/or group identity amid change**
5. Fostering **knowledge management and learning and development**
6. Supporting and promoting **sustainability**
7. Connecting with and adapting to advances in **technology**
8. Adapting to and influencing **shifting power dynamics**
9. Evolving and aligning **operating model(s)**
10. Maintaining **legal and regulatory compliance**

Through conversation in the Circle’s process, the realization emerged that these critical needs manifest at all levels of system, from society (at a global or national level) through the organization and group levels to the two-person system, and finally, the individual level. For example, “adapting to and influencing shifting power dynamics” could emerge at the societal level in the form of perceived challenges to group identity in relation to a larger context or in transitions in political administrations. At the organization level, mergers and acquisitions or rapid growth or decline in an organization might amplify and alter existing power dynamics. At a group or a two-person level, the need could manifest during restructuring or consolidation or in changing roles and responsibilities. Finally, at the individual level, the need could occur during any transition with perceived status implications. (See *Figure 2* for examples.)

Circle members also highlighted that responses to these needs and opportunities can include optimizing what already exists and/or creating something entirely new or different.

Through examining how the critical needs manifest at each level of system, an unintended benefit of the Circle’s discussion was that OD scholars and practitioners who operate at different levels of the system—whether coaches who work with individuals, scholars who study group dynamics, or community developers who tackle societal issues—all saw themselves and their work manifest in the field of OD. Some members described feeling more connected to one another as a result.

Process

Leveraging the Wisdom of the Group

Throughout its process, the ECVN Circle of Work relied upon the wisdom and experience of both its members and the broader OD Gathering collective to guide its efforts. For each topic, the Circle used the ideas, concepts, and discussion from the 2018 OD Gathering as its foundation. The Circle, consisting of 20 members, then further informed and refined these ideas as we moved through the Circle’s process. Each member brought varied perspectives. The Circle included individuals from academia and internal and external OD practitioners with a range of years of experience. The Circle leaders created numerous opportunities for members to contribute their perspectives and engage with one another in service of dialogue and contact.

Building on member recommendations, the Circle leaders used Gestalt theory (e.g., the Cycle of Experience and the creation of a new, shared figure) as a guide for the group’s process. That process included a high degree of interaction and sharing among people in the system to foster contact and encourage curiosity about others’ thoughts and feelings regarding the topic in question (Nevis, 2001). The Circle leaders developed a highly interactive, participative process (see *Figure 3*) featuring a mixture of synchronous and asynchronous collaboration (Justice & Jamieson, 2012). The Circle leaders applied this process to each of the three topics, with each topic representing a unit of work.

In the synchronous conversations (e.g., the Refining Call, the Brainstorming Call), intentional reflection provided

Level of System	Principles, Values & Culture	Shifting Power Dynamics
Society (Global, National)	<ul style="list-style-type: none"> • Evolving predominant beliefs around societal issues (e.g., civil rights, religion) • Dissonance between lived and espoused values at a societal level 	<ul style="list-style-type: none"> • Shifting global power dynamics (e.g., rising influence of China relative to the U.S. and Europe) • Perceived challenges to group identity in relation to the larger context • New political administrations • Globalization and nationalist reactions to it
Organization	<ul style="list-style-type: none"> • Developing and adhering to a set of principles and values of the organization and to guide behavior • Promoting and maintaining accountability for behaviors which collectively define an organizational culture supportive of the organization’s mission 	<ul style="list-style-type: none"> • Shifting internal power dynamics (e.g., new leaders) • Maintaining and adapting a sense of organizational identity • Mergers and acquisitions or, alternately, divestitures or shrinkage in response to contextual demands (e.g., the competitive landscape)
Group	<ul style="list-style-type: none"> • Defining group cultures and norms to guide behavior, foster effectiveness and mitigate interpersonal conflict • Aligning the group with the larger system and the individual members 	<ul style="list-style-type: none"> • Group restructuring, consolidation, or shake-up • New leaders
Two-person System	<ul style="list-style-type: none"> • Reflecting on one’s own personal values and those of the other person to create a relationship that benefits both individuals, is healthy, and can sustain external demands 	<ul style="list-style-type: none"> • Managing change in roles, responsibilities, and work identities between two individuals • Identifying and working through biases and power dynamics in interpersonal interactions
Individual	<ul style="list-style-type: none"> • Reflecting on one’s own values and ensuring integrity between those principles and values and individual actions 	<ul style="list-style-type: none"> • Promotions, transitions to leadership roles, or other changes in status • Maintaining a sense of identity in evolving circumstances • Evolving demands of leadership development

NOTE. This figure shows how critical needs can be applied to all levels of a system.

Figure 2: Manifestations of Critical Needs & Opportunities at Different Levels of System

opportunities for members to evaluate the statements and draft outputs contributed asynchronously into a shared Google Document. Circle members examined the draft content based on how well those statements represented both practitioner and

academic roles within OD; whether the statements were written in clear, concise language from a variety of perspectives; and finally whether the statements generated feelings of enthusiasm and excitement for members to motivate, energize,

