

Organizational Development and Social Change – A Practitioner’s Dialogue *OD Network Conference, 2005*

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When we try to bring about change in our societies, we are treated first with indifference, then with ridicule, then with abuse and then with oppression. And finally, the greatest challenge is thrown at us: We are treated with respect. This is the most dangerous stage.

-A.T. Ariyarante

Introduction

The purpose of the *Organizational Development and Social Change – A Practitioner’s Dialogue* session during the 2005 Organization Development Network (ODN) Conference is to stimulate and influence practitioners’ thinking about the boundaries, role, relationship and responsibility of Organization Development (OD) as a field, and individual practitioners, in advancing social justice through our interventions with nonprofit and for profit organizational systems.

The editorial board of the *Practicing Organization Development: The Change Agent Series for Groups and Organizations*, asserts, “OD is values-based system-wide process based on behavioral science knowledge. It is collaborative, and is concerned with the adaptive development, improvement, and reinforcement of strategies, structures, processes, people, culture, and other features of organizational life” (Hultman and Gellerman, 2002). Our roots are in the notions of human potential and development, empowerment equity, democratic processes and the importance of use of self as a key to the practice of OD. While many readers may find individual resonance with the values described, the field of OD has not ratified a single set of uniform values or ethical principles to guide the behavior of the professionals in the field; inform prospective clients what to expect; or establish ethical principles which are based on values shared by members of a profession (Freedman & Zachrisson 2001, pp. 181-182).

Understanding the Role of Values and Mental Models

Our highly interactive session assumes that participants hold a wide variety of visions and missions, personal and professional values that involve advancing more just, democratic, environmentally sustainable and humane organizations. As authors, when we think about the boundaries and context of the field of OD, we believe it is inextricably linked to advancing social justice, equity, democratic processes and empowerment values. We are clear that we work in the field of OD and capacity building in an effort to create a better, healthier society and improve the human condition. The mental model, which frames our role with our client systems is rooted in three commitments:

To support client systems in their efforts to become healthier; and

To increase client systems' consciousness about the historical context of societal –isms affecting their health, and

To increase client systems' ability and willingness to make choices that advance system health and promote social justice by recognizing the interconnectedness between the individual, organization and society.

During the session we invite participants to explore their mental models or “frames” in the context of their personal and professional values. Values are deeply held views of what we find worthwhile and what we hold as a compass for ourselves, regardless of whether or not we are rewarded. Mental models filter all external data and shape our understanding of how the world works and, like values, come from many sources, including parents, religion, race, age, gender, sexual orientation, class, experience, people we admire, and culture. Each of us subconsciously carries a repertoire of mental models based on assumptions, beliefs, perceptions and values, which shape the data we select, the interpretations we make and the conclusions we draw about the world moment by moment (Senge et al 1994, pp. 239-242).

None of us can experience any external reality without screening it through an elaborate set of internal mental and emotional filters that we bring to an experience in order to shape and give meaning to it. It is important to remember that most of us have only vaguely begun to realize what we can control. . However, we can begin take ownership and responsibility for the mental models we bring to life's raw material, the perceptions we select to view the experiences that form the cores of our lives, and the interpretations we give those experiences by making them explicit and in selecting only from those perceptions and interpretations that empower us in our never-ending efforts to define who we are, how we function, and how we will show up in our client systems.

During the session, we posit and test three mental models that we believe are currently shaping OD practice in the field:

1. The Neutral Consultant

This mental model assumes the role of the consultant is neutral and, therefore, values alignment is not discussed explicitly with the client system. The consultant may or may not be in agreement with the values of the client. The consultant may help the client system explore the extent to which it behaves in a way that is consistent with its own stated values.

2. Values-Based Consultant

This mental model assumes the consultant holds a set of professional values (such as employee involvement in decisions, performance-based reward systems) and initiates an explicit discussion during the contracting phase about the alignment of the consultant's professional values with those of the client. The client and consultant each assess the extent to which they are sufficiently well aligned to work together. While each may choose to adjust their expectations of the relationship in order to work together, either may decide the fit is not good. The

consultant may see acting on these professional values as distinct from acting on personal social, political, spiritual or other values.

3. Advocacy-based Consultant

This mental model assumes the consultant's personal and professional values are integrated with social justice values (related to issue such as worker's rights, pay equity, environmental protection) and, therefore, are explicitly linked to the consulting relationship. In the contracting phase, the consultant assesses client openness to addressing how internal business practices support or undermine social justice values in the client's workplace and marketplace. The consultant does not work with clients who they perceive to be actively subverting social justice in their business practices or do not demonstrate readiness to address such issues.

