Leadership Training Institute

Consultation Skills Workshop

Participant Manual

Commitment - Competency - Emotional Maturity

2003, 2008

CONSULTATION SKILLS TRAINING

Lab Objectives:
1. Learning and improving your use of the steps in the consulting process
2. Assessing and improving your own skills, awareness of your consulting style, ethics, needs, and assumptions in consulting, etc.
3. Increasing your awareness of and skill in managing the dynamics among the client, consultant and needs of the work situation; including a collaborative mode of inquiry, and the ability to form authentic helping relationships in client systems
4. Being authentic in the consulting role; becoming more comfortable with the use of "self" in consulting

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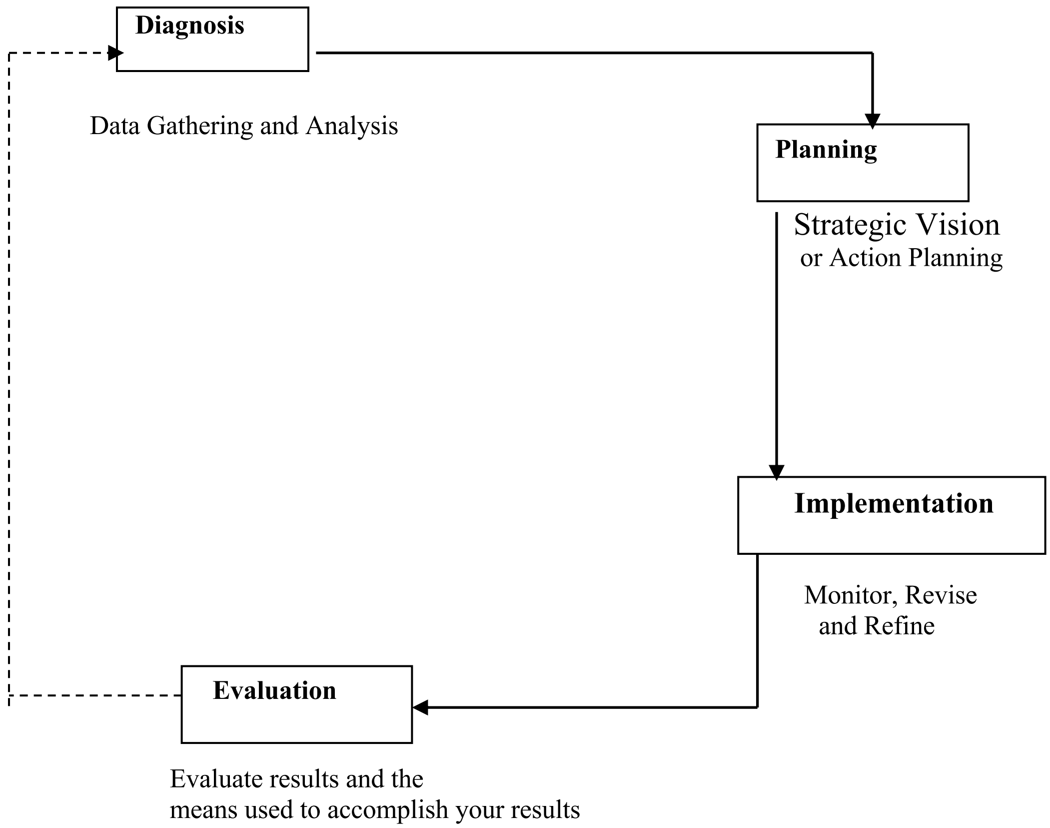
The manual is made available to LTI for use in its consultation skills lab by Robert Gallagher. For more information go to www.CongregationalDevelopment.com

A PROCESS OF PLANNED CHANGE

The core process of planned organizational change can be described as four steps: diagnosis, planning, implementation and evaluation. It is an organizational improvement process.



To move through the steps or phases of the process you need to be clear about the scale and type of change being proposed. This sets the context for the whole process. Is this a long range attempt to change the service or product, increase productivity or transform the organizational culture <u>or</u> is this a more limited venture such as training employees to gather information from customers on the quality of the product and service, team building with a staff or enabling members to create their own discipline for self care or spiritual development.

It may help to identify what kind of planning will be used. That will shape the diagnosis step. Is this process to create an action plan for staff development, is it a strategic vision to guide the total organization for the next three years or is it an operational plan for the coming year.

In preparing to move through the phases of the process it may be helpful to use a chart.

Phase	How To Do It	Who To Involve	Schedule
Diagnosis - Data Gathering - Analysis			
Planning			
Implementation			
Evaluation			

Leaders have the primary responsibility for structuring, initiating and facilitating the process of planned change in the organization. Organizational leaders have the legitimate authority needed to launch a variety of planned change efforts.

