
Marvin Weisbord: A Life of Action Research

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Abstract

Marvin Weisbord's work – as professional author, business executive, organizational consultant, researcher, Future Search method founder, and cofounder of its global network – spanned 50 years. He was a partner in the esteemed consultancy, Block Petrella Weisbord Inc., and he was a prolific writer and thinker, as well as practical craftsman, in the field. He is widely known for his multi-edition, *Productive Workplaces: Dignity, Meaning and Community in the 21st Century* (2012), chronicling the history of organizational improvement, the rise of its seminal concepts, and how he absorbed them in his own personal and professional development and in case studies. He worked and learned from many of the greatest names in organization development (OD) and was influenced intellectually most profoundly by Kurt Lewin. He saw in Lewin's "action research" less of a technical change methodology than a way of thinking about and addressing organizational life and its dilemmas, using one's own and others' experience as the major source of change. This chapter describes the arc of his professional, conceptual, and practice development as an embodiment of action research. It also covers six enduring contributions of his – value-based perspectives, principles, and practices – and explores limitations and renewed possibilities of Weisbord's legacy to the future of the field.

Keywords

Action research • Business as a human enterprise • Facilitation principles and practices • Future search • Large-group conference methods • Organization productivity and performance • Sociotechnical approaches • Systems thinking • Values • Whole systems change • Work redesign

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Introduction

I finally met Marvin Weisbord in November 2014 through a video interview I conducted with him as part of Pepperdine University’s Master of Science in Organization Development (MSOD) Founders Video Series (Law et al. 2015). As a nonacademic organization development (OD) practitioner interested in theory, I had incorporated his ideas into my work for many years. We immediately connected, a tribute to his warmth, presence, and enthusiasm, qualities that have always shined through his books and articles. I set out to capture the evolution of his experience-based change learnings – the “whole elephant in the room,” as he would say. This was no small task, given the scope of his 50-plus-year career as writer, business executive, researcher, and organizational consultant, as well as Future Search founder and codirector of its global, nonprofit network. Through all, he interwove eclectic threads of OD thinking in an emerging synthesis of concept and craft.

During his entire career, Weisbord sought to hear and bring together others’ voices as part of a bigger picture “to help improve the conditions of things,” both human and situational. He was keen on understanding how diverse schools of organizational thought informed his firsthand experiences. He avidly absorbed lessons from the sages of participative management, intrapersonal and group dynamics, sociotechnical redesign, systems theory, and large-scale change, but he never lost sight of basic common sense. He was equal parts practitioner, observer, sense-maker, and thinker, influenced by so many, as he lovingly credited in his professional odyssey, *Productive Workplaces: Dignity, Meaning and Community in the 21st Century* (2012), an unconventional work that evolved in successive editions over decades, much like Whitman’s *Leaves of Grass*. It is a rich chronicle of Weisbord’s experience, a history of the field, and a critique of his own work, in which he revisited cases and revised his thinking to follow-up on organizations’ years after he had worked with them.

This chapter begins with a synopsis of Weisbord’s career. Through a few “marker” stories, I want to convey a sense of his *personal* future search: the experiences, influences, and questions that impelled him from one career phase to another and

from which his practical wisdom emerged. Moreover, I want to highlight his dedication to *action research* – even before he knew the term – immersing himself in experience, then letting his mind roam free on the implications for theory and practice. It is no wonder he found a special kinship with Kurt Lewin, “the practical theorist” (Marrow 1969). Looking back over the course of his professional life, Weisbord saw Lewin’s action research less as a technical method than as a way of thinking about organizational dilemmas. In this sense, action research became the red thread running through his work. He also came to see it as a missing “ribbon” around much of how the field is practiced today, affecting its vitality and renewed future possibilities. But I anticipate the end of our story here. Let’s begin at the beginning.

The Arc of Weisbord’s Journey: Influences and Motivations

Weisbord did not set out to do the kind of work for which he eventually became widely known. His intent, from his early days growing up in Pennsylvania, was to be a professional writer. In the 1950s, he wrote and sold general interest magazine articles during college and graduate school at the University of Illinois and the University of Iowa, having studied journalism and social science; he also served as a US Navy journalist and taught journalism at Pennsylvania State University. Additionally, he took post-master’s courses in American Civilization at the University of Pennsylvania. Having married and started a family, Weisbord supplemented his writing income by joining his father’s family firm during the 1960s. But he continued to publish articles and wrote two books, *Campaigning for President* (1966) and *Some Form of Peace: True Stories of the American Friends Service Committee at Home and Abroad* (1968). These books sought to understand individual stories and how together they formed larger social patterns, reflecting his abiding interests in experience-based social inquiry and his ambitions as a professional writer.

Meanwhile, his experience as a business executive in his father’s direct mail, business forms manufacturing firm led him to practical dilemmas in work organization and participative management. For example, he wrestled with how to incent shop floor workers to maximize productivity, how the effects of absenteeism on work output could be reduced, and how infighting between work groups could be alleviated. Weisbord experimented with self-managing work teams in the mid-1960s, on the counsel of a friend and compensation specialist, Don Kirchhoffer and his RCA training colleague Bob Maddocks. Weisbord witnessed firsthand how informal social factors and work design affected performance on the shop floor and how changes in wage-incentive schemes, his first hunch, were not enough. Kirchhoffer gave him a copy of Douglas McGregor’s *The Human Side of Enterprise* (1960), which Weisbord said “blew his mind.” Maddocks introduced him to systems thinking, a fundamental shift from his previous piecemeal way of addressing work problems. Moving the business from supervisory-led functional departments to self-managing teams – in which workers could directly coordinate and control their own work – Weisbord was struck by how a team of new, young workers learned, taught

each other their jobs, and outperformed their peers, while some former supervisors complained about a loss of power and status, despite assurances of employment and no downgrade in pay.

There were pluses and minuses with the changes he introduced. Some of the reluctant supervisors eventually left, and some of the hourly workers who stayed did not take hold of the participative path. But some results proved remarkable. In order processing, throughput increased 40% and absenteeism and turnover went to nearly zero. Workers' self-esteem shot up when – after finishing their work early – they sought out and found other productive business contributions to make.

During this time with the family firm, Weisbord proceeded with trial and error, trying to make sense of what he saw. Deeply impressed with McGregor's *Human Side*, he also wanted "something more specific." He found it in McGregor's posthumous book, *The Professional Manager* (1967). A chapter on the redesign of a circuit board manufacturing plant, part of Non-Linear Systems Inc., informed Weisbord's practical efforts at establishing the self-led teams, and his trying out a pay-for-knowledge scheme to support multi-skill learning. This was his first acquaintance with sociotechnical approaches, which he would later delve into fully. He also read Rensis Likert's *New Patterns of Management* (1961), where he was attracted by how Likert quantified and systematically operationalized the management orientations of McGregor's Theories X and Y. Likert's work underscored what became Weisbord's central takeaway from McGregor: Business is a *human* enterprise and requires placing the existential human factor at the center of productive work. McGregor was also an eye-opener, because Weisbord saw how, without ever intending to, he had been caught up in bureaucratic, control-oriented Theory X assumptions in his management of the business. This recognition helped free him to experiment as he did with the self-managing teams. This first foray into sociotech also provided a root experience in which he began to see that, at bottom, the business and human dimensions of organizations are not antithetical, as they often become in practice and ideology. They are inextricable. Important technical tasks and business outcomes could not be obtained without real attention to the *inner quality* of the human experience, not just human behavior. By the same token, business, economic, market, and technological factors, along with flexible work design structures, were essential to address. After all, they were the *practical, dynamic context* in which purposeful work – and human growth in organizational settings – happened.