ECNV Circle of Work Process

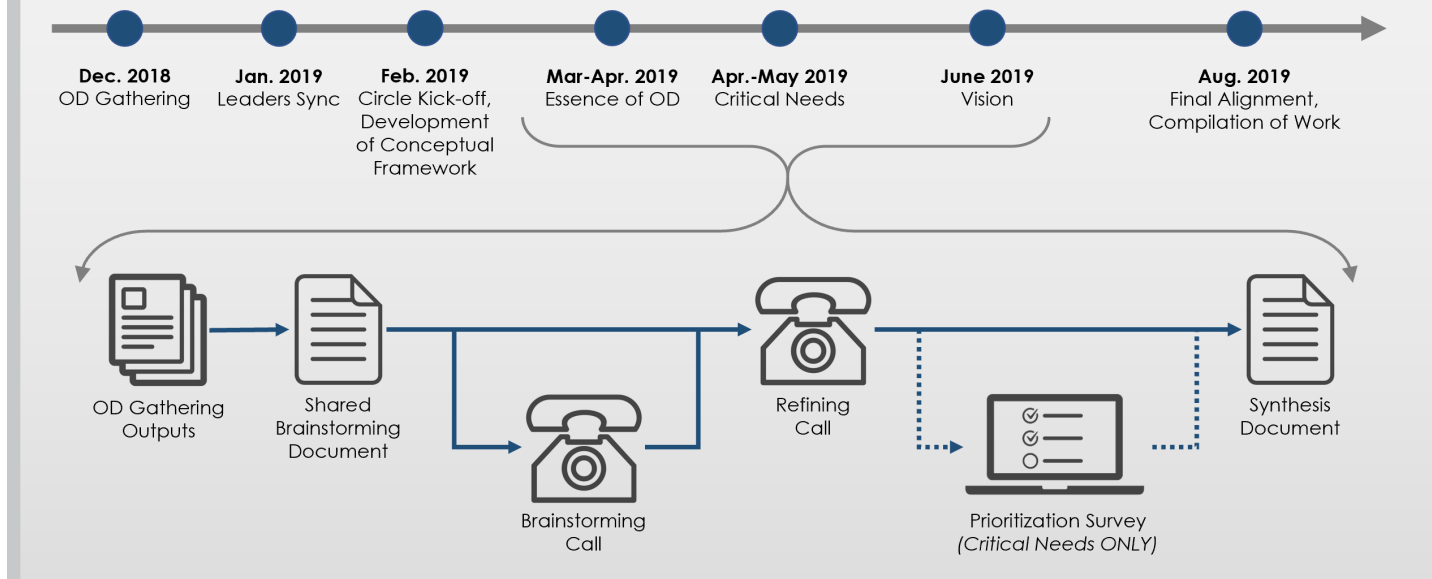


Figure 3: ECNV Circle of Work Process. NOTE: This figure shows the ECNV Circle of Work’s timeline and process.

or inspire them. Each call inspired robust exchanges among members in response to the brainstormed ideas and to new insights generated through the dialogue in the call itself. The Circle leaders documented the key outputs, decisions, and revised language, especially in the Refining Call, and captured the new, synthesized figure as it emerged from the group’s engagement with each other.

Once the units of work for all three topics were complete, the Circle leaders led one further engagement with the Circle members. The ECNV Circle of Work came together to step back and look at all three areas to ensure that the outputs for each topic aligned with one another as originally envisioned in the conceptual framework. No significant edits were made as a result of this process; however, the Circle members identified additional relationships among the topics beyond what had previously been envisioned.

The ECNV Circle of Work leaders presented the group’s work at the 2019 OD Gathering. The presentation included a review of the extensive process/steps used to complete the work over the last year, recognition of Circle members, and the unveiling of the “final” output. A brief discussion/Q&A followed with attendees offering both support and general feedback on the content. The ECNV Circle

reconvened in-person while at the 2019 OD Gathering to discuss the feedback and engage in a detailed fine-tuning of the Circle’s work. Modifications were made only with full support of the Circle members.

Applications of ECNV Circle of Work Outputs

The first benefit or application of the ECNV work relates to the Circle’s illustration of the essence of OD. The detailed explanation of the essence developed by both OD scholars and practitioners contributes to the establishment of a shared understanding of the field’s intrinsic core—its soul.

A second application relates to the question, “What are the most critical needs and opportunities in the world which OD can help address?” Having clarity around the critical needs and opportunities for which OD can offer support provides a powerful imperative for individuals working in and studying OD. Clarity about the needs and opportunities, specifically as they exist at each level of a system, provides people who work in OD with a more definable target and/or a picture of what we are striving to improve.

As a third application, OD professionals can use the identified critical needs and opportunities as a foundation for monitoring needs and opportunities in the future.

The critical needs and opportunities will continue to evolve. In a volatile, uncertain, complex, and ambiguous (VUCA) world, some needs will remain consistent, but others will ebb and flow.

It is our hope that the application of the ECNV Circle of Work outputs will energize and inspire OD professionals, and confirm how valuable and meaningful OD can be at all levels of system. In coming together to develop a shared understanding of our intent, delineating a shared purpose, and moving towards coordinated action, we give ourselves not only meaning, but we give ourselves power (McGoff, 2011). Through conversation, engagement, and contact around these outputs, we hope that both current professionals and future generations may align around the concept that we are guided by the same north star as we all strive, each in our unique way, and contribute toward the achievement of a unified vision for the world, societies, organizations, and the individuals within them.

Conclusion

As the ECNV Circle of Work completes its responsibility towards the OD Gathering’s collective work, we look forward to continuing to explore the extent to which this content resonates with OD scholars and practitioners who represent diverse

cultures and perspectives. We are excited to see how this work grows and touches the lives of our fellow OD professionals and how it authentically impacts organizations, individuals, and communities which we are humbled to serve.

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*Denotes Circle Leaders

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Advancing the Science, Practice & Impact of OD

THE OD GATHERING

2017-2019

“Given the foundational nature of values in the OD field, the impact of values on both our behavior and outcomes, we sought to explore our historical OD values and what our OD values could be, looking towards the future.”

What Values Will Define and Guide OD in the Future?