The job of a consultant is to help the leadership facilitate the change process. The consultant may coach the manager, co-lead parts of the process or facilitate the whole process. Internal change agents may be concerned with influencing specific parts of the process

PROCESS OF PLANNED CHANGE WITH A CONSULTANT

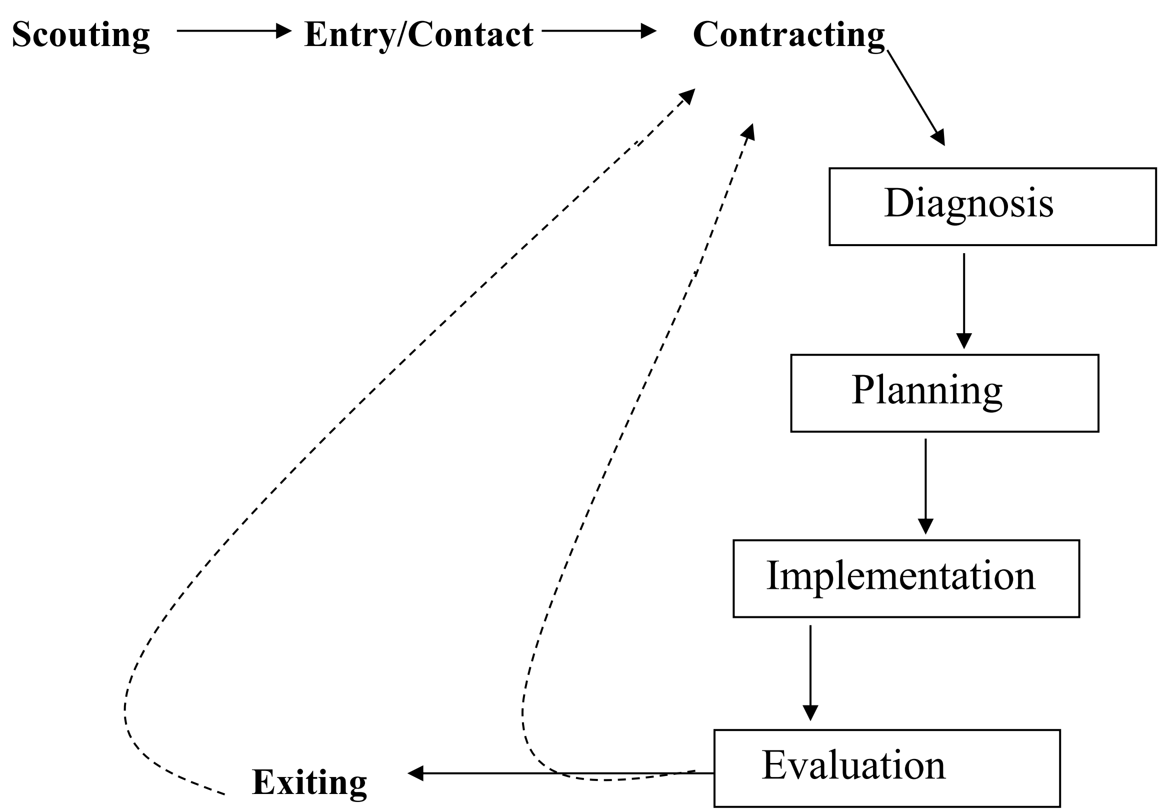
When a consultant is involved in helping the manager and organization in the change process there are additional steps to the process.

Before diagnosis:

1. Scouting - this involves the manager seeking a consultant or from the other end, the consultant seeking a client.
2. Contact and Entry - developing the relationship, making initial assessments, explore readiness for change.
3. Contracting - finding out what the client wants, what the consultant wants and making an agreement.

After evaluation: exiting - withdrawing from work with the manager and system. Re-contracting may take place after the evaluation if continued consultation is needed. Re-contracting may also take place after time has passed and the client requests new work.

The Process of Planned Change with a Consultant



SCOUTING

The objective of scouting is to create a pathway by which potential clients can contact you to do the type of work you do.

Defining the work you do

You need to be clear about the work you do. Here are some of the issues involved in defining your consulting practice.

1. Competence -- What do you have the training and experience to do well?

2. Commitment -- What type of work interests you? What type of work are you willing to do?

3. Lack Competence for -- What type of consulting work are you not able to do with adequate competence? Where would you be "in over your head"?

4. Low Interest or Willingness -- What work has little interest for you? Is there work you would be unwilling to do?

5. Geographical Scope -- How far will you travel?

6. Type of Organization -- What type of organizations are you willing and able to consult with?

7. Strengths -- What are your strengths as a consultant?

8. Weaknesses -- What are your weaknesses as a consultant?

9. Values -- What are some of your core values? How do they relate to your consulting work?

10. Contribution -- What contribution do you want to make as a consultant?

11. Achievement -- What do you want to achieve? How large a practice: income level, clients, staff/partners, etc.?

Shaping the Image People Have of You as a Consultant

Potential clients do have an image of you. It's made up of the sum total of their impressions and ideas about you as a person and as a consultant. You can take some responsibility in influencing that image.

Positioning

You need to set your consulting practice apart from others. Why would a potential client call you rather than someone else? The task is to position yourself in a way that builds on your strengths, fits your self definition as a consultant, reflects a realistic image and is sustainable over a long period of time. Clients may choose you because of perceived competence, or they like your values, or they think you understand them or their organization, or they may like your fee or think you are more available.

Communication

This is the pathway by which potential clients can contact you to do the type of work you do that also fits the work they need done. The single most important form of communication is a word of mouth recommendation from an existing client to a potential client.

1. Develop a list of potential clients. Identify the people and organizations you could reach out to, directly or through someone else.

2. Let existing clients know about your availability for more work.

3. Write articles for magazines or journals. Write a book.

4. Develop a list of services you provide. Give it to new clients, their board members and managers.

5. Have a reasonably current resume available in case a potential client asks. You may want to create a resume that is oriented to consulting work.

6. Network with other consultants.

7. Consider creating a web site - sites are unlikely to produce new business but may help potential clients better understand the scope of your services and the approach you take to consulting.

