EDGES

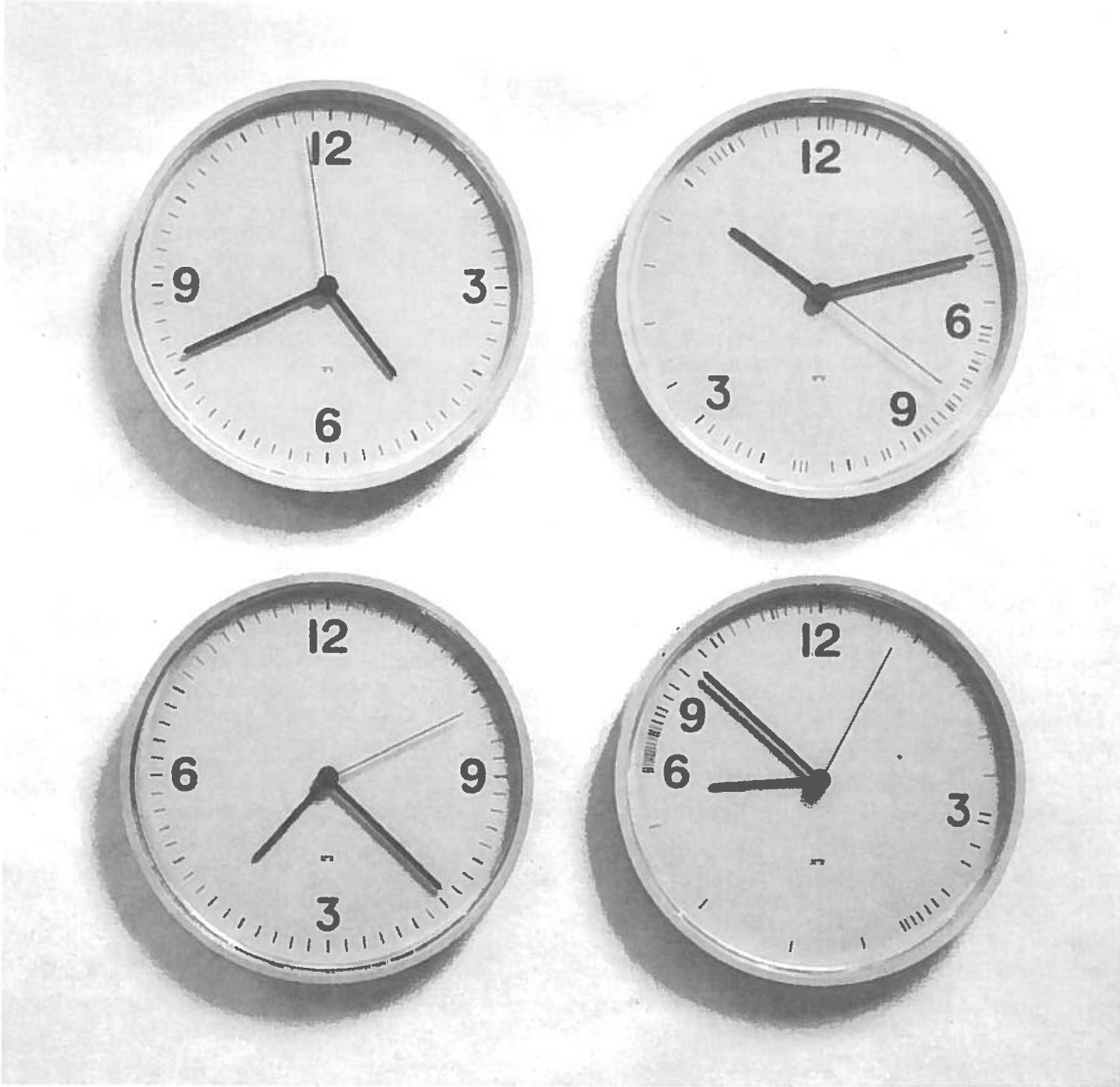## NEW PLANETARY PATTERNS

CILDO MEIRELES, Fontes, 1992. Installation, documenta-Halle, Kassel.