There may be other mental models, as well. For example, one hybrid mental model brought forward during the session is the idea of the "stealth" approach, where a consultant presents as a neutral or value-based consultant, and works within the client system to raise issues of social justice when the opportunity arises. Discussion also focused on the concept that these mental models may work more on a continuum, with elements from each brought forward at different times.

During the session participants identify their mental models in the context of their personal and professional values and to test if their espoused values are congruent with their behavior and actions with client organizations through exercises, self-reflection and dialogue. There is also an opportunity to explore the cost/benefit if they have co-opted their values or limited their ability to confront the enterprises they serve in order to remain marketable. The session provides opportunities for participants to identify mental models that better embody the roots of OD and how we individually and collectively continue to struggle with and explore what it means and looks like to truly walk our talk.

OD and Social Justice: Views from the Field

Our vision is of a world that is human-centered and genuinely democratic, where all human beings are full participants and determine their own destinies. In our vision, we are one human family, in all our diversity, living on one common homeland and sharing a just, sustainable and peaceful world, guided by universal principles of democracy, equality, inclusion, voluntarism, non-discrimination and participation by all persons, men and women, young and old, regardless of race, faith, disability, sexual orientation, ethnicity or nationality. It is a world where peace and human security, as envisioned in the principles of the United Nations Charter, replace armaments, violent conflict and wars. It is a world where everyone lives in a clean environment with a fair distribution of the earth's resources. Our vision includes a special role for the dynamism of young people and the experience of the elderly and reaffirms the universality, indivisibility and interdependence of all human rights - civil, political, economic, social, and culture.

--United Nations Millennium Vision, 2000

A review of dialogue on the ODN listserv indicates that participants share a wide range of perspectives on the extent to which justice issues are an appropriate dimension of the work of an OD practitioner. A few broad themes seem clear. Some indicate their work is in service of management and organization effectiveness and that justice issues fall into to areas that they do not believe ought to be part of workplace conversation, including religion, politics and other “sensitive” or “personal” issues. Others acknowledge that there may be implicit justice issues in both internal and external organization policies and practices, but sense that justice is so rooted in individual or community values outside the scope of business that the time and energy to arrive at alignment with workers or in the broader market place is a no win drain on resources. A related theme consistent with this perspective is that achievement of justice is not measurable.

Another set of themes on the ODN list shift the focus of this conversation to the nonprofit, NGO or government sectors. While acknowledging that some aspects of OD practice are the same or similar across all sectors, with variations related to organization size and level of overall development, some argue that working on social justice issues is the basis for a legitimate distinction in the practice of OD outside the business sector. Some comments stereotype those working in the nonprofit sector, especially on social justice issues, as people who let their values get in the way of good business judgment...essentially describing the sector from a deficit perspective. Alternatively, some look to the historic values of OD and sense that the field has lost its way.

These perspectives seem to implicitly position the practice and the sectors as being more or less businesslike. In doing so they also position the concept of businesslike as either the benchmark against which practice should be measured or the curse that is co-opting the field and undermining the health of our communities locally and globally. During the workshop we will explore a third perspective, one which will link the business case for social justice with the role of the advocacy organization.

Building on the work of Morton Deutch, as described by the contributors to Conflict, Cooperation and Justice (Bunker, Barbara, et al, 1995, Jossey-Bass), we propose a definition of justice that has the potential for measurement and can be linked to organizational performance. In particular, we will focus on Deutch’s three distributive justice principles, which “arise from these essential ingredients of organization:

1. Relative *equality* of distribution validates people’s feelings of full-fledged membership in a cohesive unit, whereas gross inequality can fractionate the organization (in essence, making it more than one unit, with sub-unit members who do not feel fully included in the whole).
2. *Equity* can foster the motivation to produce. Without rewards based on productivity, the motivation for productivity may lag.
3. Distribution of resources according to *need* ensures that the essential needs of all societal and organizational members are met.” (pp. 262-263)

The session will also explore the emergence of “the triple bottom line” and socially responsible business as a significant sector, not a quirky trend that will pass. We will also look into the challenges that occur when organizations choose a mission to serve marginalized populations, either as advocates or by providing direct services. In addition, we will explore the challenges such groups face when their missions relate to issues that society is more or less ready to address and how those challenges might be addressed by OD practitioners.