Report on the *Organization Development Values to Guide Our Practice Circle of Work*

By Sasha B. Farley,
Hyung Joon Yoon,
and César Padilla

Introduction

Organization Development (OD) is a values-based field, which means our values drive how we engage with, and provide support to, our clients (Anderson, 2017). In OD literature, a commonly used definition is Rokeach's (1973): Values are “enduring beliefs that a specific mode of conduct is personally or socially preferable to an opposite or converse mode of conduct or end-state of existence” (p. 5). By this definition, a value is not just a driving force that steers behavior and guides decision making but a value also defines a desired outcome. Given the foundational nature of values in the OD field, the impact of values on both our behavior and outcomes, we sought to explore our historical OD values and what our OD values could be, looking towards the future.

This article will describe a process of identifying OD values that began as part of the OD Gathering, which was a series of three meetings held over three years with approximately 300 OD practitioners and researchers from around the globe. The OD gathering resulted in circles of work that addressed four main aspects of interest: (1) OD competencies; (2) essence, vision, and critical needs of OD; (3) definition of OD; and (4) OD values. This article will describe the OD Values Circle final outputs, the process of exploring OD values, the creation of the OD value Circle of Work, the key principles that drove our exploration, and ways to use the results.

The Results

The OD Values Circle's goal was to answer the question of “What values will define and guide OD in the future?” The specific process used to identify the final list of values, value descriptions, and associated behavioral indicators are described in subsequent sections. At a high-level, the process included a series of meetings, phone calls, and a three-round Delphi research study. The Delphi study resulted in the identification of nine core OD values, value descriptions, and associated behavioral indicators. *Table 1* displays the nine core OD values and their descriptions.

Each value has several associated behavioral indicators that demonstrate the value in action and help guide the application and use of the values in practice. *Table 2* displays the associated behavioral indicators for the nine values.

The Process

OD Gathering 2018

The OD values work began during the second OD Gathering in December 2018. During this meeting, breakout sessions were held to explore various aspects of the OD field, including OD values. The prompting question for the OD values breakout session was, “What values are needed for the practice of OD that will make a difference to the world in the future?” The first breakout session was comprised of four participants with varying levels of experience in the OD field and who represented

Table 1: *Nine OD Value Labels and Descriptions*

Value Label	Value Description
Awareness of Self & System	_____ is to be conscious of all levels of a system. It involves recognizing the self and the client from a systems perspective while treating each human system as a whole.
Integrity	_____ is to align actions with ethical codes, relevant cultures, and guiding principles and theories. It involves managing conflicts of interest and encouraging justice.
Continuous Learning & Innovation	_____ is to seek knowledge; acquire new skills; and use new approaches, methods, and techniques. It involves taking a data-driven approach.
Courageous Leadership	_____ is to exemplify bold and effective conduct when necessary. It involves voicing truth directly to power and challenging the status quo.
Diversity	_____ is to accept and promote the unique presence and contributions of everyone. It involves emphasizing the importance of marginalized perspectives and identities.
Collaborative Engagement	_____ is to champion the inclusion and empowerment of all stakeholders, both internal and external. It involves encouraging and fostering open participation across the system(s).
Trust & Respect	_____ is to create a psychologically safe environment through demonstrating empathy. It involves exhibiting deep admiration for all humans and understanding their emotions and situations.
Client Growth & Development	_____ is to develop the capacity of our clients to maintain and continue the work on their own. It involves recognizing stages of development and fostering the ability of a human system to continually progress.
Strategic Practicality	_____ is to enable clients to identify and achieve desired outcomes. It involves recognizing that identified solutions need to support the needs of the organization as well as the individuals. It also involves adapting to changing situations, identifying alternatives, and thinking strategically.

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Table 2: *Behavioral Indicators of the Nine OD Values*

Value Label	Behavioral Indicators
Awareness of Self & System	<ul style="list-style-type: none"> • Is self-aware, conscious of own identity formation—choices, biases, values, beliefs, assumptions, perceptions, roles, personal history, and personal impact. • Clearly understands & differentiates personal and client aspirations, goals, and ego needs. • Recognizes paradoxes and competing demands and values within a client system. • Understands and interprets elements of organizational culture and communicates its impact on and implications for the work at hand. • Recognizes the value of all perspectives and seeks to expand perspective and deepen systemic and interpersonal understanding. • Explicitly identifies the interconnections and causal linkages between parts of an organization. • Considers the work to be performed, the formal organization requirements, the informal organization conditions, and the individual needs and knowledge. • Monitors and responds appropriately to constant micro- and macro-environmental change and its impact throughout the duration of the work. • Actively monitors and manages own holistic integration of mind, body, soul/spirit, and feelings. • Treats each human being as a person with a complete set of needs important for life and work. • Facilitates awareness and acceptance of the present situation in order to create change.