Weisbord left the family business in 1968 with the aim of dedicating himself to magazine and book writing. Despite his rich learning and accomplishments, he considered his years as a manager "wasted" for not doing what he really wanted. Later, he came to realize that his business experience laid the groundwork for a career in consulting, OD, and a new focus in his writing. This awareness began when his friend Bernard Asbell, a professional writer, asked Weisbord to join him in a consulting project with the Ford Foundation's Division of Education and Research. "Why me?" Weisbord asked. "I don't know anything about consulting." Asbell replied, "All we do is interview people and write a report – what you do all the time – and we can figure out the rest. Besides, they pay \$100 day a day – each." Weisbord, having a family to support, thought, "Why not?" The two began the

project, and one evening over dinner, Weisbord talked with Asbell about a new book idea he had been mulling over: the effects on a community when it is bypassed by the building of a superhighway. “Why would you write about that?” asked Asbell. “All you do is talk about those work teams in your business. That’s what you should be writing about.” Asbell was prescient, and there was Weisbord’s future unfolding right in front of him.

He decided to explore the topic with a set of articles, the first of which was a 1969 assignment from *The New York Times Magazine* to write about NTL T-Groups, unstructured, experiential learning labs in human relations, radical in concept. He called NTL cofounder Bradford, who invited him to lunch along with then-NTL staffer Charlie Seashore. They agreed that Weisbord could participate in and write about a group, even though he imagined they thought him a bit naive. They introduced him to Bill Dyer, a then-top T-Group “trainer.” With the participants’ consent, Weisbord sat in the group as an observer, taking copious notes. He was captivated by what he saw and felt during the weeklong event. He identified with the mid-managers in attendance, as well as Dyer in his special facilitative role, attuned to what was happening moment-to-moment. As it turned out, the article was never published. But Dyer read the manuscript and wrote that he considered it the best ever written about T-Groups, aligned with what he was trying to accomplish descriptively and conceptually. The piece was not published until it was included in the third edition of *Productive Workplaces* (2012).

Weisbord began reading more deeply in the thinking and history of the emerging OD field that was burgeoning with new publications. In 1969 and 1970, he read the entire new Addison Wesley OD series, including books by Richard Beckhard, Ed Schein, Warren Bennis, and Paul Lawrence, all of whom he would subsequently meet and learn from. He read Chris Argyris’ *Intervention Theory and Method: A Behavioral Science View* (1970) and Likert’s *The Human Organization: Its Management and Value* (1967). He began writing articles on management topics for IBM’s provocative *Think* magazine, the editor of which he knew from his graduate school days in Iowa. The Ford Foundation project led to consulting assignments, and he dove into Alfred Marrow’s biography of Lewin, *The Practical Theorist* (1969). When he encountered Lewin, Weisbord was hooked. “This is where I knew I belong,” he said.

Lewin’s writings, from their first in the 1920s through the 1940s, were a huge influence on Weisbord. He saw the principles and practices of action research as not just a method but as a way of engaging with people and ideas. “Lewin’s organizational change theories enormously attracted me after my experiences as a manager,” Weisbord wrote. “And ‘action research’ soon formed the core of my consulting practice.”

Lewin conceived a novel form of problem solving that might be called “doing by learning.” Lewin wed scientific management to democratic values and gave birth to participative management. And he did much more. He taught that to understand a system, you must seek to change it. This led to one of the key managerial insights of the last century: Diagnosis does not mean just finding the problem, but doing it in such a way as to build commitment for action. His was an unprecedented idea. While solving a problem, you could study your own process and thereby refine the theory and practice of change. He also pointed the way

toward collaborative consultation. Lewin showed that even technical and economic problems have social consequences that include people's feelings, perceptions of reality, sense of self-worth, motivation and commitment. It is not given to consultants to sow the seeds for change (a screwy notion that spells trouble), but *to discover what seeds are present and whether they can be grown* [emphasis added]. We owe that precious insight to Lewin. (Weisbord 2012, pp. 80–81)

Weisbord saw Lewin's pioneering discoveries as profound: in interpersonal, group, organizational, and social dynamics; in fundamentally humanizing Frederick Taylor's insights (e.g., "scientific management") while still seeking precision; and in articulating a way to think, learn about, and encourage interdependent change *to the extent that conditions for change – themselves subject to discovery – were present*. Weisbord's appreciation of Lewin only deepened over time. He came to see Lewin's advances as permeating the entirety of OD.

Professionally, he came a member of NTL Institute and his consulting practice began to blossom. Weisbord partnered with many consultants, continuing to learn, co-learn, and try out many emerging techniques. At NTL, Warner Burke supported him in training workshops and facilitating labs. He also worked with Gail Silverman, Peter Vail, Allan Drexler, Ronald Lippitt, and Tony Petrella. During the 1970s, in consulting, he spent several years working with Paul Lawrence in nine academic medical centers. Their project evolved from Weisbord's first major change effort with Women's Medical College of Pennsylvania in its metamorphosis to a coeducational institution. Drawing upon Likert's ideas, he helped create a participative structure using "linking pin" planning councils, to rethink the mission, organizational structure, and budget process.

His lessons learned included appreciating the difference between relatively easy-to-grasp organizational change concepts and procedures and actualizing meaningful movement in the face of turbulent social conditions and real-world stakeholder constraints. Whether or not the change efforts produced the structural outcomes or "deliverables" as intended, the mutual support of the planning councils proved fertile for the medical school's future. This work resulted in several research studies that Weisbord copublished under the auspices of NIH and the Association of American Medical Colleges (1978). It also led to his provocative essay, "Why Organization Development Hasn't Worked (So Far) in Medical Centers (1976)." Of the latter, years after revisiting some of the key players of the case, Weisbord said that he had "learned the wrong lesson from experience" because there had been enduring value in the collaboration and connective tissue created by the intervention itself, notwithstanding the lack of immediate structural effects. In a similar vein, drawing upon the work of Likert and his colleague Floyd Mann from the University of Michigan's Institute for Social Research, Weisbord focused on other consulting projects that used survey research. He was struck by Mann's emphasis on the importance of feedback and dialogue in addition to the use of survey instruments, even though Weisbord was instinctively drawn to the measurement of "soft" factors like decision-making. At the end of the day, survey "findings" came alive only through their relevance to people's actual experiences. This thinking was also consistent with how

Weisbord came away from his NTL training work. He found the human relations lab moments – critical as they were – to be meaningful only insofar as he was able to connect them back to his real-world experience of improving organizational life.

He first heard the cobbled expression “realife” (as in, “Yes, that’s fine for a workshop but what happens when you try it back in *realife*?”) from Peter Block. Weisbord had met Block and Petrella at an OD Network conference in 1970, and by 1974, he joined their partnership after working on projects with each of them and with Petrella at NTL team building labs. Block Petrella Weisbord Inc. became one of the most renowned OD and learning firms in the world, from the mid-1970s through the mid-1990s.

Despite differences in their areas of focus, the partners shared similar orientations as non-PhD practitioners strongly interested in ideas. As Weisbord put it, they were hard-nosed businessmen committed to improving work systems *and* their human dimensions. By nature, they were each imaginative innovators and design-thinkers. They found natural synergies to build on and learn from: Block the philosopher-advocate and teacher-trainer par excellence; Petrella the gifted practitioner, team builder, and large system change interventionist; and Weisbord ever the journalist-observer in the way he worked, bringing people together to coevolve a bigger future.

One of Weisbord’s deep learnings came from seeing Petrella’s innovations in team building technique, both of them having been influenced by the human dynamics of Mike Blansfield’s “Team Effectiveness Theory (Weisbord 1985b).” The classical form of team building was that of interviewing each of the team members and summarizing the findings into themes that were then fed back to the team for consideration, deliberation, and action planning. This method in essence followed Lewin’s course of providing feedback to “unfreeze” the system.