8. Get stationary and business cards.

CONTACT AND ENTRY

Objectives in Contact & Entry

1. Begin to develop a trusting relationship with the client.
2. Do an initial assessment of the organization, the proposed work, and the organization's readiness for change.
3. Explore and decide your ability and willingness for working with this client. Is your involvement likely to help? Are you interested?
4. Identify next steps.

First Contact

Contact and entry usually begins with a phone call or an e-mail message. The potential client was referred by an existing client or heard about your work with a particular organization. Sometimes the potential client has had direct experience with your work, e.g., she was on the board of an organization with which you worked last year; she wants to explore the possibility of you working with the organization she directs.

The phone rings. A potential client is on the line. Stop! Ask yourself if you are prepared to have this conversation now. It's best if you can be responsive at this point. However, if you are distracted or ready to run off to another appointment, it is better to set a time to talk later.

Possible areas to explore in the initial talk:

1. The client -- What does the organization do? Customers, clients, membership? How large -- staff, budget, membership? Faces what significant opportunities, threats, limitations?
2. The project being proposed; background -- why this project? history? Is the project for a strategic vision/plan; for the whole system or subsystem; yearly planning, program planning, an OD project?
3. How they got your name
4. Your consultative style, fees and expenses, references
5. Set up an exploratory meeting -- time, location, who will be present. Take initiative in this. Be sure the right people will be present (participants in the problem/opportunity, authority to make a contract, etc.) Ask for the time you think you will need. Be clear with the potential client about any fees or expenses for this meeting.
6. Ask them to send background documents on the organization, e.g., mission, values, vision or plan, PR materials, etc. Get the organization's web site address.
7. Ask the potential client to do some background work, e.g., ask them to look at your web site or material you will send; give names of former/existing clients they can talk with; possibly send them to a site that helps them become more familiar with your field, etc.
8. It is possible that the work to be done is so clear and has a limited time frame that you may have a contract after the initial contact.

After the initial contact:

- How do you feel -- about the person you spoke with, the organization, the proposed work?

- Do a readiness assessment (see below)

- Are you ready to go ahead? If not, what do you need/want?

Assessing Client Readiness

During the contact and entry stage, the consultant needs to assess the client's readiness for the proposed project. After the initial contact and after (or during) the exploratory meeting, the consultant can review these issues:

1. The degree of openness -- does there appear to be a willingness to share information, investigate rather than assume, explore options, etc.

2. Makes sense -- there seems to be something to work on that makes sense to you

3. Appropriate use of a consultant -- what you are hearing about your role seems appropriate; you are not hearing assumptions about your role that concern you, e.g., client sounds too dependent or too counter-dependent, seeking a "quick fix", wants your affirmation of an already established course of action, etc.

4. Investment -- the client is ready to invest the necessary time, funds, people, etc. to set this up for success

The Exploratory Meeting

Those involved in the meeting should be:

- High up enough in the system to influence others
- Able to make a contract
- Familiar with the organization and the background for this project
- Open to using a consultant

Specific objectives of this meeting:

- Review the overall objectives for contact and entry (above). Focus on particular objectives as seems needed, e.g., if you are concerned about their "readiness" you could lead them through a readiness assessment.
- Exploratory meetings are often also contracting meetings. See the contracting section.

Contracting

In contracting, you are negotiating expectations for your relationship with a client. You are trying to find out what the client wants, to be clear about what you want, and to come to an agreement of what you will do together.

A. You need to find out what the client wants.

Initially, the client may appear to be very confused and muddled, or may seem clear and decisive. If she's uncertain about what she wants, your job is to help her increase clarity. In some cases, this may mean developing a contract to help the client become clear about what she wants to work on (sort of a pre-contract contract). Even if she seems relatively certain, you will still want to help her look more deeply at the implications of the work she's interested in doing.

1. You will need to use some means for eliciting the client's expectations. You might try some of the following questions. In time you'll develop your own list.

- What do you want to happen as a result of our work together?
- What do you want from others in your system?
- What do you need to do to get what you want?
- What do you need to change about you to get what you want?
- What do you want from me?
- What don't you want from me?
- What's the best/worst thing that could happen in our work together?
- What's your payoff/cost for things staying the way they are?
- How will you know when we're done?
- How might you sabotage yourself?
- What are you willing to do not to sabotage yourself?

2. Instead of asking questions, you might try testing your hypotheses. Tell the client what you imagine she's most interested in having happen, or what you've heard her say about the best thing that could happen. Make a statement, then check it out with the client. Testing hypotheses can reduce the wariness and defensiveness that can build when asking question after question.

3. Is the client trying to use you for some hidden reason? Is there someone she wants fired? You find your real contract being to help the manager get up her courage, or to help gather the data that will show the firing to be justified. Or is she hoping that you will come to her support in some ongoing struggle between her and the Board or the staff, and hoping that you will help show how wrong they've been and how right she has been? Such hidden agendas are traps for the consultant and client alike.

4. Find out more about the organization. You may need to know more than you discovered in the contact and entry stage. You need to know enough to make a sound contract and to begin the diagnosis step. There is likely to be some repetition, e.g., you might do a broad system assessment with an exploratory – contracting group and then do the same assessment later with a larger group.

B. You need to know what you want.

Take time to identify your own hopes, desires, fears and needs regarding this contract and client. What's the best/worst thing that could happen for you? Share and negotiate as appropriate.

Review what the client wants from you. Are you willing to contract for that? Do you want to work with the client? Do you have the energy and excitement for it? Do you have the skills? Are you free to say "No"?