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Value Label	Behavioral Indicators
Integrity	<ul style="list-style-type: none"> • Exhibits congruency between what they say and do. • Accepts assignments they can competently perform and does not promise work that cannot be performed. • Works from the premise that the ends do not justify the means. • Promotes ethics and is impartial, fair, and encourages justice. • Is fair when negotiating and working with clients and is willing to terminate a relationship with clients if relationship would violate values. • Seeks common understanding about what confidentiality means and what can and cannot be held in confidence. • Keeps clients' records secured and takes steps to prevent misuse of client information. • Avoids conflicts of interest by working collaboratively to resolve existing and potential issues. • Commits to ethical codes and principles. • Ensures interventions provided are aligned with one another and grounded in relevant cultures and coherent principles.
Continuous Learning & Innovation	<ul style="list-style-type: none"> • Seeks feedback to learn and improve. • Seeks out new knowledge related to environmental factors and trends and how they may affect organizations. • Keeps abreast of new developments in the OD field and beyond. • Seeks continuous education to upgrade their skills and knowledge. • Retires or updates outdated approaches, methods, and techniques. • Investigates and tries new approaches, ways of working, ideas, and methods. • Encourages responsible innovation that addresses the needs of oneself and clients. • Uses applied behavioral science theory, concept, and method to support the work.
Courageous Leadership	<ul style="list-style-type: none"> • Has the courage to call out injustice. • Speaks truth to power and discusses difficult topic directly. • Challenges the status quo and assumptions especially about workplace norms, particularly if goals are negatively affected. • Demonstrates decisiveness, confidence, and clear, graceful action. • Raises and investigates potential issues that may or may not be noted by client. • Demonstrates courage to ask questions and be open about doubts. • Creates a working environment where authenticity, honesty, rigor, and integrity are commonly demonstrated fostering frank and open dialogue.
Diversity	<ul style="list-style-type: none"> • Strives to model acceptance of self and others. • Shows respect and acceptance for diverse thoughts, views, opinions, approaches, and people. • Appreciates that every individual is unique and deserves to be respected. • Understands that the pace of understanding, development, and change varies among individuals. • Is sensitive to and promotes cross-culturalism, diversity, equity, and inclusion. • Actively engages diverse voices in the room while paying attention to diversity dynamics including identity. • Helps clients develop the skills and capacity to engage in and navigate conversations around diversity, equity, and inclusion.

Continues next page

Value Label	Behavioral Indicators
Collaborative Engagement	<ul style="list-style-type: none"> • Promotes the importance of meaningfully and purposefully involving a diverse group of stakeholders in interventions and change initiatives as early as possible. • Includes others' voices in written or spoken form to enable expression of diverse viewpoints. • Generates participation by creating opportunities, both one-on-one and in groups, for the expression of viewpoints and needs. • Builds trusting environment that provides a safe space for open, honest & transparent communication. • Designs avenues to balance the power and increase participation of all stakeholders, including the marginalized. • Promotes an inclusive culture that recognizes, respects, and values people's differences.
Trust & Respect	<ul style="list-style-type: none"> • Expresses empathy to allow others to feel comfortable to express their positive and negative feelings and thoughts. • Seeks to understand and articulate what others are experiencing emotionally and cognitively, in ways that they feel accurately portray them. • Refrains from making judgment about others. • Respects all humans, their cultures, and their environment. • Conveys good or bad information without prejudice in a neutral and respectful manner. • Accepts that most of the time everyone is behaving the best they can with the resources they have available to them. • Humbly listens, speaks, and acts from a spirit of sincerity. • Is fully present when working with clients and keeps the best interest of the client in mind.
Client Growth & Development	<ul style="list-style-type: none"> • Encourages clients to take responsibility for personal and overall system growth and development. • Recognizes the stages of development when designing interventions. • Assesses the readiness of all levels of the system for intervention. • Develops others' capabilities in order to ensure sustainable development. • Trains and educates people in the system so that they can initiate and execute change on their own. • Helps the client learn from non-productive behaviors in order to develop behaviors conducive to growth/development. • Educates and encourages interpersonal skills among all levels of the organizational structure.
Strategic Practicality	<ul style="list-style-type: none"> • Knows common organization elements such as mission, vision, business strategy, business models, business processes, and budgets. • Helps the client implement interventions to achieve desired goals. • Supports strategic alignment of individual and group goals with the vision, mission, and values of an organization. • Works with client to assess the impact of change on business results. • Helps the client define clear, measurable goals and desired outcomes. • Helps the client choose actions most likely to achieve top priorities, sometimes in thoughtful compromises of comfort, popularity, or other lower values. • Facilitates gaining clarity and alignment towards long-term goal & overall strategy. • Encourages developing alternative approaches and solutions.

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Initial OD Values from the 1st OD Gathering Breakout Session and Feedback in December 2018

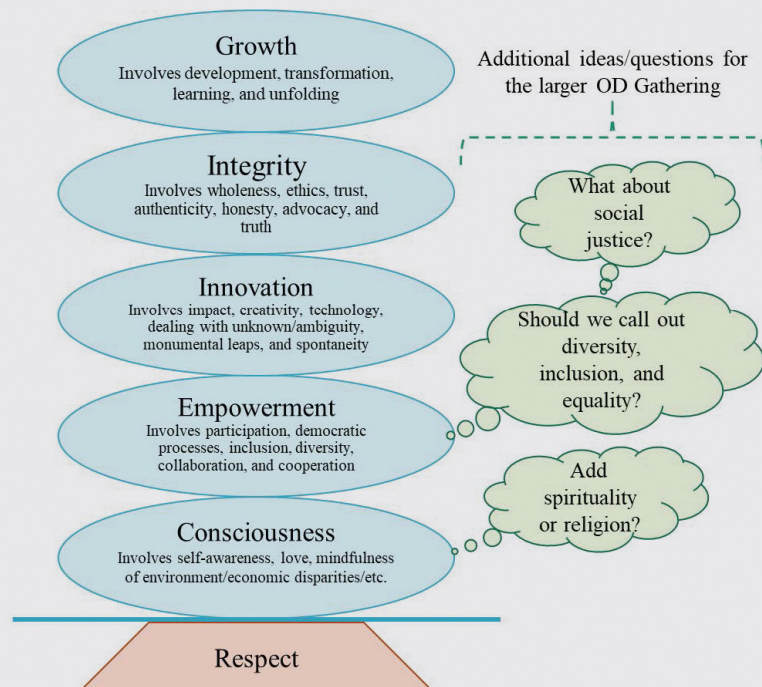


Figure 1: Initial OD Values From the First OD Gathering Breakout Session in December 2018

both academia and applied practitioners. During this session we created a visual with six values that applied at all levels of the system including personal, individual, group, organizational, societal, national, and global. Figure 1 shows the visual depiction of the results. Four participants from the breakout session shared the resulting visual and six OD values list with the larger OD Gathering. The participants provided initial feedback to the six values. This feedback included suggesting additional values of social justice and spirituality/religion. In addition, some OD Gathering participants discussed that diversity, inclusion, and equality should be called out and highlighted as an independent value instead of simply being a part of another value. These suggested elements are also depicted in Figure 1.