Mapping Organizations

Everyone wants a better organization. What does that mean?
What would you see if you saw an organization getting better?

"One of the characteristics of the Journey to the East
  was that although the League aimed at quite definite,
  very lofty goals during this journey...
  every single participant could have his own private goals.
  Indeed, no one was included who did not have such private goals,
  and every single one of us, while appearing to share common ideals
  and goals and to fight under a common flag,
  carried his own fond childhood dream within his heart
  as a source of inner strength and comfort."
  Hermann Hesse: *Journey to the East*

Mapping the Journey of the Organization

BRIAN STANFIELD

Organizations, leaders and their workforces are on a journey. Some companies consider this development to be intrinsically bound up with the profit motive, and the satisfaction of shareholders. To this end we see many companies put themselves on the tortuous racks of downsizing, right-sizing, consolidating and re-engineering with a view to maximizing the profits and keeping the shareholders happy. In these measures both the expenses and the staff morale are generally axed. Meantime, workforces slide into a terrible "who's next" anxiety and despair.

Other less dramatic approaches at changing organizations have been tried in the attempt to transform one aspect of the organization in the hope that this will generate a ripple effect through all the other systems. JoAnne Raynes, a trainer at one of Canada's main banks, says: "These 'silver bullet' approaches have often put the entire burden of organization renewal on one such dimension. Familiar examples include total quality management (TQM), inventory control (JIT), continuous improvement, team building, process re-engineering, and customer service. Although each of these interventions has its own merit, most likely no single initiative can achieve broad organizational change." CEOs often know this, but are persuaded to take on silver-bullet strategies against their better judgment by promises of higher salaries, stock options, and other "perks".

Silver bullet strategies inevitably fail to fulfil their promise of all-round transformation. To change an organization means changing the whole network in its multitude of dimensions —a process that has been called "whole-system transformation." A first step in this wholistic change is transforming the organization's current paradigm or world view. In this understanding, the first thing an organization must first clarify is the understanding out of which it operates. Then it must create the consensus to choose a new and desired paradigm.

When the image shifts the priority values shift. It is not simply the focus, structure and leadership of the organization that change, but the core values, skills, and operating style.

To choose a new paradigm, an organization needs a vision. It needs an image not just of greater size or profitability, but of higher maturity and fulfilment. It also needs a way to see where it is stuck at present, and an overview of the whole journey of possible development.

Over the past two decades, many business leaders and teachers have contributed to an emerging vision of human potential in organizations. In *Reflections on Leadership* Richard Smith describes the shift between the mechanical model of the organization based on the pyramid and the emerging models based on circles. Some other mentors and models for new-paradigm organizations are Peter Senge's learning organization, Russell Ackhoff's systems, Robert Greenleaf's servant leadership. The foundations of some models lie in the sciences of quan-

tum physics, self-organizing systems, and complexity theory.