You need to know what you need from the client to "set it up for success." Your own awareness and assertiveness are important in contracting. You need to know what you want from the client and be able to ask for it.

A good bit of your contract is worked out in the give and take of "A" and "B" above. You are seeking an adequate level of mutual confidence that you can work together on this particular project.

C. Making an Agreement

1. Being Clear

Consultants handle this in a variety of ways. Some like to put everything in writing. Others only put it in writing if the client requests it or if they are still uncertain about how clear the client is, or if the contract is complex. Using newsprint to record elements of the agreement in public may help. Using communication skills of para-phrasing and summarizing may be adequate. If the agreement is being made over the phone, take notes for yourself so you don't forget what you've agreed to.

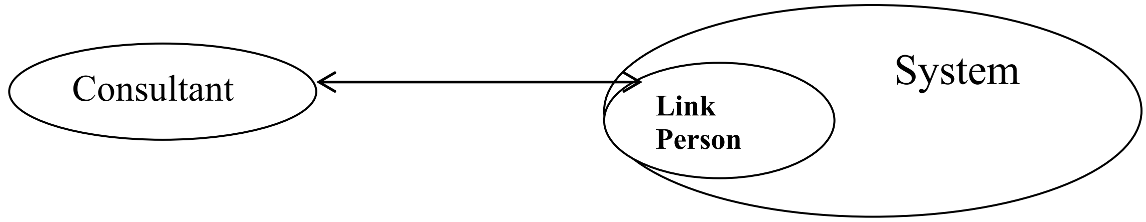
2. Things to be Clear About in an Agreement

- The objectives of the consultation.
- Who will be involved; how they will be recruited/informed.
- Location
- The process and methods to be used.
- The style in which it will be done.
- Time frame, schedule.
- Consultant fee and expenses.
- Possibly, lists of things the client and the consultant have agreed to do in advance of the intervention or as part of the intervention.
- How the relationship will be terminated, e.g. time for mutual assessment of the work, understanding on early termination, etc.

3. Does this Person Have the Authority to Make an Agreement?

D. Types of Contracts

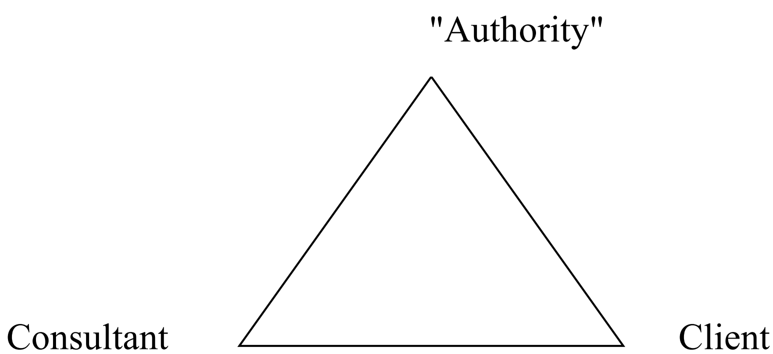
1. Responsible to work with the system (an organization or group). Need to be clear about which person or small group is your connection with the system.



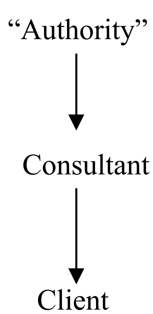
2. Responsible to work with a leader/manager. This may be a coaching role in regard to the person's behavior as a leader/manager. The system may or may not be aware of the contract.

A danger in this type of work is that you end up focusing <u>only</u> on the issues in the organization rather than on the leader/manager's behavior in the organization.

3. A "three-way contract" in which someone with legitimate authority is sending you to work with a group or organization. The consultation is to some extent "forced" or required.

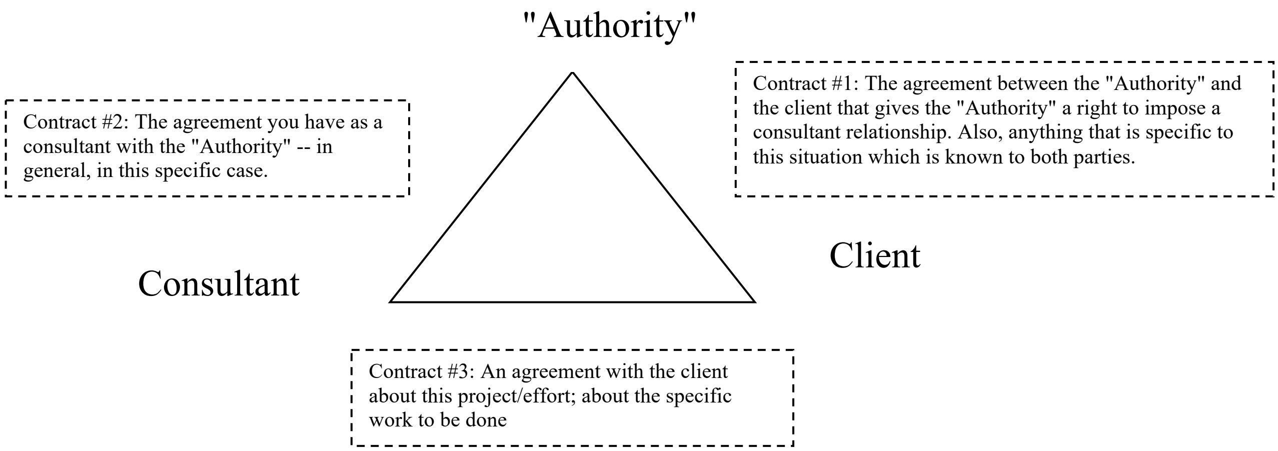


The danger is this will be perceived as:



Managing a “three-way contract” can be done by:

a. An awareness of the basic triangle - by each of the parties. It is the consultant’s job to share the triangle and the three “contracts” that are involved.



b. In clarifying your relationship with the client you might try:
   1) Sharing the triangle.
   2) Sharing the contract (#2) that you have with the “Authority” - “Here is what I’ve been asked to do. These are the agreements I have with the ‘Authority.’ ”
   3) Ask about the relationship and any agreements (Contract #1) between the client and the “Authority” - “What have you been told? What do you expect?”
   4) Then focus the conversation on working out the agreement between you and the client (Contract #3) - “What would you like? Where might we start? etc.”

c. If there is so much anger about doing the consultation that it will be difficulty to move ahead, try:
   1) Having a meeting with the client and the “Authority” present.
   2) Take them through the steps in “b” above. Help them to acknowledge the feelings involved.
   3) Test out with the client a possible agreement for your work together (contract #3)

4. Shadow consulting in which you are consulting with someone who is a consultant to someone else. That party would not normally be aware of your existence in that role.

This relationship shares the same potential problem as mentioned in #2 above. Your client is the other consultant. The focus of your work together needs to be on your client's functioning; her commitment and competence level; her behavior in the relationship with her client. You might help your client reflect on her work, explore alternatives, clarify her feelings, etc. You might do some coaching or help her design some of the work she will do with her client. Be careful about how much of your time together is given over to discussing the issues and dynamics of her client. It is necessary to some degree. But it can also be a trap.

E. Client Categories

Schein answers the question "who is the client?" by using a set of categories, which addresses the fact of multiple clients and shifts in the contract.

- Contact clients - the initial contact person
- Intermediate clients - a group that may be involved initially and have a reduced involvement later, e.g., top management, a strategic planning committee, etc.
- Primary clients - where the interventions are made; those who "own" the problem.
- Ultimate clients - others in the organization and external to the organization who are affected by the interventions.

F. Contracting is a Continuous Process

1. Some contracting work is done in the "Scouting" and "Contact/Entry" phases of the relationship. Your description of the scope and style of your work in a brochure or over the phone sets the basis for building the contract. Who is included in the first exploration influences the development of the contract.

2. Throughout the consulting process the consultant and the client will make dozens of mini-contracts that shape a specific step or revise the original contract.

3. The consultant's own awareness and assertiveness is critical in the contracting process

At every step the consultant needs to be open to hearing the client's needs, hopes and desires; has to know what he or she sees as needed to keep the work going well; and needs to be able to ask the client for what is needed from the client (e.g., time, money, access to information or people, a change in the client's behavior or role, etc.).

Diagnosis

In the diagnosis step the organization is doing two things:
1. Gathering information
2. Engaging in an analysis of the organization's situation, opportunities, problems, etc. A target might be to identify the current situation, the desired situation and the forces involved.

A. Gathering Information

1. **Methods of Data Collection**
   - Interviews (group or individuals)
   - Survey/Questionnaire
   - Observing/Sensing/Intuitive "hunches"

2. **Use of a Model or Conceptual Framework**
   Using a "lens" to gather information gives us a way to organize the information and identify patterns and issues quickly. A model might be used in the method of data collection or used to discern patterns from a more open-ended data collection process. It is important to fully understand the model being used and, to the extent that the model is normative, to be comfortable with the model's values and assumptions.

3. **Useful Information**
   We are seeking information that can be used in the development of the organization. So, the information we gather needs to be:
   - something the organization can use to effect change
   - able to be shared openly; "confidential" information is rarely useful
   - related to an area you are willing to make changes in, i.e., don't ask for information you are not going to be willing to act on.

B. Analysis

1. **Use Models and Conceptual Frameworks**
   Using models allows us to see a broader, more integrated picture. It may be helpful to use several models in developing your "hunches", "wonderments" and hypotheses.

2. **Explore Options**
   Investigate the process/opportunities/problems. Avoid jumping to solutions. Create several approaches or possible solutions.

3. **Stance**
   There are a few mental\emotional stances you need to take
   - Participant/observer or Anthropologist
   - Servant
   - Loving critic of the organization (not unloving critic or uncritical lover)

4. **Attention to the Dynamics**

Assess issues such as:

- How open is the organization to its own information?
- How open are leaders/participants to hearing each other's information?
- How open are they to information about external forces?
- How open are clients with the consultant (if any)?