The OD Values Circle was created following the session of the OD Gathering, where participants volunteered to explore OD values further and to create a list of values to bring to the next OD Gathering in 2019. Thirteen people signed up and we met to discuss a plan for working together over the next year and select Circle leaders. The specific goal of the Circle was to answer the question of “What values will define and guide OD in the future?” The

immediate task was to build on the preliminary list of six OD values created during the breakout session.

During the first meeting, the OD Values Circle considered beginning anew because the values presented in Figure 1 were created by only four individuals and the Circle wanted to include the voices of a larger and more diverse pool of OD practitioners and researchers. The Circle collectively identified seven principles to help guide our work and decisions as we sought to identify a list of values to define and guide OD in the future. The seven principles that the Circle identified were:

- » Identify values that OD practices (we should practice what we preach)
- » Values should encompass instrumental and terminal values
- » Work remains unfinished until buy-in and consensus from diverse, global representatives are secured
- » Involve as many entities and people as possible
- » Review existing work, but the purpose is to discover values for the future
- » Use clear criteria for inclusion
- » Make it practical (labels, definitions, behavioral indicators/examples)

OD Values Circle Work

The OD Values Circle met a few times in early 2019 to review our principles and goals and to determine an appropriate path forward. The Circle conducted a literature review of all published writing on OD values. The Circle leaders conducted a literature review on OD values, and members provided insight on additional resources. Circle leaders shared a summary document with the full circle. Upon completion of the literature review, it became apparent that the literature on OD values contains overlap but also significant variation in values lists. This variation highlighted a lack of current consensus on OD values. Due to this lack of consensus and our Circles goal to identify values that would define and guide OD in the future, we decided to conduct a future-oriented study instead of relying on historical literature.

The OD Values Circle called for a research study to identify new OD values. This research study would be conducted with an international sample of OD practitioners and researchers to gain diverse perspectives and try to achieve consensus on core values for OD. Together, the Circle decided the best study design to achieve our goals was to conduct a three-round Delphi survey study starting with an open prompt to provide three to five values, descriptions, and associated behavioral indicators that can help guide the field of OD in the future. Sixty participants were selected from over 100 respondents, and 42 participants participated in at least one round of the study.

Participants represented OD practitioners and researchers who practiced in 58 countries, in five continents and who represented diverse groups in terms of age, ethnicity, gender, and educational backgrounds. Throughout the study, eight OD values Circle group members served as a small advisory council and met with the research team which was made up of the Circle leaders and a PhD student, to assist us in making decisions on any conflicting or complex feedback from the study participants. Round 1 of the study sought to gather values, value descriptions, and associated behavioral indicators from participants to aggregate into a list of 10 values or

less. Round 2 of the study sought to refine values and receive feedback and validity ratings from participants on the list of values from Round 1 to begin building consensus. Round 3 of the study sought to gain consensus and collect final rating on the validity and additional feedback on the list of values from Round 2 to generate the final list of nine core OD values. For more detailed information on the study, see Yoon, Farley, and Padilla (2020).

OD Gathering 2019

During the third and final OD Gathering held in December 2019, we presented the research design and analysis process our Circle used and the final list of values, descriptions, and behavioral indicators to all the OD Gathering participants. The participants then broke into small groups to discuss the results and provide feedback, inputs, and suggested edits. One major piece of feedback, and in-depth discussion, was related to the value that was initially labeled as “Acceptance and Diversity.” The feedback and discussion around this value focused on the lack of the term “Inclusion” or “Equity” and that by instead linking diversity with “Acceptance” it downplays the importance of inclusion and equity in relation to diversity. The argument was that in OD we believe diversity should not just be accepted but championed through inclusion and equity-generating actions and decision. Based on this feedback we removed the term “Acceptance” and made the value simply “Diversity.” Other major feedback we received was about better highlighting the interconnectedness of the values. Specifically, some values needed to be taken together to fully capture how OD would make choices and behave on a given topic. For example, the three values of “Collaborative Engagement,” “Diversity,” and “Trust & Respect” needed to be taken together to capture the OD value that underpins our belief in the importance of diversity, equity, and inclusion. Therefore, we modified the depiction of some values in a way that displays related values next to each other to make clearer how values built on each other to create the whole. Lastly, the OD Gathering participants noticed a pattern in the values. They identified



Figure 2: OD Value Model: Nine Core OD Values from a Future-Oriented Perspective

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that some values applied more inwardly towards the OD practitioner or researcher and some applied more outwardly towards the client. To respond to this observation, we created a visual that displays the values in concentric circles that will be addressed later in this article (Figure 2).

Next Steps and Applications

We identified numerous ways to use the OD values and how to apply them in OD practice and beyond. All nine OD values should be applied collectively to fully capture what underlies OD practitioner and researcher’s choices and behaviors. The nine core OD values apply at all levels of the system including, self, dyad, group, organization, society, nation, and global levels.

We created a visual model to best summarize and display the nine core OD values using two circles—inner and outer

(see Figure 2). The inner circle depicts the values that orient more frequently toward OD practitioners themselves. The outer circle depicts the values that orient more frequently towards interactions with others including co-workers and clients. These concentric circles in the OD Values Model serve only to enhance the understanding of the user in the primary ways to apply the values. We want to emphasize that while there may be an inward or outward lean to some values, all values can be applied both inwardly and outwardly to guide OD practice. For example, a person can use “Strategic Practicality” which is in the outer circle, for self-management. Likewise, a person can champion “Courageous Leadership,” which is in the inner circle, with the client to help them call out and address injustice. We will need to conduct further research to fully explore the interconnection between the values to build up the OD Values Model and enhance its application.