Petrella was struck by the oddity of the interventionist’s being the one who summarized the findings and provided the feedback, since the team members were the ones with the perceptions in the first place. All the more, given that the aim of team building was for the members to get closer. He hit upon the idea of interviewing each member in front of the others, based on what he or she was willing to share. This way, the members owned responsibility for sharing their perspectives and engaging with each other directly, creating fuller unfreezing of the status quo, an immediate picture of the whole, and greater possibilities for the future. Each had to decide on the extent of his or her self-disclosure and willingness to trust others from the get-go. This illuminated the observations Weisbord had made while working with Asbell, when he wondered aloud, “Why are we as the consultants writing the reports when the participants are the ones who know what’s happening?” With Petrella’s innovation, the team building task could now be seen practically, as a matter of *structuring the context* in which the members could share their own thinking and put the bigger picture together for themselves. This influenced Weisbord to take another look at his more general consulting approach. Prior to his years with Block Petrella Weisbord, he had formulated his well-known “Six Box Model” published in *Organizational Diagnosis: A Workbook of Theory and Practice* (1978). The six-box model had roots in Weisbord’s prior experience with the family firm and Maddocks’ systems thinking influence. When Weisbord conceived it, the six-box model – purposes, structure, relationships, rewards, helpful mechanisms,

and leadership – aimed to provide a practical assessment tool: where to look for issues and where to offer help. But as he continued his own development, he became uncomfortable with the idea of “diagnosis” as a more discreet phase of work than an OD “expert” performed. He found the concept of diagnosis to be too far removed from the necessary work that organizational members must do themselves to *own* the assessment, and he found the idea of diagnosis too fixed to deal with the increasing speed and dynamism of organizational change. Weisbord began to reframe Lewin’s “unfreezing, moving, and refreezing” as part of a nonstop change process. He came to think of the six-box model as a set of snapshots depicting where a system is at any point in time. The model was most useful when clients collected their own data, developing commitment to act.

His understanding of systems thinking deepened as he met and worked with Eric Trist as part of his continuing work with Block Petrella Weisbord. Trist had studied Lewin’s work and was a colleague of the pioneering social psychiatrist Wilfred Bion at London’s Tavistock Institute of Human Relations. Weisbord grew close to Trist until the latter’s death in 1993. Trist also introduced his collaborator Fred Emery and wife Merrelyn to Weisbord. Beginning in the late 1970s, Weisbord had many conversations with the Emerys about their and his work. He became immersed in sociotechnical and open-systems theory and practice, appreciating these approaches’ revolutionary implications for the workplace. Among the many lessons he learned, Weisbord became more explicit in his grasp of work design as the central *task* focus of systemic change efforts (a key learning from the fiery, no-nonsense Fred Emery), as well as his understanding of human dynamics – some of which were unconscious – as the central *process* focus needed (a learning from the more empathic Trist). Trist and Emery’s own collaboration provided Weisbord with a wide-angle lens for comprehending his experiences as a whole, helping him crystallize his lessons from business, consulting, and NTL around large-scale change.

Two more points about Emery and Trist are noteworthy to mention before turning to the final chapter of Weisbord’s professional life, his work developing Future Search and the Future Search Network. His takeaway from Emery on the need for participants to transform objective work processes in no way diminished Weisbord’s attention to the human dynamics always present as people worked the redesign tasks – for example, ways they would engage or disengage, project, and counterproject with each other and the change facilitator. He considered this subjective dimension the heart of transformation efforts. Emery thought this soft, but Weisbord persisted: Unless *inner* emotional experience was touched – not merely shifts made in work process and behavior – then the fuller productivity, meaningfulness, and motivating power of the change would be in question. “This was something the Emerys never quite got, despite their big contributions,” Weisbord recounted (Law et al. 2015). Trist encouraged Weisbord toward “a conceptual emboldening” for *Productive Workplaces*, resulting in Weisbord’s “learning curve” formulation (described more fully in the next section of this chapter). This was a conceptualization that not only framed the book but the entire evolution of the field. Even more was the personal effect of the relationship on Weisbord and the role model that Trist provided. Weisbord fondly remembered:

Eric was my friend, colleague, mentor, gentlest collaborator and toughest critic. For 15 years I had enjoyed his calm presence, dry wit, boundless compassion and intellectual rigor. Eric had a quality shared with his mentor Kurt Lewin. That was the ability to find a kernel of truth in every statement, a seed of constructive possibility in every experiment, no matter how outlandish. I had seen Eric many times take a novel idea, turn it this way and that, and hand it back to its originator richer, fuller, and more insightful. (Weisbord 2012, p. 198)

Weisbord's interest in large-scale conference formats represented a culmination of his preceding work, as he brought people together to work on whole systems improvement themselves. He had already known Merrelyn Emery and her work with her husband and Trist in the search conference format. He got to know Lewin's student Lippitt, who had pioneered large-group, future-oriented community meetings with Eva Schindler-Rainman. Weisbord was especially struck by the opportunity to apply the conference approach to organizations and, before long, also applied it to wider social communities too. He came to realize that too much emphasis was placed on the "change agent" to sew an organization together through cascading interventions, teaching people, and the like. Rather, he saw that the issues needing tackling were imminent and from the start required a practical, holistic perspective that no one stakeholder group possessed. It was the dilemma of seeing the "whole elephant" in a way that connected to the real-world experience of everyone involved, up, down, and across organizations, and often those outside it. Later, he came to characterize this as "making systems thinking *experiential*."

Moreover, he had found in his earlier consulting work that customary OD approaches seemed to take too long before people inevitably "hit a wall," where constructive movement at the enterprise level got stuck. This, too, reflected the truth of Lewin's maxim: "The way to understand a system is to try and change it." Only in action would the limits of what the system is really capable of be discoverable. Reciprocally, if the "field of action" was orchestrated in such a way that new kinds of interactions were possible (e.g., getting everyone in the room to address whole systems concerns), then the hold of some of the past limits could be let go of. From Lippitt, Weisbord learned that all parties with a stake in future success needed a way to get real with each other quickly, to let go of what was holding them back, and to focus on common ground. He connected with others concurrently working with large-group meetings, including Billie Alban and Kathleen Dannemiller. He also studied the Tavistock conference method from England that had especially influenced Trist. The Tavistock Institute of Human Relations was established in England at just the time NTL was being launched in the USA, influenced heavily by psychodynamic traditions employed in the social sphere, i.e., sociodynamics. Its experiential conference on group relations offers a somewhat more structured approach than T-groups to get at deep issues of power, authority, and human effectiveness in organizational life. Weisbord noted that Fred Emery, unlike his collaborator Trist, was "never a fan of the Tavi conference – it was too personal!" (Personal communication, 2016).

The distinctive Future Search approach is discussed in the next section. But it originally appeared in the first edition of *Productive Workplaces* in 1987. That year, Weisbord took a leave of absence from Block Petrella Weisbord to be a senior

research scientist at the Norwegian Institute of Technology in Trondheim, where he studied pioneering approaches to work design and large-group dialogue. He came to see the conference approach as different from OD – e.g., getting “everyone” in the room to improve whole systems themselves, integrating head and heart, body and soul in a larger environment than a single organization. Continuing his own development, he became involved with the body/mind integration work of John and Joyce Weir (1975) and their understanding of “self-differentiation,” which would inform his stance as a facilitator in large-group conferences. In 1987, he met Sandra Janoff, a teacher in an experimental school where city and suburban children formed a self-managed learning community. Janoff’s experience mirrored his own work with businesses, and together they began to refine Future Search principles and practices. By 1993, they had cofounded the Future Search Network. For the next 20 years, they conducted scores of conferences for businesses and communities around the world and trained more than 4,000 people in applying their principles for large-group success.