Recently people who study and consult with organizations have been working hard to understand not only the value scales of different organizations, but also their life journeys as they evolve in structure, leadership, workers, values and skills. Four authors especially relevant to this articles's map of developmental phases in organizations are:
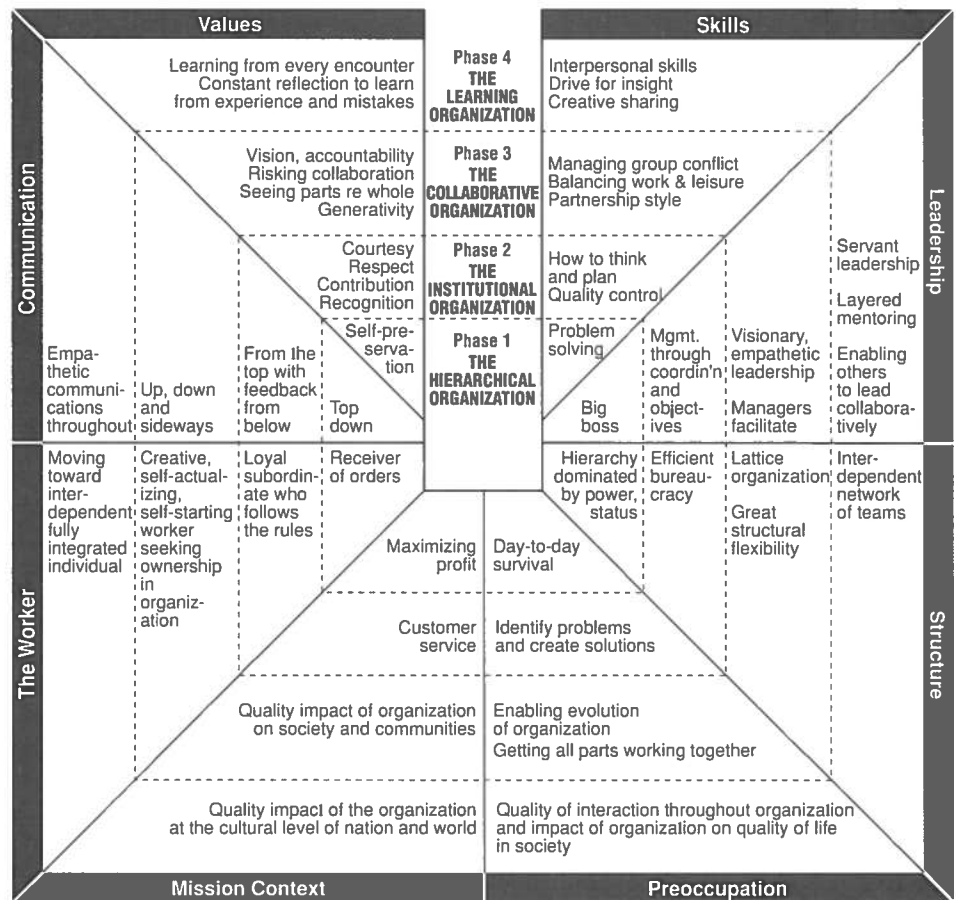
1. Harrison Owen in his book, *Spirit: Transformation and Development in Organizations*, describes organizational development as a journey of the spirit where the organization transcends itself into successive new orbits. His five stages of development are based on management styles: reactive, responsive, proactive, interactive and inspired.

2. Willis Harman and John Hormann, in *Creative Work: The Constructive Role of Business in a Transforming Society*, work with a system based on four stages of evolution: the reactive, responsive, proactive and "New Paradigm."

3. ICA Taiwan consultant Dick West uses a similar four stage image of development. He then maps out the implications of each phase in terms of values, contexts, skills, preoccupations, styles of leadership, structure, communication and worker relations. He uses the resulting chart to help clients plot their own next steps.

4. Brian P. Hall, throughout his 30 years of research into human values and organizational development, has explored the phases of the spirit journey as described by students of Eastern and Western mysticism such as Evelyn Underhill, Ken Wilber and Jean Houston. He has also studied the maps of human development created by psychologists such as Freud, Kohlberg, Piaget and Ericsson. Hall then sought to apply his understanding of developmental phases not just to individuals but also to whole organizations. Out of all this he sees seven "cycles" of organizational development.

This article draws from all four of these sources, while simplifying the description of the evolutionary phases. Each phase is described using West's categories of major preoccupation, mission context, worker image, communication, values emphasis, skills, leadership and structure. The result is a rounded picture of how organizations operate at each stage of their evolution.

Values

				Phase 4 THE LEARNING ORGANIZATION	Skills

Learning from every encounter / Constant reflection to learn from experience and mistakes — **Phase 4 THE LEARNING ORGANIZATION** — Interpersonal skills / Drive for insight / Creative sharing

Vision, accountability / Risking collaboration / Seeing parts re whole / Generativity — **Phase 3 THE COLLABORATIVE ORGANIZATION** — Managing group conflict / Balancing work & leisure / Partnership style

Courtesy / Respect / Contribution / Recognition — **Phase 2 THE INSTITUTIONAL ORGANIZATION** — How to think and plan / Quality control — Servant leadership / Layered mentoring