Table 3: Examples for Applying OD Values

Actors	Key Application Ideas
OD Educators and Researchers	<ul style="list-style-type: none"> • Use it to distinguish what makes OD different from other practices • Use it as a basis for comparison to actual OD practice • Conduct research on to what extent these values make OD practitioners and organizations more effective • Embed the values in every OD class and model the values • Discuss the values along with OD definitions and competencies with students and OD practitioners • Use the values as a guiding filter for making a decision on the types of research and the way research is conducted
OD Practitioners	<ul style="list-style-type: none"> • Live and breathe these values to be an effective practitioner • Use it to communicate how the OD practitioner will work with the client, especially at the contract phase, and how OD is distinguished from other practices • Apply the values to the interactions with coworkers and clients • Use as a framework to conceptualize and market own OD practice • Use as a self-assessment tool to identify developmental needs • Raise questions about values that have been ignored at the individual, organizational, and societal levels • Share it with colleagues and partners to confirm alignment
Leaders	<ul style="list-style-type: none"> • Model the OD values so that members of the organization will know what these values look like • Identify values that help improve performance at each of the levels • Use it to support decision making and visioning • Confront where these values are not evidenced • Demonstrate them in organizational town halls
Other	<ul style="list-style-type: none"> • Use the values and behavioral indicators in a survey with customers or clients to see they are demonstrated by leaders, consultants, and organizational members • Use some of the values as part of performance criteria for employees • Demonstrate them in personal and family interactions as a parent, spouse, and friend • Use them to select and evaluate internal and external OD consultants

We envision the OD values to be useful not just to OD practitioners but to anyone seeking to practice OD. To support this broader application of the OD Values Model, we collected application ideas, through a webinar, for the following key

stakeholders: (1) OD educators, (2) OD practitioners, (3) leaders, and (4) other. *Table 3* shows a summary of the results from this webinar. Three salient themes arose in the results. First, we as OD practitioners should seek to apply these values

and behavioral indicators on ourselves first, and then exhibit them while interacting with others. Second, the OD values are relevant to many aspects of our lives, not just in our work. Therefore, we can seek to model the OD values in everything that we do as a person, educator, researcher, consultant, leader, and even as a parent or friend. Third, the behavioral indicators associated with the values will help us clearly articulate, understand, and practice OD values. Many participants expressed an interest in explicitly applying these values in how they practice OD with clients and within their own organizations. Given this interest, a future research area can explore the effect of applying the OD values on organizational performance. Results of this type of research can provide a strong rationale for benefits of OD in organizations.

Interestingly, numerous ideas arose around the concept that the nine OD values are relevant for all organizations, teams, and leadership practices. A few respondents shared application ideas for the nine OD values in this broader application context:

- » Use the values to assess corporate culture
- » Incorporate the values in the strategic HR dimension and day-to-day interactions with manager and executives
- » Help organizations embed the values into management systems to make them real
- » Motivate and mentor teams to live and breathe these values

While in some instances these may be appropriate uses of the OD values, we feel it is important to note some distinctions. Practicing OD, whether we are in the role of an OD consultant or an OD-centric professional, means we should demonstrate these values in how we interact with ourselves and others. However, exhibiting these values ourselves does not mean it is appropriate, or best, for our clients or organization to hold our same values. The discussion of the validity of applying OD values in the context of the benefit on society and organizations at large is outside the scope of this article.

Conclusion

In conclusion, the OD Values Circle, through the support of the OD Gathering organizers and participants, were able to gain consensus on nine core OD values that will help guide the practice of OD in the future. These values and the associated behavioral indicators provide a practical model to help future OD practitioners and researchers, as well as leaders or other professionals, bring the values of OD into their work and life. Having a common understanding of OD values that does not rely on the traditional jargon, which prevented translation of the values outside of the OD field, helps make OD more accessible and applicable to a broader and more diverse group of people. Our research and results demonstrate the power of OD values and can serve as a foundation to help drive the impact of OD on the world and into the future.

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*Denotes Circle Leaders

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THE OD
GATHERING
2017-2019

“Over the past 30 years, the field has seen the dispersion of core OD principles into an array of diverse approaches, some of which build on and others which move away from the early coherence of the field. This has created a tension around defining which are ‘legitimate’ OD practices...”

What Capabilities are Needed in the Practice of OD in the Future?

Report on the *Capabilities* Circle of Work

By Todd L. Matthews,
Anne L. Clancy, Neha Ghadge,
Rosa Colon-Kolacko

Introduction

The three OD Gatherings held in 2017–2019 resulted in Circles of Work that address four main aspects of interest to the field: (1) the essence, vision, and critical needs of OD; (2) OD values; (3) definition of OD; and (4) OD capabilities. The purpose of this article is to describe the work done by an eclectic group of interested OD scholars, researchers, academicians, practitioners, writers and activists who came together at the 2018 OD Gathering to address a significant question for the future of OD:

What critical competencies are needed in the practice of OD for the future?

This question arose given concerns held by many participants at the Gathering about the viability of OD as a profession moving into the future. Over the past 30 years, the field has seen the dispersion of core OD principles into an array of diverse approaches, some of which build on and others which move away from the early coherence of the field. This has created a tension around defining which are “legitimate” OD practices and has led to a fragmentation of the field, especially from the perspective of new generations of OD professionals. Would a coherent set of OD competencies help bridge the tensions and divisions in the field? This is what the Competency Working Circle set out to discover.