True to his original intentions, Weisbord continued writing throughout the consulting and Future Search phases of his long career. He captured his learnings in dozens of OD articles, many coauthored, and served as an associate editor of NTL’s *Journal of Applied Behavioral Science* from 1972 to 1978. In 1974, with Howard Lamb and Drexler, he wrote *Improving Police Department Management Through Problem-Solving Task Forces*, based on their work with an urban police force, and he refined the six-box model in a textbook, *Organizational Diagnosis*, which was published in 1978. His magnum opus, *Productive Workplaces*, first appeared in 1987; his “revisited” version of it was released in 2004 (and voted by the OD Network as one of the most influential OD books written during the last 40 years); and the 25th anniversary edition was published in 2012. In 1992, he solicited work from 35 international authors and published *Discovering Common Ground*. He and Janoff jointly authored *Don’t Just Do Something, Stand There! Ten Principles for Leading Meetings That Matter* (2007); *Future Search: Getting the Whole System in the Room for Vision, Commitment and Action* (2010); and *Lead More, Control Less: Eight Advanced Leadership Skills That Overturn Convention* (2015). Finally of note, continuing to innovate and reflect his enduring journalist sensibilities capturing life in action, he cofounded Blue Sky Productions with Allan Kobernick and Janoff in 1987, recording more than 30 videos on workplace improvement and case studies. Weisbord was indeed a prolific author and more. We now turn to a view of his most enduring and fundamental contributions.

A Distillation of Weisbord’s Wisdom: Key Contributions

There is no question that Weisbord’s contributions and influence on others in the field have been vast. But, for me, some contributions from his life’s work stand out more than others, rising to a “first principle” order. For example, his six-box model was an innovative (and still widely studied) way to think about organizational diagnosis. However, I believe that the summit of Weisbord’s journey yields a more fundamental set of six learnings – conceptual and practice methodology reflections

that can be distilled from his lifetime of action research. Each of these contributions has a distinctive Weisbord “ring” to it, despite his comprehensive collaboration with others and his drive to learn from (and with) so many. They are:

1. “Everybody” Improves Whole Systems
2. Human Systems Facilitation: Don’t Just Do Something, Stand There
3. Putting the Socio Back into Sociotech, the O back into OD
4. Techniques that Match Our Values
5. The Future Never Comes, It’s Already Here
6. The Learning Curve: Organizational Improvement Past, Present, Future

“Everybody” Improves Whole Systems

This is the core principle behind the Future Search method. Weisbord’s conception of the evolution of the field is treated in the final, sixth principle of this section. But suffice it here to say, Weisbord understood that if indeed we are confronted by what are inherently whole systems matters, then addressing them must be an all-hands effort *as a matter of principle*. Given the complexity and speed of organizational and other social system change, no one leader, person, stakeholder group, or constituency can grasp the whole of the systemic situation. All are needed to help one another see the situation, envision future possibilities, mobilize for action, and enact the future. The spirit of this, and a detailed approach, is captured in Weisbord and Janoff’s *Future Search: Getting the Whole System in the Room for Vision, Commitment and Action* (2010), a work itself that evolved over three editions and 15 years of practice and learning. Regardless of the technical approach to large-group conference methods – Future Search, Open-Space Technology, Real-Time Strategic Change, or others – Weisbord came to see this principle as basic for meaningful, systemic change, one that did justice to both task achievement and human fulfillment.

In practice, getting everybody in the room for a Future Search conference means at least a “3-by-3” representation of those affected by a particular strategic concern – three functions wide and three functions deep, or more, where 60–100 people (with authority information, resources, expertise and need) are convened in a 3-day working session on the critical issue or opportunity at hand. People are invited to “come as you are,” bringing their experience and thinking to bear. No prior effort to change them or train them in behaviors, skills, or systems models is needed, nor is the goal to “manage resistance” or advocate change on the part of the facilitators or meeting sponsors. Instead, it is to have the right people show up at an appropriately structured meeting in which they feel safe to share their experiences and speak heartfelt thoughts about the topic. This applies equally to executive leaders. In this, the preconference design task, done jointly with selected client partners, is to fashion a safe space for the collaborative work of the conference. This follows the general insight of Petrella’s team building innovation discussed earlier, applied to the whole systems realm. The idea of getting “everybody” in the room as a large-scale meeting

concept was derived from Lippitt and Schindler-Rainman. Related core ideas for Future Search that Weisbord and Janoff (2007) identified are:

- *Explore the global, “whole elephant” context for local action and before trying to fix any part.* Again, this is a task for participants in the conference, not the work of an “expert” diagnostician, allowing all parties to “talk about the same world” and codiscover that they all share the same basic dilemmas (derived from Emery and Trist and reflecting Weisbord’s transcendence of his own Six Box Model).
- *Focus on common ground and future action, not problems and conflicts.* This energizes people for concerted action and limits taking participants back down the demoralizing path of irreconcilable differences (derived again from Lippitt and Schindler-Rainman, while also anticipating the later work of Appreciative Inquiry).
- *Have people self-manage their own groups and be responsible for action.* This means that people in relevant small groups within the large meeting format directly address their own piece of the puzzle once the bigger picture and common future priorities are identified. They then report out to the plenary for feedback, dialogue, and next steps (drawing on Weisbord’s early experience with self-managing teams and influenced by Emery and Trist).

These core ideas directly inform the basic Future Search agenda: Day 1 addresses “where we’ve been” (past); Day 2 addresses “where we are” (present) and “what we want” (future); and Day 3 includes “how we get there” (common ground and action). Traditional and innovative conference techniques are used in the Future Search approach, including storyboarding individual, group, and the organization’s (or community’s) historical development; focusing on people’s *experience* as the biggest source of useful information; and creatively imagining and dramatizing preferred futures for all to consider.

One notable feature of Future Search is that the time devoted to “action planning” gets considerably compressed compared to many other methods because of the immersive sharing of past and current experience and future thinking. Commitments for salient action are more immediately mobilized and zeroed in on by the process itself. Participants are “living into” the desired collaborative future by virtue of the conference design, which gives them room to experience it right in the room in the rapid, 3-day setting. The sought-after future is crystallized in the “here and now,” with less gap between past and future to be analytically debated and bridged. Follow-on actions and reconvening to discuss and extend progress on priorities become natural outgrowths, assuming the right conditions and people’s readiness to attend to them hold.

Because of their design, Future Search conferences have been successfully held in a wide variety of countries and cultures around the world and across sectors: arts and culture, business, communities, congregations, education, environmental, government, healthcare, social services, technology, and youth. Weisbord and Janoff (2007) described multiple examples with outcomes of Future Search conferences, including community building in a Northern Ireland city, reducing sectarian conflicts through

alliances for economic renewal, work with UNICEF to demobilize child soldiers in Southern Sudan, global work connecting IKEA with NGOs to redesign its supply chain aligned with environmental sustainability, and dozens more, both commercial and social in impact. The Future Search Network site at <http://www.futuresearch.net/network/videos/index.cfm> also has several videos that show conferences in action and interviews with participants from across the globe. Reflections on some limitations and future possibilities of Future Search concepts can be found in the last section of this chapter, “Legacies and Unfinished Business: A Renaissance of Action Research?”

Human Systems Facilitation: Don’t Just Do Something, Stand There

Throughout his career, Weisbord understood that those seeking to engage others in bettering organizational and social conditions are best served by a stance of genuine curiosity. His instinct was always to hear the myriad voices at play and follow where the emerging story led, as a whole and in its rich detail. This perspective completely informed his work in business, OD, and Future Search. As he gave up his Theory X assumptions as an executive, assumptions that never naturally suited him, he saw the results of his experiments with self-led teams and let them shape the next steps he took.

In his OD work at NTL and with Block Petrella Weisbord, he followed the course of people’s experiences – including his own – as he carefully listened and intervened. So by the time he arrived at Future Search principles and practices, he had come to a different concept of the facilitator’s role: The facilitator was not only *not* there to diagnose and “lead” change but he or she was to simply stand alongside those in the system who were seeking to improve their worlds and were ready enough to get in the room together and try. The facilitator’s contribution was thus to help set the stage for people to do the work themselves – which also included a major contribution, as a consultant with expertise, in structuring and qualifying the context to promote collaborative dialogue. But Weisbord’s stance as facilitator in the sessions, once begun, was reflected in the title of his 2007 book on facilitation principles and practices (written again with Janoff), *Don’t Just Do Something, Stand There*. Weisbord and Janoff described it as “no ordinary meeting book.”