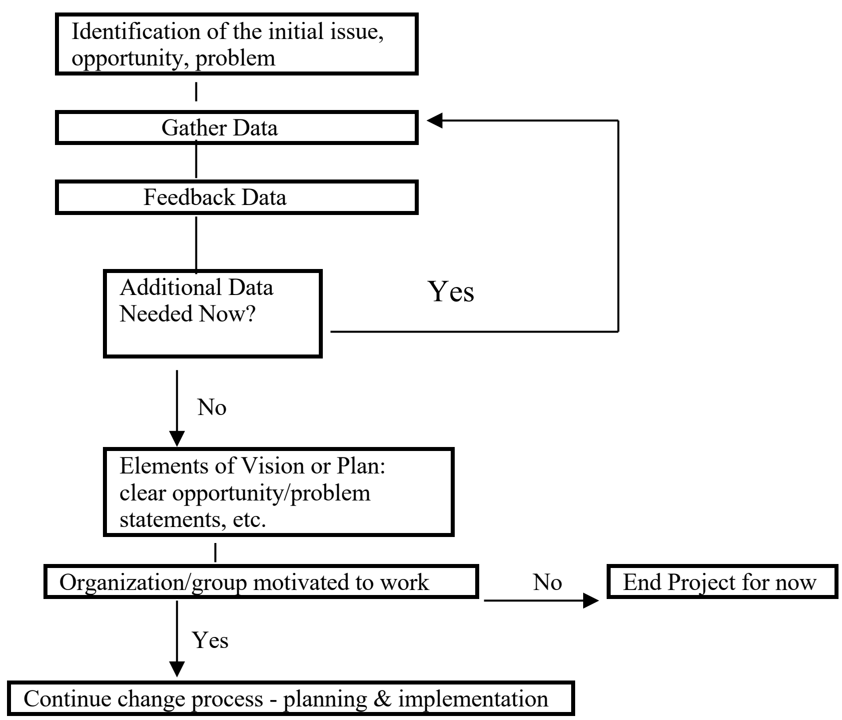
C. Building the Organization's Capacity

Diagnosis is in itself an intervention in the organization's life. How it is done can help the overall process or set it back. Three actions that help people's sense of commitment, skill and knowledge are:

- Publicly sharing the information you receive.
- Teaching conceptual models you are using in the analysis.
- Inviting people to join in shaping the information gathering and analysis process.

D. "Let the Data Speak"

Diagnosis involves data gathering; the interpretation of the information, and the identifying of developmental projects, strategic visions, goals, problems to solve, etc. The commitment of people in the organization to the change effort is critical for success. Is the data compelling? Will it motivate people? Diagnostic feedback is intended to increase readiness for strategic change and incremental improvement.



PLANNING

A. Objectives

1. Planning provides a sense of direction for the organization. It can motivate.
2. Planning gives shape to that direction through images and action statements.
3. Planning is an educational tool. It can help unify an organization.

B. Moving from diagnosis to planning

1. Sense of direction and priorities -- Your diagnostic work needs to be given focus in a set of statements that define an overall direction. It is a statement of what the organization will be and do.

2. Format -- Decide on a format for the written statement, e.g., mission statement, vision statement, strategic plan, project or program description, etc. Select categories to use for organizing your work. (See materials on "Outlines of Strategic Vision/Plans" and samples.)

C. Explore Options and Likely Consequences

1. It will produce a sharper sense of direction if there is an exploration of options for the vision, goals, strategies, solutions, project, etc.

2. At various points in the process, it is useful to project out likely results and consequences of a direction. How will it impact various subsystems of the organization? What role will each need to play? How are people likely to be affected? What is their likely response?

D. Revisit the Question of the Type of Planning

What kind of planning is involved in this situation? A strategic vision or plan, a program plan, an organization development project/intervention, yearly working objectives, etc.

E. A Strategic Vision

There are a variety of ways in which a vision might be created and drafted. Visions may be broad descriptions of an organization's hoped for future or more detailed presentations of how we will look and be in the next few years. Some visions draw more on images (e.g., "partnerships"), others on more of an icon (e.g., who the founder was, what the founder said.) Strategic visions may be most useful if they:

1. Include both what we are going to accomplish in production or service and who we are going to be.

2. Express the best values, hopes, and ideals of people with a stake in the organization.

3. Describe the organization at its best.

4. Show a gap between what "is" in the present and what is hoped for in the future.

5. Is grounded in the past and present life of the organization. If it is to be a vision and not a fantasy, it needs to be grounded in the history, strengths, weaknesses, and opportunities of the organization.

Visions can especially be a tool to enable:

- Self management -- Individuals and teams can use the vision as a guiding resource that can be used to align their work to the larger organization and other working units.

- Commitment -- Visions are meant to engage our passion and increase our commitment.

- They need to be exciting, to get us going.

In the September - October 1996 issue of Harvard Business Review, James Collins and Jerry Porras wrote about "Building Your Company's Vision." Here is their opening sentence: "Companies that enjoy enduring success have core values and a core purpose that remain fixed while their business strategies and practices endlessly adapt to a changing world." They present an approach to vision that proposes two major components:

1. Core ideology consisting of -
   - Core purpose, reason for being, e.g., to preserve and improve human life; to make people happy
   - Core values which are few in number and stand over time, e.g., honesty and integrity, social responsibility, etc.
2. Envisioned future -- which is a picture of what we want to become or to create and which will require significant change in the organization. The suggest or envisioned future that includes
   - BHAG's (or Big, Hairy, Audacious Goals) -- this is making a commitment to a clear, compelling, 10-30 year, huge challenge that will both engage people's imagination and change the organization's life
   - Vivid Description which creates a clear picture of the BHAG in people's minds

Another approach to envisioning is to create a statement with a three to five year time frame that includes:

- Mission -- the business we are in now
- Core Values -- which guide long term life and direction
- Goals -- to achieve in the next few years related to productivity
- How We Will Live Together -- statements that describe the quality of life we seek together

F. Strategic Planning

As with strategic envisioning, the concerns are long range, systemic, significant capacity building or a crisis that threatens survival. In practice, there may or may not be much of difference between strategic envisioning and strategic planning. It is usually a mistake to expect hard and fast definitions here. Planning manuals seem to differ in their defining of planning tools and concepts.

Planning usually implies more attention to establishing long range goals and objectives. In this case goals being broad statements of results or outcomes and objectives being aspects of a goal that are stated in a clear, measurable and time limited manner.