Organizational Development in Social Justice Organizations

A wide range of organizations are engaged explicitly in promoting social justice in a variety of ways – organizations focus on race relations, community development, economic empowerment, advocacy and policy change, etc. The Foundation Center and Independent Sector define social justice philanthropy as that focused on “work for structural change in order to increase opportunity for those who are least well off politically, economically and socially.”¹

Nonprofit organizations often make an unconscious distinction between the types of social change they are aiming to produce in the world “out there” and the types of organizational systems they create within. The challenge for OD practitioners who bring a social justice lens to their work is to help organizations understand the inextricable link between the decisions and processes they create inside the organization and the change they want to see in society. Whether organizations are themselves learning organizations, whether they solicit and value the input of staff and stakeholders, whether they are inclusive and culturally competent in their leadership and programs, the openness of their salary scales and chances for advancement – all of these internal decisions influence how the nonprofit employees and beneficiaries experience their world and sense of social justice.

In the nonprofit field, organizational development is considered part of, or a subset of the field of “capacity building.” The term *capacity building* includes OD, but also extends to other activities that strengthen nonprofit organizations and the nonprofit sector as a whole, such as training, grantmaking, research, publishing, and other forms of technical assistance such as technology, financial management, and legal advice.

Organizational development in social justice organizations is an area that has been the subject of research, most recently a major report on generational changes in social justice organizations has gained broad attention for its applicability not only in social justice organizations but across the nonprofit sector. The report by the Building Movement Project, *Up Next: Generation Change and the Leadership of Nonprofit Organizations* found that younger leaders share a strong commitment to mission, but often feel invisible or undervalued. Thus, as organizations try to achieve social justice in an external sense, they may have much room for improvement internally in making their staff and stakeholders feel fully valued.

¹ *Social Justice Grantmaking: A Report on Foundation Trends*; September 2005, The Foundation Center and Independent Sector

In addition, research has been conducted on capacity building in social justice organizations in the late 1990s by Ann Philbin, supported by the Ford Foundation. The research report, *Capacity Building Work with Social Justice Organizations: Views from the Field* outlined the definition of capacity building, characteristics of effective organizations and capacity building, as well as specific characteristics of capacity building with social justice organizations. Subsequent research underscored the findings of this report and extended their validity to the entire field of capacity building with nonprofits.

In Philbin's report, capacity building is defined as "the process of developing and strengthening the skills, instincts, abilities, processes and resources that organizations and communities need to survive, adapt and thrive in the fast changing world of the late 20th and early 21st centuries."

According to Philbin's research:

Practitioners identified ten central characteristics of a healthy organization:

- A clear and engaging vision, mission and values
- Strong leadership, governance and management
- Strong program development and implementation
- Connection to an involved constituency
- A commitment to developing its people
- A diverse funding base and strong financial management
- The capacity to form alliances with other organizations
- An organizational culture that promotes learning and development
- A commitment to planning and honest evaluation

Practitioners also agreed on some core components of effective capacity building work:

- A clear, cohesive theory of action
- Relationship-building
- Attitudes, structures and processes for learning
- Open, thorough and inclusive assessment
- Naming and addressing the organizational culture
- Understanding the mission, culture and political environment of social justice organizations
- Transfer of skills
- Merging the practical and the theoretical
- Peer learning
- Partnership among organizations, constituency, funders and practitioners
- Flexibility and the use of a variety of approaches

This and other research indicates that there is congruence between the characteristics of effective organizations and effective OD that correspond to fundamental values of social change and social justice.

In the nonprofit capacity building field, there are a range of organizations specifically devoted to strengthening social justice nonprofit organizations, such as the **Interaction Institute for Social Change**: a training and consulting organization that contributes to social change by guiding organizations in the social and public sectors toward becoming more participatory, just and high-performing workplaces, and **National Community Development Institute** that provides consulting and training to build capacity for social change in communities of color and other underserved communities in a culturally-based way.

Philbin's research points to special characteristics of social justice organizations, including a crisis orientation, a mission-driven culture, passionate but often inexperienced staff, and shifting external political environment. The research points to the importance of capacity builders with social justice organizations aligning with the mission of the organization so they "both understand the particular forces affecting capacity building work within this context and have the substantive experience that gives them credibility among social justice activists.