We aim to help you free yourself from the burden of having all the answers to the mysteries of human interaction. We will introduce you to a philosophy, a theory and a practice that is at once radical and simple. To apply our ideas, you will not need to worry about anybody’s behavior but your own. (Weisbord and Janoff 2007, p. ix)

Ten principles for facilitating “meetings that matter” are covered in this pithy volume, starting with those for leading meetings and including those that will be familiar from Weisbord’s Future Search concepts: Get the Whole System in the Room; Control What You Can, Let Go What You Can’t; Explore the “Whole Elephant;” Let People Be Responsible; Find Common Ground; and more. But two

of the principles in the book's second section, "Managing Yourself," deserve special attention because they capture deep aspects of "self as instrument," an uncommon bridge from the intra- and interpersonal to the practice of large-scale change: Make Friends with Anxiety and Get Used to Projections.

Understanding anxiety in oneself – and how it links to the anxiety those in the client system experience – is fundamental for Weisbord, especially given the complexity and uncertainty of large-scale change. Expecting anxiety (not trying to quell it for predetermined "success") is key. So is getting comfortable with the inherent projections and countertransferences that abound with all of the voices in the room. Both habits are essential to remain *present and helpful* – that is, to not simply do something out of anxiety and projection but to just stand there, really experience what is happening in the moment, and be of help. These are deep legacies from Weisbord's active years at NTL. While he and Janoff offered a range of practical suggestions to cultivate these practices, it is clear they are seen as self-mastered, emotional competencies.

For Weisbord, change readiness of system members and facilitators depends on recognition and acceptance of the inherent anxiety that change provokes. He cited Claes Janssen's concept (2011a, b) that people cycle through "four rooms of change": contentment, denial, confusion, and renewal (then back to contentment). Weisbord contended that it is only in confusion – the room of uncertainty, high anxiety, but also possibility – that people are most receptive to working together for change. Rushing people off of anxiety in order to have things tidy does not make for real interpersonal contact or headway on substance. Nor does pushing them when they are in the room of denial.

In a related way, those facilitating change are well served by staying aware of their own hot buttons to clearly recognize projections that others put on them, as well as their own tendencies to project. And they best allow the group to handle its own issues. This is one reason Weisbord came to see that the facilitator's role should be made smaller and smaller, not larger. This is a tough discipline, as all of us at times may be tempted to *talk* models and *make* things happen, which is the opposite of action research. One practice that Weisbord and Janoff found helpful was applying John and Joyce Weir's invention of "percept" language (1975), a technical way of thinking about what is being said in the room when one's own hot buttons – conscious or unconscious – are pushed, to get a clearer picture about what is "out there" versus inside our own heads.

But whatever the technique used, Weisbord saw the value in continuing to learn about oneself, coming to terms with uncomfortable, denied, "shadow" parts of the self. This allows facilitators to invite others to really share their views and not get triggered in overreacting to what is happening in the room, either through distorted perceptions or unhelpful actions. He wrote:

There is a lifetime of personal work for each of us in contacting the shadow side of our natures, integrating the voices that tug us away from creative and humane impulses. We're never finished, and the right time to do it is every day. (Weisbord 2012, pp. 477–478)

In my interview with Weisbord, he shared a thought from his learning with John Weir: “If all human beings come from common ancestors – call it Adam and Eve or our species’ evolution – we each have all the genes of everyone who has ever lived. So the more parts of ourselves we discover and truly integrate, that extends the range of humanity with which we can productively work (Law et al. 2015).” This reflected another Weisbord hallmark: the convergence of the deeply intrapersonal and being in the widest world outside of us.

Putting the Socio back into Sociotech, the O back into OD

Along with his business partners Block and Petrella, Weisbord shared the view that the human and actual work dimensions of an organizational system cannot really be pulled apart. They are not, as referenced earlier, antitheses, but twin aspects of a common, human systems root that must be dealt with to more surely move forward. In practice, many consultants and academicians specialize in one side or the other, with the human side frequently treated as behavioral, cognitive, or other “soft” matters and the work side seen as other “hard” factors – strategy, structure, technology, rewards, work design, and the like. Still many others will seek to combine them into a complex model (cognitive again). Regardless, for Weisbord, something is still missing: the *felt*, human side of enterprise – the world of what people actually experience and what they actually do. In fact, Weisbord said that the notion of an “organization” is a kind of reification; it is only people who make things happen, or, as the case may be, not. The “organization” acting is as much of a fiction as a desk jumping up to do the work. But that doesn’t mean the *organizational context* is not in play, particularly “the real work” that goes on and how people perform it.

Some practitioners refashioned sociotechnical approaches – the robust theory for having people redesign their own work, which Weisbord learned from Emery and Trist – into a highly technical work variation analysis. The human behavior component became de-emphasized and lacked the vitality it had at the origins of the approach, going back to early Tavistock projects, grounded in Bion’s sensibilities. Weisbord wrote, “Just as Taylor’s sophisticated integration got reduced to time and motion study, so did sociotechnical systems become for many people a package to be installed like new software (Weisbord 2005, p. 6).” I found this in my own training in sociotech in the mid-1980s. It felt very mechanistic to me, with “human factors” tacked on for good measure. Weisbord recoiled at this trend, although he identified certainly with the way the actual work of an organization was performed. After all, it was his learning with Emery and Trist that gave him clearer insight into what he had done with the family firm work teams years earlier. But he continued to see and write about the human experience at the center of the equation. In this, we might say that Weisbord helped “put the socio back into sociotech.” His lifelong practice of experiencing what is happening first and theorizing later also attests to this. So does his interest in the inner world of the facilitator, in the way he or she engages with a large work system or social community.

Conversely, Weisbord with his partners Block and Petrella held to the view that behavioral or personal growth activities, stripped of their “realife” organizational context, were unproductive for large-scale impact. “Alas, people improved themselves more than their organizations,” he said.

To remedy this, OD consultants invented team building to enable transfer of [T-Group] training (in the 1970s, I was a builder of some of the best losing teams in American industry). The strategic flaw of team building is exposed by systems theory. You can change a system only in relationship to the larger system of which it is a part – other functions, customers, suppliers, regulators and community. Don’t misinterpret me. Team building and training are existentially valuable activities. In both settings, people can learn to be open, confront conflict, collaborate, appreciate differences, diagnose problems and set goals – all worthy activities. What people cannot get this way is influence, let alone power, over policy, procedure, system and structure. (Weisbord 2005, p. 5)

Human lab learnings, when not connected back to real work situations – and when the stakes of interaction are at their highest – may run counter to actual movement. As a field, OD could as quickly drift into fuzziness, “where the rubber meets the air,” as some sociotech consultants characterized OD at the time. It was the polar opposite of sociotech’s mechanistic drift. Weisbord articulated that it was important to “put the O back into OD (2012).” Real performance, task accomplishment, and organizational and market context mattered, as had been his instinct from the start. Moreover, as he became more learned about OD, he recognized that when the “human side” is isolated from practical consequence, the promise of the field is missed: *humanness is embedded in practice*, not cold theory, another trace from Lewin.

Techniques That Match Our Values

Seeing the tendency for sociotechnical approaches to become reduced to mechanistic models, Weisbord drew another important implication:

Around [1990], I was invited to a manufacturing meeting in a famous paper company that is no more. The plant managers talked nonstop about the “multiskilled work team model” that a consulting group had put in – and how much resistance it stirred up. The company had *sacrificed participative values on an altar of canned techniques. We are always at risk to leave our values in the attic when we fall in love with great looking new techniques* [emphasis added]. (Weisbord 2005, pp. 6–7)

His understanding of the limitations of techniques, models, and the “science of organizational improvement” again owes a debt to Lewin. Weisbord came to see “social science” as an oxymoron, as elegant and precise a thinker that Lewin was, himself. Efforts to change large-scale human systems cannot proceed on classical scientific grounds, because their conditions are unique, dynamic, and non-replicable. As change facilitators, we are left with showing up as we *are*, with our presence, learning, and whole being. This requires us to keep our own baggage – attitudinal or

intellectual – out of the way. Only in this way can we really meet clients where they are, a truism in OD (Shepard 1975).