Self-preservation — **Phase 1 THE HIERARCHICAL ORGANIZATION** — Problem solving / Top down — Mgmt. through coordin'n and objectives / Big boss — Visionary, empathetic leadership / Managers facilitate — Enabling others to lead collaboratively

Empathetic communications throughout / Up, down and sideways / From the top with feedback from below

Communication / **Leadership**

Moving toward inter-dependent fully integrated individual / Creative, self-actualizing, self-starting worker seeking ownership in organization / Loyal subordinate who follows the rules / Receiver of orders — Hierarchy dominated by power, status / Efficient bureaucracy / Lattice organization / Great structural flexibility / Interdependent network of teams

Maximizing profit / Day-to-day survival

Customer service / Identify problems and create solutions

The Worker / **Structure**

Quality impact of organization on society and communities / Enabling evolution of organization / Getting all parts working together

Quality impact of the organization at the cultural level of nation and world / Quality of interaction throughout organization and impact of organization on quality of life in society

Mission Context / **Preoccupation**

Working Draft, not for reproduction.

Map of the Journey of Organizational Development

How to Use the Map

1. Read the map and the whole article.
2. Check on what you are not clear (get in touch with the author if necessary).
3. Use the map to reflect on other organizations asking: What companies or organizations were you reminded of as you read this? Where would you place those companies on the map?
4. Plot your own organization on the map (or an organization you are familiar with). Look at each piece of the pie (Structure, Leadership, etc.) and see which description best fits your organization. Note your observations—What dynamics do you discover? What surprises you?
5. Plot yourself in relation to the organization on the map. Which descriptions best describe the way you operate in the organization? Note your observations—what dynamics do you discover? What surprises you about your role?
6. Plot someone from your organization on the chart. Which descriptions best describe the way they operate? Note your observations— what dynamics did you discover? What surprises you about their role?
7. Ask yourself what is helpful about the chart. What new insights did it provide you?
8. List what next steps this exercise suggests for you, and for your organization?
9. Discuss how you could use this chart. In what situations? To do what?
10. What is missing from the map? What would make it more clear?

Sources

Owen, Harrison , *Spirit: Transformation and Development in Organizations*, Abbott Publishing, Potomac, MD, 1987.

Harman, Willis and Hormann, John, *Creative Work: The Constructive Role of Business in a Transforming Society* , Knowledge Systems, Inc., Indianapolis IN, 1990.

Dick West, "Organizational Analysis" ; Manuscript diagram, ICA Taiwan.

Hall, Brian P., *Values Shift: A Guide to Personal and Organizational Transformation*, Twin Lights Publishers, Rockport, MA, 1994.

Raynes, JoAnne, *The HALL-TONNA Inventory of Values* , CIBC Leadership Centre, Toronto,1996.

The Four Developmental Stages of the Organization

Phase 1.
The Hierarchical Organization

Leadership in the hierarchical organization operates in the style of benevolent paternalism. Orders and incentives come from the top down. Management may believe in spending time listening to what subordinates say, but this feedback is commonly ignored in the real process of management. The worker is imaged as a child who is cared for by a fatherly leader, and who, by following the rules and working hard, can win favour in the organization. The top-rated skills involve problem-solving, administrative effectiveness and "keeping calm." Basically, this style is reactive. The main agenda is responding to problems and crises as they occur. A major preoccupation of management is keeping labour submissive, which may involve discouraging unions. Harrison Owen in his book, *Spirit,* has a telling description of the reactive organization: "It doesn't seem to make much difference what you do, just do something: react. Things get done but what things and to what purpose is not always clear." Overly zealous accountability means the workforce sees keeping and looking busy as a prime value.

One gift of hierarchical organizations is their capacity to ride out storms and survive—witness the religious orders of the Roman Catholic Church. Another gift is their obvious structure of management and accountability. Such groups exhibit vulnerabilities such as the failure to use the intellectual capital and creativity of their staff, and setting priorities by crisis rather than vision.

It is worth noting here that "hierarchical" refers to a style of top-down communication where staff/worker participation is minimized, while the status and power of top management are maximized. This style does not automatically flow from all hierarchical structure, and hierarchy in an organization is not, *ipso facto*, bad.