In the process of doing the work, the group shifted the concept from “Future

OD Competencies” to “Future OD Capabilities.” This had been the source of much debate amongst the Circle for months, as some members argued that Competencies were too prescriptive and/or constraining upon OD practice, while others maintained that true Competency work such as that done by related organizations like SHRM and ATD was much more extensively researched and vetted before it was finalized. The final resolution was that the Circle Team believed that “Future OD Capabilities” is a better descriptor of what was developed. The term “capabilities” is drawn from the capability approach developed by Amartya Sen and Martha Nussbaum and refers generally to “what individuals are able to do.”

The Result

The revised and finalized Core OD Capabilities for the Future include the following six items (the list includes definitions and a brief behavioral indicator example to highlight possible aspects of how this can be put into practice):

1. **Develops and maintains an enhanced and reflective use of self**—drawing on the work of Jamieson, Auron, and Schectman, this is defined as “the conscious use of one’s whole being in the intentional execution of one’s role for effectiveness in whatever the current situation is presenting.” **Behavioral indicator example:** *Able to identify own emotions, biases, and assumptions, and use them as a source of information and motivation.*

2. **Embraces diversity and develops cultural competence** to practice and support inclusivity and equity across all settings and levels of system at all times—engages in the creation of opportunities and the overcoming of systems, structures of bias and inequality to support the development and equal access to opportunities to all individuals and social groups. This includes leveraging all differences, similarities, related tensions and complexities to create an environment where everybody feels valued, respected, appreciated, and

example: Knows and can apply various decision-making approaches.

5. **Understands and applies relevant theories, concepts and methods**—has the knowledge and ability to apply existing and emergent theories, concepts and methods from relevant disciplines and fields. **Behavioral indicator example:** *Knows the difference between sound and pseudo research practices and can appropriately implement them.*

6. **Utilizes existing and emerging tools and technologies** for practice—can learn and implement various tools and

cultural fluency; enhanced use of self; and an integrated cross-disciplinary approach. The group also agreed that each of the competencies should be overlaid by a professional’s level of tech savvy, a commitment to ethics and a systems perspective. The group developed some core assumptions about the topic to help frame the discussion and generated a picture of what the OD competencies would need to tackle in the future—namely, a world that is becoming increasingly virtual, chaotic, complex, ever-changing, and reliant upon a sophisticated understanding of group dynamics.

Regular virtual discussions via Zoom took place roughly every three weeks for 1–2 hours throughout most of 2019 to review and finalize a list of core competencies that would be presented at the December 2019 OD Gathering. The framework of these discussions was initially divergent to ensure the competencies would be based on current and past research, matched anticipated future megatrends, and incorporated key needs and opportunities that OD could help address for a positive future impact. Side discussions ranged from the question of OD certification to identifying an OD body of knowledge needed for the future.

The discussions gradually converged along specific pathways that the group considered to be the most helpful in moving forward in a meaningful and timely manner:

1. Identifying future megatrends that the competencies would need to match. These are discussed in more detail in the next section.
2. Delineating OD needs and opportunities in the future. These were identified as: navigating speed of change; enacting clarity of principles, purpose, and values; fostering learning and development; adapting to technology; maintaining individual and group identity; promoting sustainability; influencing power dynamics; and aligning mission, vision, and strategy. Completing this task helped the group better frame the discussions.
3. Naming current and future stakeholders connected to or impacted by

Two primary outputs emerged from the research, dialogue, and deliberation conducted amongst the Circle Team—a list of what were termed “future Megatrends” that were believed to be key societal drivers of change impacting organizations and societies more broadly over the next 5–10 plus years; and the subsequent list of OD Competencies (re-named Capabilities) that were believed would best position practitioners of OD to engage in a world impacted by these Megatrends.

treated with equity; including addressing racial behaviors, unconscious bias, cultural sensitivity, knowledge, and managing team dynamics amongst diverse teams. **Behavioral indicator example:** *Is willing to work across cultures and is able to facilitate difficult conversations managing differences and/or charged group settings.*

3. **Utilizes systems thinking and flexibility** to support execution of successful practice—ability to support organizational efforts to maximize competitive advantage, differentiation, and value creation while fostering a climate of continuous assessment and adaptation to change **Behavioral indicator example:** *Knows and utilizes system and complexity theories for the benefit of the organization.*

4. **Skillfully engages, intervenes and facilitates** within and across systems and organizations—capacity to design, support, and (when necessary) lead efforts focused on organizational change and development. **Behavioral indicator**

technologies necessary to support practice efforts. **Behavioral indicator example:** *Demonstrated understanding of advanced technology such as AI, Robotics, Block chain, IoT, Big Data, and their potential influence on the client system.*

The list of capabilities was revised based on the feedback and then presented at the Academy of Management conference in August 2020 at a virtual meeting with over 100 attendees. They were well received. No further changes were made.

Our Process

At the 2018 Gathering, 18 participants began a discussion and formed a “Circle of Work” team to carry forward the effort. The group was tasked by the Gathering Leadership to attempt to identify 3–5 OD competencies for the future. The participants in the Circle brainstormed an initial list of general competencies: strategic acumen; skilled facilitation; emotional, social, and

OD. Stakeholders were first identified and then organized into groups of practitioners; academics; professionals focused on HR, talent, leadership, learning, and development, organizational, social justice, change and community leaders, and practitioners of organizational design. It was thought the competencies would need to be most relevant to these groups.

4. Defining the concept of competency, and ultimately shifting to the language of capability. This is discussed in more detail in the following section.
5. Recognizing that the list of capabilities would be primarily drawn from a North American perspective although efforts were made to be global in outlook.
6. Adding behavioral definitions to each of the six capabilities to connect the concept with its application.