But just here, a paradox arises. What we *are* includes our values. If our values truly are values – woven in the fabric of our being and not objects we can trade like so many interchangeable “parts” – then they remain with us when we are present to help organizations. This does not mean that all things that strike us as a “value” of ours may quite be core. They may stem from unrecognized shadow parts of the self, covering deeper issues, thus serving as a kind of pseudo value. This is why self-work for Weisbord, and so many other masters of the craft, is an enduring faith and act. So the trick for Weisbord is not simply casting aside techniques or models but understanding ourselves deeply in our core, so we make best use of “techniques that *match* our values.” He put it this way:

No matter what strategies we choose, if we organization designers want job satisfaction, *we still are stuck with finding techniques equal to our values.* Techniques cascade down the generations like Niagara Falls. Values move like glaciers. Techniques fill whole bookshelves. Values take up hardly room at all. I can still say mine in eight words: *Productive workplaces that foster dignity, meaning and community.* (Weisbord 2005, pp. 7–8)

These may not be values shared with all those in the field, but they are Weisbord’s. And they doubtlessly resonate with many. Weisbord himself saw Future Search and other large conference methods as simply one type of strategy to meet these values, one that he expected would be eclipsed over time. The burden thus remains on today’s and new generations of practitioners to innovate approaches that take us ever more to our largest aims.

The Future Never Comes, It’s Already Here

Perhaps the grandest practical wisdom coming from Weisbord is his understanding that “the future never comes, it’s already here.” In a stunning passage in the last chapter of the same name in *Productive Workplaces* (2012), the innovator of Future Search wrote:

Let me tell you about the future as I have experienced it for the last 50 years. The future never comes. Today is the future you imagined yesterday. It’s slipping into the past by the second. When Frederick Taylor was born in 1857, every story in this book lay in the future. Now all are past. You cannot guarantee that what you wish for will happen. Improving companies, NGOs and communities can be existentially satisfying work if you avoid the megalomania of believing you build for the ages. There are no “secrets,” whether from Attila the Hun, Socrates, Joan of Arc, Machiavelli, Freud, Mother Teresa or Vince Lombardi, that you do not already know. Leave tomorrow to the cosmos. Today’s work requires every ounce of energy you have. (p. 472)

So if the future is now, how do better futures come into being? Weisbord’s basic answer is that the future is *enacted* one step at a time in light of a bigger vision, dream, or goal we hold out there. Thus, better collective futures are based on what

people practically do together today, then the next day, then the next day after that – all in light of a shared image of the future. Importantly, and contrary to what many consultants urge, that future image does not need to be worked out in great detail or lead to a blueprint. It should serve only as a reasonable facsimile of what a future *could be*, a *perceived* north star, as it were, to help inspire those on the journey to take steps each day, learning from them in real time as they move toward it. The journey can bring the destination more sharply into focus, uncover unexpected features, shaping and even shifting it. After all, we see the star only from the telescopes of today. In this way, better organizational and community futures *unfold* from the present, influenced by what happens today. They are coenacted by their players, not engineered – not simply cranked out from a plan. They happen, as Weisbord likes to say, “one meeting at a time.” For this reason, he is skeptical of the language of “transformation” and “culture change,” finding it grandiose. Similarly, his experience in complex change showed him that preplanned deliverables, detailed roadmaps, and project plans have little value. “We cannot go 20 moves down the chessboard,” Weisbord declared (Law et al. 2015).

Practically speaking, then, for Weisbord, big change really amounts to a process of “getting to the next meeting.” For example, when one productive conference is completed, leaders are wise to schedule, then convene, the next meeting, realizing that many smaller conversations, one on one or group, planned, and unplanned, would happen in between. Scheduling the next meeting itself shows commitment to the future, and a series of them provides a kind of glide path to the future as it is “lived into,” real time.

Consultants can add the most value here through their support in orchestrating conditions for this, and for helping to design the meetings so that dialogue on matters that mean most to people can happen. One such effect in the large conference format is that people start to experience new possibilities, relationships, and shared commitments *right in the room*. The change is happening before their eyes, and they are in the thick of it! These same principles can apply to small group meetings as well, although their impact will be limited to the extent that the right people for systemic reach attend. Finally, one can see that the trajectory of this fits for individuals in their own development. I have tried to show how this can be seen in Weisbord’s own career. Whether for an individual, group, or enterprise, this process represents another important facet of action research.

The Learning Curve: Organizational Improvement Past, Present, Future

When Trist reviewed a draft of *Productive Workplaces* in 1985 and suggested that Weisbord add a “conceptual emboldening” to the work, Weisbord was startled. He had not heard that phrase before and wondered if it was possible. He soon understood that Trist was asking him what overall conclusions could be drawn from his case experiences and his work with many of the field’s pioneers.

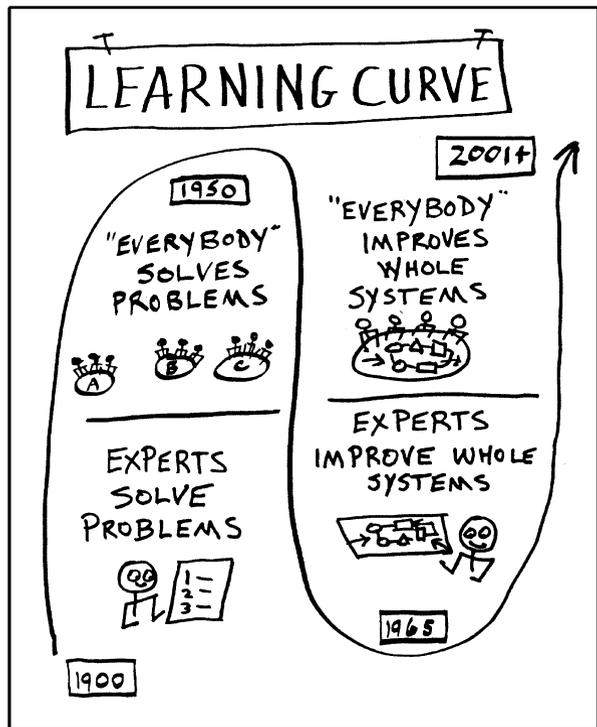
On a piece of scratch paper, I sketched what I had lived through in my work during the previous quarter century. Such was the origin of “The Learning Curve” that ties together the chapters of this book. (Weisbord 2012, p. xxvii)

Indeed, the learning curve does more than that: It provides a conceptual frame to understand the evolution of the field, past, present, and future. This is inclusive of OD, but broader still. Strictly speaking, OD – however one may define it – is part of a larger field of organizational improvement.

Overall, the concept depicts movement in four historical phases that build on each other. It represents basic ways that key organizational issues have been addressed, including the primary focus of improvement and who primarily attends to the issues. Weisbord termed the concept “a “learning curve,” because he saw it reflecting the ever-widening insights of organizational stakeholders and improvement specialists. But, as discussed below, it will be apparent these are not strictly phases. Rather, they are ways of thinking about and acting on organizational improvement (Fig. 1).

Not everyone moves through these in the same manner or even at all. And each of these ways remains dominant for some, as well as situationally appropriate, to this day. Still, the concept reflects a broad sweep of development over more than a century of efforts of organizational improvement.

Fig. 1 Organization improvement learning curve (Weisbord 2012)



The first phase, beginning at the turn of the last century, shows Taylor's influence on the application of "scientific" principles and practices to organizational improvement. Weisbord credited Taylor with an ethos to create a more democratic world that could lift the lot of all workers, based on the intervention of experts. In Taylor's day, these were industrial engineers, but they soon became experts of all kinds, doing interviews, conducting assessments, and performing analyses, then formulating solutions to problems of efficiency, work flow, technology, and the like. Many "expert" consulting firms of all sizes still operate with this approach.