Phase 2.
The Institutional Organization

While the hierarchical organization at its worst is characterized by the "big boss" style and the crisis mode, the institutional organization is a miracle of organization. There are the board of directors, the shareholders, the CEO, the vice presidents of this, that and the other, the managers, the supervisors, the workers. This is the large, efficient bureaucracy. Its style is that of responsiveness. As Harrison Owen remarks, this kind of organization "is truly a pleasure to work with, for they seem to recognize what the business is, and are prepared to go all the way to ensure that you, the customer, are fully met, even if they do not understand all the details of the operation."

This organization is preoccupied with customer service. Communication is from the top, but informed by feedback from below. The mode is task-oriented and output-focused. This is the kingdom of the team, quality control and management by objectives. The bureaucracy works well, as a carefully designed clock works well, but the work is clockwork, and the universe is Newtonian. Loyal subordinates know their functions, but often find themselves acting out the same scripts for every performance. Brian Hall remarks that, in spite of incredible loyalty to their workers, most Japanese corporations tend to be stuck on this level.

The gift of the institutional organization is the gift of the Newtonian universe: great order, great predictability, great loyalty to staff and to customers. The responsiveness to clients is rapid; responsiveness to social change is glacial. Attempts to change the organization bog down in a morass of business as usual.

The shift from an institutional style (phase 2) to a collaborative style (phase 3) really involves a whole-system transition which happens only over time.

Phase 3.
The Collaborative Organization

If the first two phases were primarily concerned with the patterns of power relations, profit, efficient production and customer service, the preoccupations of the last two phases are with maximizing vision, creativity, interaction, communication and collaboration. If the first two phases are all about structure, the last two are more about process, though structure remains important.

Interaction is the core characteristic of the collaborative phase. These organizations aim for real teamwork between all members and departments. Their mission is to make a quality impact on society. Structurally, this is a lattice organization. All the parts are integral to the whole, and no part may be replaced without altering the whole. They are concerned about reducing rigidity, and increasing the flow of creativity. This type of organization has great structural flexibility. The leadership is enthusiastic, visionary, empathetic. Their management style is facilitation. Key skills at this level are delegating responsibility, managing group conflict, balancing work with leisure; growing from experience, and helping others do the same. Management may even conduct humour workshops, to help the staff laugh at their mistakes rather than feel defensive. The main difference between collaborative and lower-phase organizations is the free flow of ideas. Management is more concerned about stimulating creativity than preventing unauthorized action. Communication is up, down, and sideways. People talk about how to make the institution more humane. The staff are self-actualizing, and seek to serve society through their work.

The gifts of this situation are obvious: synergy and alignment between the parts of the organization, and a mission related to social service. The danger occurs when the organization begins to image itself as one big happy family and staff trust and enjoy one another too much to really hold each other accountable. In that case, management must restore due balance between the needs of internal clients, and the objective requirements of external clients.

Phase 4.
The Learning Organization

The learning organization is blessed with a high degree of interactive learning, an emphasis on human resource development and concern with "making a difference." To some extent, the organization itself becomes a message to the world, offering its own vision of human relations for the future. This phase involves a new take on "quality" and "learning". The learning organization is necessarily a network, made up of self-directed teams. Using the model of servant leadership, the leaders quietly enable others to maximize their performance through a system of layered mentoring. The quality of communication is empathetic throughout. The worker is a

microcosm of the organization, and is encouraged to assume responsibility for the whole, beyond his or her job description. Outside involvement in the community and personal growth are encouraged as relevant to the organization's vision.

In such a team, every encounter is regarded as a learning situation. Interpersonal and reflective skills for gaining insight are crucial here. A core set of values is built or changed by consensus. A superb flexibility enables the organization to deal with rapid change.

Unlike the single-minded focus on a bottom line, or the single programme of a silver bullet, this vision of quality involves balance. The organization works to perfect a juggling act, honouring the needs of the person, the group, and the greater community.

The danger at this phase is a collapse of structure in favour of "networking." With limited structure consensus is more difficult to create. Accountability can slip, and with it, quality work.