Pat Vivian and Shana Hormann's article on "Organizational Trauma and Healing" points to specific organizational development issues that are raised in organizations that deal with traumatized populations, such as battered women or homeless people (Vivian, Hormann, *OD Practitioner*, 2003). Some of these characteristics may also be present within a social justice frame, including chronically elevated levels of stress and hyper-vigilance. OD practitioners are encouraged to properly assess these aspects of trauma in the organization and seek healing avenues, such as finding hope in strengths, shining light on the "shadows" affecting the organization, keeping open boundaries with the outside world, and rewarding and celebrating creativity.

Importance of Cultural Competency

Cultural competency is an area of growing importance that has relevance both inside organizations and in creating social justice. Cultural competency is a concept that has been developed in the health field and is now gaining currency in nonprofit capacity building. It differs from "diversity" approaches in several key ways. While diversity focuses on ensuring that an inclusive mix of people are involved (for example, on boards, as presenters, as staff members), cultural competency goes further to look carefully at the organizational structures, power systems, allocation of resources, stakeholder involvement, promotion, etc., to move away from one dominant culture and create space for multi-cultural approaches to thrive. While diversity approaches tend to focus on interpersonal relationships, cultural competency looks at the dynamics of entire organizations and systems and the results they achieve.

Alliance for Nonprofit Management's People of Color Affinity Group defined cultural competency in capacity building as follows:

***Culturally competent capacity building** is a community-centered process that begins with an understanding of historical realities and an appreciation of the community's assets in its own cultural context. The process should enhance the quality of life, create equal access to necessary resources, and partner with the community to foster strategic and progressive social change resulting in a just society.*

Suggestions for capacity builders aiming to work in culturally sensitive ways were developed by Cynthia Parker, Omowale Satterwhite, and Makani Themba-Nixon.²

- Do no harm.
- Serve with excellence, mutuality and humility.
- Demonstrate reverence for human dignity.
- Model social justice and address issues of power and privilege.
- Include, collaborate, and ensure effective stakeholder voice.
- Value and celebrate differences.
- Build on assets and appreciate strengths.

The authors write:

Clearly, approaches to addressing issues of race, class, and power must focus on the people involved, honor their human dignity and create processes and norms that support full, broad-based participation. These principles and values are essential for the work of capacity building in a manner that addresses differences of race, class, and power. Moreover, since so much of the work involves helping rooms full of people find ways to listen to one another, learn from one another's perspectives and determine how to move forward together in the face of differences, a focus on listening, interpersonal interactions and group dynamics is warranted.

Conclusion

Given the current momentum surrounding the need for more sustainable business paradigms, this session focuses on building mental models that are based in systems theory, support positive social change, social responsibility, sustainability and factor in the implications of the increasing interconnectedness of everything and everyone due to globalism. We believe all OD professionals have an obligation to return to the basics of our field's commitment to humanistic and democratic principles. To do this, we believe we need to re-examine our roles as OD consultants and intentionally resurface and utilize the knowledge, values, strategies, methods and skills, which have evolved and served us well since the 1940's. Like our forebears in OD, we believe OD practitioners must work towards extending the values and ideals of democracy and positioning social science in

² Alliance for Nonprofit Management/National Council of Nonprofit Associations Joint Conference session, "Dialogue on Race Class and Power" proceedings prepared by Interaction Institute for Social Change.

its service. We can no longer afford to turn our collective cheeks from the direct assault on these core values, in exchange for a world organized solely on the financial bottom line.

There is an increasing amount of literature on issues of sustainability, and corporate social responsibility. Participants from a “Symposium on Sustainability – Profiles in Leadership,” NYC, October 2001 defined sustainability from a corporate perspective this way: “Company’s ability to achieve its business goals and increase long-term shareholder value by integrating economic, environmental and social opportunities into its business strategies.” As Meg Wheatley so aptly said “the skills and processes of OD are needed during this time, needed as they have never been needed. Who do we need to be, with what we know, during this time of planetary crisis? What is our purpose? What do we want to give voice to? Who do we need to be in this profession, at this time, in the world?” (Wheatley, Tannenbaum, Griffin, Quade 2000, pp.3). As OD consultants we must respect and honor the distinctive role that the founders legacy and their commitment to democracy has served in promoting democratic values, and build upon the principles of two of the architects of the field of OD, Kurt Lewin and Kenneth Benne. Benne’s epitaph states “...But if love glows among the ash of time where we kept watch together on time’s flame, save me from death, grant immortality. Remember me, my friends, remember me”. In the Jewish tradition it is said, “Never forget.”