Beginning in the 1950s, "human relations" insights began to take hold in practice, with employees' more broadly attending to solutions. This shift reflected earlier findings such as the Hawthorne studies, Lewin and Lippitt's discovery of "group dynamics," and the experiential learnings at NTL and Tavistock. The rise of team building, employee opinion surveys, behavioral and attitudinal training, interpersonal mediation, participative performance reviews, process consultation, and other similar activity came to the fore. Consultants with this orientation now served in more facilitative roles and helped participants address and tackle the issues themselves ("everybody solves problems"). The problem focus areas were, by and large, treated as discreet.

In the mid-1960s, as reflected in Weisbord's own journey, systems thinking started to break through in organizational improvement practice. Earlier work, such as Ludwig von Bertalanffy's general systems theory (1952), began to have an impact. Presenting problems in one area were increasingly seen as challenges of a "whole, open system," where economics, technology, strategy, structure, and other factors were now essential to consider. Weisbord succinctly summed up the definition of systems thinking: "Everything is hooked up to everything else!" (Weisbord 2005, p. 2). With employees and other stakeholders still involved, consultants tended to serve as experts to drive the work of change – given the complexity of the models – with increasingly sophisticated assessments and comprehensive solutions recommended to clients. This modality, where "experts improve whole systems," was dominant in organizational improvement strategies for the remainder of the century. It still characterizes many, if not most, of the large, worldwide consulting firms today. The economics and business models of these big consulting firms largely require this "expert" approach, as many of my colleagues and I found in years as partners with them.

The breakthrough of large-group process in which "everybody improves whole systems" began with the early conference methods in the 1970s; Weisbord worked more and more with that in the mid-1980s and beyond. As a more widely adopted way of addressing systems change, he dated the onset of this phase in the early 2000s, after groups such as the Future Search Network and other consultants concentrating on large-group methods made significant headway in achievements and use of the approach across the globe. The deep human dimension of the human relations movement returned, but now it was contextualized in what people did to work on large-scale strategies and actions that they drove. And instead of systemic information that consultants mined and complex models they introduced, the approach was now basically rooted in the experience of those in attendance and their sharing and making sense of that experience together for the future. The

consultant's role was now to assist the client in preconference planning to structure the process and then stand back and let things happen. The aim was to enable all to fully own the change to the extent of their readiness – and then some, given the dynamics of the mobilized, forward looking community.

Weisbord saw the milestone where “everybody improves whole systems” as the frontier of thinking about organizational improvement. But he remained too much of a historian to think that anything lasts forever, so he believed the future of that improvement would doubtlessly lead elsewhere. Speaking at a forum on organization design, he said that large-group interventions are not “the end of history.”

Every method has its limits, as we all are destined to learn. Our ancestors have given us priceless gifts, but none has prepared us for a world of cellphones, email, virtual teams, the kind of BlackBerries that nobody but a dog would chew on and, more to the point, a global economy that is consuming resources at a rate far beyond our ability to replace them. Indeed, sustainable organizations may have no future in an unsustainable world. The future of organization design does not rest on any particular methods. It lies with the values of the people in this room. The pioneers whose work I have mentioned – Bion, Emery, Lewin, Likert, Lippitt, Maslow, McGregor, Taylor and Trist – all belong to the ages. They have no more to tell us. Look around you, friends and colleagues. *We* are the ones who are now up to bat. (Weisbord 2005, p. 8)

New Insights (Maybe Only Old Ones, Rediscovered)

Weisbord has influenced my own practice in OD in many ways. I first read his work after I began internal organizational consulting in the mid-1980s. His initial design efforts with work teams and pay for knowledge influenced an earlier project I had started: an employee-led effort to restructure a note center for mid-market Imperial Bank in California, where teams of specialists could process and document commercial loans with greater flexibility, speed, cooperation, and efficiency than if they had remained isolated specialists working through the conflicts of branch and headquarters offices. I had been impressed with both the task outcomes and human bonding that occurred in the effort. Weisbord's work added a conceptual understanding to what I was doing. The first article I read of Weisbord's was “Participative Work Design: A Personal Odyssey,” *Organizational Dynamics* (1985a). This was an early piece that would become part of the first edition of *Productive Workplaces* (1987).

Not unlike Weisbord, I had first begun doing work at my company in task- and human-oriented change without formal training in the field, although I had studied theory in social science years earlier as a UCLA graduate history student. Weisbord's *Productive Workplaces* (1987) was first published as I attended Pepperdine's MSOD program after switching to business as a profession in the late 1970s. At Pepperdine, I was also introduced to large-scale methods by Dannemiller. I later applied large-group conference approaches in my work at the bank and in launching large client-consulting project teams when I joined KPMG Consulting in the mid-1990s.

As I worked over the years and began my own OD firm, I continued to experiment with large-group methods. I believe that two specific learnings are worth sharing, not because they are especially original but because they represent a kind of independent rediscovery through my own experience of conclusions at which Weisbord had arrived, thus validating his teachings for me.

The first of these has to do with a learning that *the promotion of confidentiality in team building and large-group intervention, far from fostering trust and group effectiveness, actually erodes trust and reinforces power distance between group members*. This occurred to me as I was doing interviews of a 30-member organizational unit for World Bank in preparation for a 2-day retreat of the entire team to consider its way of operating, given the constraints it faced in the institutional, operating environment. I had begun by interviewing unit members, assuring them confidentiality of what they were sharing with me and that I'd only report aggregate themes. But as I interviewed those from the top, middle, and bottom of the hierarchy, it dawned on me that the things they talked with me about were the very items they should be sharing directly with each other. After all, lack of trust and connecting with each other about what was happening in each of their worlds – and in a way they could do something constructively about – was the central issue that presented. Midway through the scheduled interviews, I began talking about the prospect of having each of the team layers – starting with the two co-leads – simply talk with each other, fishbowl style, about what their current worlds were like, with all others of the unit seated in a circle around them. Team members, including the co-leads, responded positively to that suggestion. I would sit to the side of the group in the middle, listening in, T-Group style. The only prompts were the few words hung around the room on flip chart paper – “Experience in your roles to date? Dilemmas? Frustrations? What you want from others in or outside the room?” – to guide their self-led discussions. After they concluded, those on the outside were invited to ask any questions for clarification and to say what they'd heard that they appreciated. No solutions or recommendation was invited. Those were reserved for day 2 of the retreat in structured rounds, where each of the natural work groups, in light of day one, would propose different operating models for the unit, drawing, describing, or dramatizing them in any way they'd like for wider discussion and next steps. For day one, as each of the hierarchical layers took their turns in the fishbowl, nothing about process was charted on the walls. But the entire unit left that first day – a day devoted to understanding, no action – with a rich picture of the status quo, dynamics, and all. There was no consulting interpretation. It was theirs. In day 2, they self-managed a discussion on the implications of day 1 thoughts, then crafted future operating model options and next steps. Notable in day 2 was how the co-leads stepped up to facilitate the whole unit in a way that shifted the perception of their power, their sincerity to share it, and the empowerment in the room. I didn't need to do a thing. I could just stand there. It was startling to behold!

Key takeaways from this case are twofold, each reinforcing Weisbord teachings. The first were the palpable shifts observable in the room, positively affecting the sensitivity of content shared, trust, leader-employee relationships, and the emergence of a shared systems perspective which drew from each of the participant's

experiences. My role as consultant was significant in helping stage the basis for the conversations ahead of time and in between the days, but it was very understated in what was done during the retreat. The other takeaway, as noted above, was with understanding that confidentiality is not something to be reinforced in the consultant's method, but a phenomenon to be unpacked. This lays more solid ground for joint, owned action to happen.

The second key learning is how I have repurposed the use of an S-Curve framework when I work with large groups. I use it as a way to conceptually depict a systemic state of confusion during a period of watershed change – the gap period between the old maturing first curve and the yet-to-emerge second curve. I have found that this can help people recognize that current conflicts ascribed to others, rife in these situations, are indeed part of a systemic condition. This affects the way current dynamics are played out in efforts to envision and resist potential futures. Once seen, I have found this can be liberating for players in the room to move beyond symptomatic blame. And it provides a way to systemically portray Weisbord's understanding of confusion, as the "one room in change" where anxiety and possibility dwell and where actual movement, enacted together a step at a time, is possible.