The Map of Organizational Development

The diagram above shows a map of this journey, which can serve as a tool for organizations to reflect on their own goals. Below the diagram is a step by step process for using the map as a reflective tool. This diagram has been used in a variety of consulting situations, and an number of common misunderstandings have come up. The following notes attempt to clarify the uses and limitations of this map. This enables individual managers or working teams to think about their own operating styles, and what next steps may be appropriate for them.

Notes about the Map

1. On viewing the map of organizational development, some managers mistakenly assume it is possible to shift quite directly to another level. Of course it is never so clearcut. Organization cannot make such neatly defined changes overnight and in toto. What is feasible is for a few people to share a vision, and prefigure a future style in their own work. Such an example of a better way can gradually shift how the whole group does things. One fine day, the organization wakes up to realize that things have changed.

2. Since some people will always respond to change faster than others, the organization is bound to be spread over two or more phases. The map is, therefore, not meant to be used as a static model. Organizations tend to evolve more in some arenas than others. A team will be at different stages in different areas, and at different times

3. It stands to reason that if the leadership is not at least a stage ahead of others in the organization, there is not much real possibility for development. Somebody has to be ahead of the game. However, leadership understandings and values may be ahead of their skills. As an organization begins to push into a new phase, images and understandings may change rapidly, but the skills which belong to that phase still take time to develop. Only after the new skills are mastered can the organization begin to live and operate on a higher level.

4. The order of stages in this model does make it clear that a hierarchical organization doesn't have much chance of changing directly into a learning organization. After seeing this model, one consultant remarked a client of hers was obviously three stages away from becoming a learning organization. She therefore tailored her recommendations for that client to building better bureaucratic systems.

5. *Edges* would welcome any feedback from readers on this journey map. Please reply with any comments on applications, any problems using the model, or any observations on what is missing. ❖

Social Research Book Review Project

WAYNE NELSON

The ICA book review project is a participatory research effort to discern social and spiritual trends. By pooling and focusing many minds in study, we can gain invaluable overviews of recent thinking from around the world.

Since the 1960s, the ICA has built all its programs through similar participatory research efforts. In 1971, for example, a vast network of people was involved in a major book reviewing effort in preparation for a research assembly. This knitting together of minds produced the "Social Process Triangles," which have served as a diagnostic screen for ICA community and organizational services ever since.

In the current research effort, we will gather both grassroots wisdom from personal interviews, and systematically researched data from books or articles.

The design of this project calls for many participants to screen several books each on specific arenas of the Social Process. Each book screening will be reported on a common form geared to the needs of the Social Research Project. We are seeking a comprehensive listing of key books that can be farmed out to volunteers for review.

Our first aim is to collect authors and book titles. Please note:

1. We are interested only in books published in the last four years.

2. We want to include both Canadian and international books.

3. Within Canada, we want to include Native and Québec authors.

4. Key papers or articles related to the screen are also important.

5. We want to encourage participants to talk to other people about key books in their field.

6. We will start by compiling a book list. We are aiming at around 250 books, spread across the following categories:
- Economic processes: 50 books
- Political processes: 50 books
- Education processes: 50 books
- Style processes (kids, adults, elders, sex, families, societal groupings and communities): 50
- Symbolic Processes (language/communication, arts, religion): 50 books

Please send in your selections by e-mail, fax, ordinary mail, or phone. Address to the attention of Brian Stanfield. ❖

BOOK REVIEW

Beyond Prince and Merchant:
Citizen Participation and the Rise of Civil Society

edited by John Burbidge for the Institute of Cultural Affairs International, PACT Publications, New York, 320 pages, 1997; ISBN 1-888753-09-9.
Available through ICA Canada. Price $41.95 + 3.50 S&H + 3.18 GST

The concept of a "civil society" is not new, but has clearly been reenergized in the '90s. Its origins date from the 18th century, and over time, it has been used to describe free societies where government, economic and cultural institutions are balanced, with no sector dominating the others. Around the world we see a growing demand for such balance, as people call for a greater say in controlling their destinies, require greater accountability from governments, and challenge the growing power of international corporations.