In strategic envisioning or planning, it is important that the top leadership be directly involved in drafting the final document. This is a way of requiring leaders to think through, integrate and own the direction.

G. Operational Planning

Operational planning is used to make a strategic vision or plan operational. In the absence of a long range vision or plan, it may simply be an organization's annual planning process which establishes the yearly activities for an organization.

Operational planning usually takes one of the following forms:

<u>Annual plan</u> -- Specific goals and objectives set to help the organization move toward its strategic vision or plan during the coming year.

<u>A five year plan</u> -- Or it may be a three or four year plan. Some organizations like to work out a detailed year by year plan for moving toward their vision. If it is anything more than collected thoughts to possibly use in future years, it has the danger of locking the organization into too much detail and producing an inflexible response to changing conditions or needs.

Team planning -- Have each team or department do a yearly plan that is responsive to the overall vision/plan.

H. Organization Development Intervention/Project Plan

This is an action - plan (see "I") for an OD intervention/project. It might be an action plan for team building, conflict management, trust development, training in problem solving methods, training team facilitators, an action research process (in itself a form of the process of planned change), leadership coaching, intergroup cooperation, etc.

I. Action Planning

Action planning is used for taking quick action on a project, program, intervention, etc. Useful questions and method may be:

- What are the first three steps we need to take?
- What is something we can do in the next few days to move this along?
- Using force field analysis as a strategic formation method.
- Deciding on a general course of action along with the sequence and timing of steps.
- Use a chart.

Action	How	When	Who	Resources

Implementation

Implementing the plan is a time of transition into a new way, a new state of being for the organization. Managing that transition is the task.

Stay Focused on the Vision-Goals-Direction

The primary aspects of the plan need to be kept in front of the organization – post it, frame and hang it, expect people to know it, have leaders present it again and again.

Leadership

The leadership task includes:
- Keeping the new direction in front of the organization
- Showing commitment oneself (including dealing with one's own internal resistance to the change or one's role in facilitating the change)
- Asking others to commit themselves.
- Managing the political process involving various interests affected by the change.

Monitor the Process of Change

1. The organization needs a way to monitor the change process. This might include
- Providing time at the board or management team meetings to review progress.
- Having a team gather information and propose adjustments.
- Using a consultant to work with key leaders in reflecting on the implementation process.

2. Monitoring during implementation is an early form of the evaluation stage. You want to review all of the same issues you will deal with during the evaluation.
3. Many difficulties in the implementation phase can be traced to unresolved issues in earlier stages of the process, e.g., not involving relevant people in the entry or diagnosis steps.

Communicate – Communicate – Communicate

The implementation phase is a time to over-communicate. Keep repeating the vision, why we are making these changes, what is being changed, and what is not being changed. (People cope better if they know some things will remain stable, for now.) Provide regular updates on progress and difficulties.

Include People

Include people in implementing the plan. This can help reduce resistance, increase commitment, and provide needed creativity and energy. Leaders need to seek ways for people to play a role in the new direction.

Care needs to be taken in regard to the few people who are unable or unwilling to collaborate. Leaders need to beware of the danger of getting drawn into an emotional drama in which they try to convince or even force the strongest resistors to join in the effort. The whole organization can be held hostage to the sabotage of a few people. While leaders work overtime trying to bring them along, the organization remains stuck.

Help People to Define Success

Defining success during the implementation stage is critical to helping people stay motivated. For that to happen it's important to take initiative in defining the signs of success at this stage.

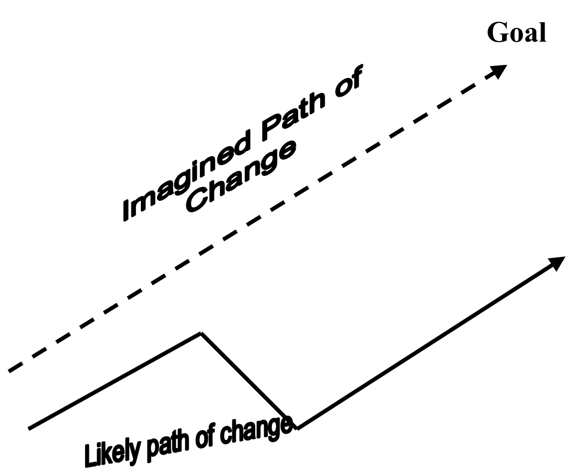
- Acknowledge publicly each movement toward the vision, each event that advances the new direction.
- Be clear that success does not mean fewer issues, problems or opportunities to deal with, but new and different ones. Remind people of this process. As old issues fade and new ones emerge, hold it up as progress.
- Success will mean an increase in our standards, expectations and hopes. This is likely to show itself as an increased dissatisfaction with the organization or the progress being made. Also there is a phenomenon noted by Maslow of complaining shifting from "grumbles" about small things to "meta grumbles" about broader, long term issues.

It Will Not Go the Way You Imagined

Implementation will not go the way you imagined it would. Even if leaders have told themselves this "truth"; it will still come as a shock to experience the confusion, resistance, anxiety, slowness, twists and turns and unanticipated consequences of the change process.

One way of understanding what is happening is the "nose-dive syndrome"; another is in terms of resistance to change.