To complete its task, the group necessarily had to limit the content and discussion of concepts. The following competency ideas were not discussed at the OD Gathering but the group acknowledged they were important to other researchers and OD organizations: history and evolution of organization development and change, ability to measure positive change, and integration of theory and practice.

Upon completion of a draft of the competencies that was “90–95% complete,” the work was presented to several audiences in Fall 2019 before a presentation to the full OD Gathering in Baltimore, Maryland in early December 2019. The presentation was followed by the opportunity to solicit small group feedback in a World Café format. The feedback themes included: shift away from the term “competencies” to the language of “capabilities,” adjust some of the descriptions in the behavioral definitions, separate one of the capabilities into two separate ones, further clarify the competency of strategic acumen, broaden the competency of skilled facilitation, create a new definition for inclusion and equity, address whether the competencies will translate globally, reflect on the role of ethics, and speak to how the competencies might be affected by the issues of

standardization and the tension between curriculum/theory and practice.

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Several definitions of Megatrends and past research on this topic was reviewed by the team. Ultimately the working definition of Megatrends utilized involved: “a set of global, sustained macroeconomic forces that 1) are nearly impossible to reverse; 2) significantly influence the future; and 3) have far reaching implications on businesses, economies, societies, cultures, and personal lives.” After considerable deliberation, the four Future Megatrends that were delineated by the Circle Team included:

1. Emerging Technologies—including those in the continuing digital revolution; wind and solar power; etc.
2. Power Shifts—foundational changes in economic, demographics, social justice, oppression, political and diversity inclusion and structures of inequality.
3. Sustainability of Organizations, Social and Natural Systems—inclusive of ecological sustainability particularly around climate change and other global environmental challenges, but also addressing cultural competence, organizational and societal sustainability in a destabilizing and decentered world.
4. Individual and Organizational Risk and Security—concerns around issues ranging from terrorism, espionage, cyberdata security and privacy, and workplace/societal violence.

The Circle Team next worked on identifying 3–5 future OD competencies (numbers provided by the Gathering Leadership team as noted above), utilizing the Megatrends above as a background for where OD practice would need to move in the next years, and also after reviewing roughly two dozen

articles and book chapters that have been written in the field of OD and related fields over the past two decades. The Team used the commonly held definition of competency that centers around the relationship between knowledge, skills and abilities (KSAs) needed to successfully perform required tasks. This work resulted in five future OD competencies included:

1. An enhanced and reflective sense of self
2. An emphasis on Inclusion & Equity
3. Strategic acumen balanced with flexibility
4. Skilled facilitation abilities within and across levels of organizational systems
5. A diverse set of research skills, theoretical lenses, and tools for practice at their disposal.

After presentation of this work and the collection of feedback from events discussed in the previous section, significant revision of the language used to describe several of the competencies was undertaken, as well as the splitting and refining of the final competency into two separate items

Next Steps

To accelerate the next steps of the conversation about Future OD Capabilities, the Circle Team believes it is important to first focus on the important relationship between diversity and inclusion. Inclusive, diverse, and equitable organizations can inspire leaders and team members with possibilities and close the gap between aspiration and reality, and support the development of each of the future OD capabilities for the global workplace.

A holistic approach to diversity creates a new perspective for an individual to see new things and ideas beyond the demographic parity that enabled people to reach their full potential. Further, we have seen that high performing teams are both cognitively and demographically diverse. Cognitive diversity means the educational and functional diversity that helps an individual to solve the problem with the help of diversity in the mental frameworks. To listen to several voices and create a safe environment where every voice is heard and valued

The practice of OD has always been important as a means of directing organizational attention and activity towards more humanistic cultures, structures, and processes. That practice may be more important than ever today, in an age of societal, organizational, and interpersonal turmoil connected to global pandemics, health disparities, economic and education inequalities, the climate change crisis, systemic oppression and conflict along lines of race, ethnicity, gender, sexual orientation, and other aspects of identity, rapid technological change, and a myriad of other complex, often interlocking issues that demand working across divisions in the pursuit of our collective survival and flourishing.

is one of the dimensions in the diversity, inclusion, and equity framework where more work needs to be done.

While Inclusion is a priority, we need to also focus on building understanding of what is Equity—to have the ability to achieve the highest level of success, and health possible, regardless of who you are, economic status, and where you live. Many diversity programs failed to deliver on expectations, very often due to lack of partnership with leaders to translate inequities into goals, from increasing new jobs and succession planning to diversifying candidate talent pools. Hence, this can balance the action planning focus not only around inclusion and diversity, but also on developing equitable workplaces.

In addition, all of this work necessitates that individuals develop and maintain an enhanced and reflective use of self as described above, while simultaneously working to ensure that OD practitioners and their collaborators utilize systems thinking and flexibility as its foundation and in its execution. And of course, understanding and drawing on past and current theories, concepts, methods, tools, and technologies as appropriate is critical in this work. In this way, it is clear to the Circle Team that these competencies are inter-related and mutually reinforcing for OD practice.

Conclusion

While the multi-year project of the OD Gathering has been largely completed, inclusive of the Capabilities work described in this article and the work done by the other Circle Teams, the broader effort to ensure the vitality and viability of OD as an area of practice continues. As relates to the Capabilities we have outlined, it is our hope that this list serves as a solid foundation from which other work may be launched, in support of the important work that OD practitioners engage in across all types of organizations.

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will be a critical element to address the new megatrends, emerging businesses, and demographic needs.

In addition, this will contribute towards building a future-focused practice of OD that can play a bigger role in cultural and community transformations stimulating and fostering the dialogue necessary to leverage differences to build innovative OD interventions to grow and develop individuals and inclusive and equitable organizations.

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Note: A list of references, including the works referenced in the review of the past literature on competencies in OD and related fields, is available from the lead author upon request.

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