Written by practitioners and academics who are striving to create a global civil society, this book describes the challenges confronting civil society, and provides inspiring examples of how these challenges are being met. According to Robertson Work of UNDP, "This extraordinary book provides a wealth of insights about the role of civil society in achieving sustainable, people-centred development through mechanisms and process of good governance."

Part I of *Beyond Prince and Merchant* deals with the origins and challenges of civil society. Part II explores the global mosaic of civil society as it appears in many regions, including the Arab World, the Balkans, Romania, rural Ethiopia, or city neighbourhoods in North America. Part III deals with the new sectoral frontiers of civil society in local community, small business, or networks concerning women, young people, health, or religion. Part IV concerns the future directions for civil society, and Alan Atkisson explains why civil society will transform

With authors from several cultures, *Beyond Prince and Merchant* gives a global view of society beyond control by governments (the prince) or business (the merchant). This book shows community emerging as a third force, with which business and government must deal. Instead of describing globalization as a spread of homogenized institutions, this book shows vivid pictures of flowering civil societies, each with a unique balance of institutions and values. ❖

—WAYNE NELSON

For ICA members

EDGES
NEW PLANETARY PATTERNS

Associate Facilitator Program

TWELVE people are now enrolled in the Associate Facilitator Program. In July a two-day AFP Intensive brought trainees together to push themselves into a new orbit of expertise. We are working toward a clear set of facilitator competencies and performance indicators. This is a program that is worthy of your serious consideration. There is a clear model, but the program is also tailored to meet your needs. It can be as big and complex or small and simple as you need it to be. Please call for further information.❖

ICA Annual General Meeting

ICA Canada's AGM will be held on April 26, 1998. All members are invited. It promises to be a great day of creative thinking about the future. Under the canopy of ICA's Social Research Project, participants will be engaged in a major scenario-building workshop on Canada's future. After lunch, members can participate in the 30-minute Board meeting. The Board will give a presentation on future directions of the ICA, and then conduct a scenario-building workshop on the future of ICA Canada. The AGM will be held at the ICA office, 579 Kingston Rd., Toronto, near the corner of Main and Kingston Rd.❖

Facilitators' Conference

We welcome your input on the 1997 ToP™ Facilitators Conference, 18-19 October, 1997, the third in this series. This is a place for mediators and facilitators to share their breakthroughs, to sharpen up their methodology, and to expand their context as change agents.

This year, again, we ask for your input. What topics should we include? We are giving serious thought to focusing the conference on the spiritual aspects of facilitation. What do you think? Please let us know. ❖

Discuss Facilitation by e-mail

An electronic mail discussion group has been operating for over a year now for exchange of news, ideas, and information. Members of ICA Canada can join by contacting Niky Melichar at McMaster University, who will forward the procedures for registration and participation.
E-mail: melich@fhs.mcmaster.ca
Tel.: (905) 525-9140

Fax: (905) 528-8539
Mailing Address:
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Hamilton, ON, Canada L8N 3Z5

Social Research Probe

ICA Canada's social research project continues with monthly meetings to explore "indicators of social change" and seek funding sources for a cross-Canada social research program. This month, through *Edges*, the group is launching a book review plan. The intent is to get a broad overview of current leading-edge books and articles to get a global perspective on emerging social trends. A summer student, Sara Goldman, has been hired by ICA to bring social research data from many sources into one database of indicators of social change.❖

Other On-line Facilitator Home Pages

ICA Canada: www.web.net/~icacan
ICA International: www.icaworld.org/
Facilitator Central: nsb.baylor.edu/fuller/fac/
Newsgroup: misc.business.facilitators
International Association of Facilitators: hsb.baylor.edu/fuller/iaf/

The Golden Pathways CD-ROM is now available for CDN$200 or US$150. It features over 1000 of ICA International's most illuminating archival documents. Quantities are limited. Order by phone, fax or email from ICA Canada. ❖

1997 Membership renewal is $50 and lasts for a year from the date of payment. Please renew yours, today.