Legacies and Unfinished Business: A Renaissance of Action Research?

Weisbord's legacy looms large. I have sought here to illustrate the ways his thinking unfolded and identify key contributions to the field, which, beyond being technically influential, have enduring importance to the *spirit* of our work. I want to focus now on two last things. First, his legacy of dialogue in organizations, including some reflections on ways it has been seen as limiting. Lastly, I want to take a moment and ponder Weisbord's legacy as a whole – how he embodied and breathed fresh life into Lewin's seminal idea of action research – and what it hopefully signifies for the future of the field.

Weisbord's Future Search encapsulated most of his prior learnings and was part of a line of work of others in large-scale organizational and community interventions. All relied on experience-based dialogue as primary fuel for change. Weisbord and Janoff's *Future Search* (2010) briefly compared and contrasted the method with others in the field, and a more comprehensive side-by-side comparison of approaches can be found in Barbara Benedict Bunker and Alban's *The Handbook of Large Group Methods: Creating Systemic Change in Organizations and Communities* (2006). Moreover, the language of "conversations" and "dialogue" in organizations today is widespread. One scholarly piece of work in this vein, Patricia Shaw's *Changing Conversations in Organizations: A Complexity Approach to Change* (2002), is especially noteworthy, given the nature of its radical critique.

Essentially, Shaw's approach to large-scale change is to think of it as a "temporal" process. She described Future Search, Open Space, and other methods of large-group dialogue as more "spatially" oriented; hence, their focus is on convening all

the parties in a room, bounded by specific, often transformational intent. In contrast, she described an approach in which the consultant is invited into the world of work as it flows in time, without convening special meetings, to help people as they naturally meet to understand their work dilemmas in fuller ways. The consultant inquires into the stories people tell themselves about their organizational lives – e.g., What is happening? Why is it happening? For what importance? – so their narratives may be deconstructed or more fully threaded together across the organization. In effect, the consultant joins the team – not as an expert, nor as a neutral facilitator, but as a participant-observer, including sharing his or her own views and questions as may be deemed relevant. There are no “outside” systemic goals of sponsors, intents or tasks “superimposed” upon the groups. The process simply follows where the dialectic of the conversation leads. Shaw thus saw “conversing as a way of organizing” and as transformational activity in itself. She wrote:

I am describing a mode of working that does not proffer a blueprint for practice; that does not define roles or select working models. Rather, I am describing how we may join ongoing conversations as participant sense-makers, helping to develop the opportunities inherent in such conversations. I am suggesting that this involves moving into the constraints, restrictions and premature closures as they materialize in communicative action so as to sustain exploratory meaning making. I am drawing attention to vital, informal, shadow processes that more dominant systematic perspectives render rationally invisible. These are the ordinary, everyday processes of organizational life that offer endless opportunity as we move from conversation to conversation. (Shaw 2002, p. 70)

And while Shaw maintained at least an implicit criticism of Future Search as being too structured and controlled – a critique that goes farther than Weisbord’s own intentions to “let go,” since Future Search amounted to an expert design to promote substantial dialogue in the first place – she ended with this note:

Future Search events regularly [produce] the enthusiasm, collective focus and new action plans that its advocates suggest. The experience often generates optimism and goodwill. My question is not, “Is this worth doing?” Much may come of such events. Much *will* come of them and this will bear a complex relation to the hopes, fears and aspirations of the participants. My question is how to work with the ongoing conversational life of organizations in which such events may occasionally arise. (p. 151)

Shaw raises important questions for the sustainability of the conversation and action once it is evoked in a conference method. It is easier said than done to get commitments even to the next meetings, action teams, and the like. So Future Search, as Weisbord recognized, was no panacea. But his attraction to this approach in the latter part of his career was that he “never had to go to meetings again, where the right people, up and down and across, weren’t in the room where meaningful work could occur” (Law et al. 2015). He had attended so many meetings that were dead ended or dead on arrival and that Future Search represented a step forward and hopeful alternative.

Regardless, Shaw provided for an interesting critique. On the one hand, she accepted, if even in subtle terms by virtue of her anthropological approach, Weisbord’s principle of “everybody improves whole systems.” But she then

essentially rejected the strategy of getting the whole system in the room in specially structured ways as a means to that end. “I am not trying to gather in one place a ‘microcosm of the whole’ . . . but rather working as part of loose webs of relationship both legitimate and spun through a multitude of other kinds of relating” (p. 145).

It may be that Shaw’s critique veered off too one dimensionally into dialogue, with the risk of no overarching work task driving the focus of conversations. It may be that such an approach to dialogue may be too loose and *not timely enough* for broad change, when needed under “realife” conditions – responding to the demands of markets, missions, and milestones and as felt by a mass of organizational or community members themselves. I have seen these flaws in large-scale dialogue efforts where there was either a failure to sufficiently stitch together heterodox dialogue for explicitly desired enterprise effect or where the dialogue itself broke down into programmatic vaporware. And it may be that this conversational flow does not create enough leverage for strategic or structural impact that can improve people’s lives and collective outcomes. If so, the need for more concentrated interventions, Future Search and others, will persist. Indeed, perhaps Future Search, as a structured event, may in the end be but one in a battery of enterprise interventions – including coaching, counsel, strategy, team building, other pieces of work redesign, teaching, and he like, *conceived in terms of their systemic effects* – needing to be synchronized to help organizations move through large-scale change. I have often worked this way myself, and Weisbord’s partner, Tony Petrella, was explicit in this in the course of his whole system consulting work. My own experience and graduate studies led me to see that the consultant, if he or she is to remain engaged, needs to follow the path of resistance as it presents, working backward until the core of the systemic difficulties, often denied, surface and can be more fully handled (Goldberg 1993).

Perhaps Shaw’s understanding veers in the direction that Weisbord himself anticipated in his understanding that large-scale conferences are *not* the end of history. This may prove especially so in their ability to cope with the speed of change ushered in by ever-increasing technology innovations and the diversification of organizations into ever flatter, more dispersed, and complex network forms. And if Shaw can demonstrate that her approach helps people gain control over changes in work processes, policies, systems, structures, and technologies that benefit people widely, hers may be one of the voices at the new frontier.

One of Shaw’s similarities to Weisbord is that her thinking arose from her queries to herself, working as a practitioner. Theory came after practice, including wrestling with the ideas of those who preceded her in light of her experience. So, in a way, we come full circle to Lewin, the practical theorist. This would have a certain joy for Weisbord, who embodied the very life of action research.

When I asked Weisbord what he saw as the future of OD, he gave me his frequent answer: that OD can be anything that anyone calls OD and that helps people in organization or community progress. “Who really knows what OD is?” he asked. “OD has had an ‘identify crisis’ as far as I can remember (Personal communication 2016).”

But Weisbord also has what might be called “a hope within a hope:” that OD, at its best, has something more to it than that. He told me that he thought OD, for all of its heterogeneity, lacked “a kind of ribbon around it” to give it shape and greater value. Amidst the scads of techniques and models, he thought that the missing ribbon was “action research,” a way of approaching life with an open heart and mind, curiosity, and reflection on inner and outer things – helping people find greater meaning in their lives and work. That ribbon served him well throughout his own journey. With a little luck – and grace, perhaps – a kind of rediscovery of action research might be possible. Might today’s very moment of massive economic, technological, and institutional change point to a renaissance of action research?

Helping people study and improve their own situations seems to me worthy work, if someone will pay for it. We used to call that “action research,” the part of Lewin’s great legacy that remains for me fresh, flexible and adaptable. You can do action research on any aspect of organizational life. You just need people who want to do it. If the next generation learns how to adapt action research, that would be a great blessing.

Making the world better one person, one meeting, one organization at a time could keep you psyched for a lifetime. I believe that all work that fulfills you and helps others is existentially valuable. (Personnel communication 2016)

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