Nose-dive Syndrome



Karl Albrecht suggests that there is a "nose-dive syndrome that frequently happens when implementing major change. It goes this way – the leadership assumes that all will go well in the change effort. In fact things get worse. People resist, grumble, fight and generally play the victim or cynic in regard to the proposed change. Resources that were to be available are slow in coming. Key people get caught up in other demands and give less attention to the effort. Productivity and employee or member satisfaction declines instead of improves.
The nose-dive doesn't always occur, but when it does, the organization's leaders face the choice:

- "this was a mistake; we misjudged what was possible" or
- "our reading of the situation and the possibilities is mostly correct; there will need to be some adjustments; but if we stay with it we will reach the hoped-for results."

Resistance to Change

Resistance is likely as changes begin to take shape and impact people's lives or that impact is anticipated. What may have been a vague uneasiness earlier becomes a fear of loss. Some who were initially in favor of change may become restive. The sources of resistance are likely to be multiple – social networks are disrupted, influence patterns change, reward systems are rearranged, there may be a sense of uncertainty about the future. The organizational culture – "the way we are and how we do things here" – may be seen as threatened.

Resistance will be reduced if the issues identified earlier are effectively addressed, e.g., clear vision/direction, leadership, a monitoring/management process, communication and including people. It is also important to listen to the resistance. There may be information in the resistance that can improve the change project.

Reinforcing and Stabilizing Change

Systems have a tendency to function like rubber bands. They are stretched under pressure, once the pressure is released they snap back to the original shape. Organizations tend to revert to old behavior patterns unless efforts are made to institutionalize the changes. For example:

- Have a team continue monitoring and reinforcing the change.
- Key leaders need to "check in" occasionally on how well the new ways have become part of the organization's life.
- Train people in the skills and knowledge needed to competently function in the new way.
- Provide adequate resources.
- Change related policies and practices.
- Reward teams and individuals for making the new way work.
- If necessary, remove extreme resistors from positions of influence.

EVALUATION

Evaluation Objectives

1. To see where you are and what to do next
2. To assess the effectiveness and value of the process you have completed
3. To learn from your experience, e.g., to increase your skills and knowledge for managing a change process
4. To help people in the organization integrate the changes that have taken place

What to Evaluate

(This should have been determined in the planning stage.)

1. Movement in terms of the planned outcomes (goals, objectives, hoped for results, etc.)
    -- Improved, worst, the same?
2. The process of planned change
    -- Diagnosis, Planning, Implementation -- how well did we do in each stage?
3. You might use a system diagnosis tool in reflecting on your work
    --For Example: Use "Six Primary Elements of the System" -- Vision, People, Dynamics, Structure & Processes, Leadership, Environment
4. If a consultant was used -- Develop a mutually agreeable way to assess the consultant's work.

How to Evaluate

- Decide on ways to gather information, ie, interviews, survey, observations/sensing.
- Decide on who to involve -- Who will need to act on the results?, Who would you like to be influenced by the evaluation process and results? Who might provide information or opinions? Who might best interpret the information and draw conclusions on behalf of the organization?
- Decide on who should see the results.

Next Steps

The evaluation team needs to look at two follow through areas.

1. What do we need to do to continue reinforcing and stabilizing the change?

2. Is this the time to terminate (for now) the formal process of planned change? Or, does the evaluation suggest the need to return to an earlier stage for additional work?

Celebration

Take time to celebrate what has been done together. Acknowledge special efforts and contributions to the work.

EXITING

The consulting relationship is by its nature temporary. It is intended to both address the client's stated, current problems and visions; and also to improve the client's ability to adapt, learn, and solve problems. If the client is not to become overly dependent on the consultant, there needs to be a clear exiting process.

Working yourself out of a job

The temporary nature of the consulting relationship can help keep the consultant focused on building the capacity of the client system. The improved functioning of the client is to be internalized by the client and not dependent on the consultant's presence.

The dynamics of exiting are not as clear for an internal consultant who continues to be part of the organization's daily life. Exiting is from a specific department, event, or project.

Working yourself into a job (the external consultant becomes "internal")

There are situations where the external consultant may play a role in the organization's life that calls for special attention to the issue of dependency and building the client's capacity. For example --

• The consultant is asked to lead each year's board or management team retreat. It becomes predictable.

• The consultant is asked to function for the long term as a trainer of new staff, facilitator of special meetings, coach and co-strategist with directors and managers, etc.

Such situations often serve legitimate client needs. However, they also require special attention on the part of both client and consultant. The consultant may need a shadow consultant to reduce the extent of absorption into the organizational culture. Exiting rituals can be modified and used. The client should be asked to evaluate the relationship with a team or another third party without the consultant being present.

Exiting Rituals

1. Reduce presence -- As the contract moves into its last stages, the consultant usually needs to begin to reduce the amount of time with the client system. Don't disappear suddenly like "the Lone-Ranger"; also don't hang on, and on, and on.

2. Assess -- Provide a process for assessing the consultant's work, the work done together, and the relationship. If some of this has happened in the evaluation stage, this should be a brief review of that assessment.

3. Celebrate -- Seek some way of celebrating the work and the relationship, e.g., have dinner with those you have worked most closely with or simply ask everyone present in the last meeting to applaud for the work done together.

4. Follow up letter -- It may be appropriate to send the client a follow up letter or note that says thank you for the opportunity to work together.

Success and Failure

Success feels better than failure. If the project has "failed", there may be a tendency on the part of both the consultant and the client to avoid an assessment and avoid each other physically and/or emotionally. The consultant will serve both client and self by engaging the exiting rituals as much as possible. There is something to be learned in the failure. A good exiting process can also enable each to move onto future work with less "unfinished business."

There is also a danger that if the consultation is seen as successful, people may see no need for a real assessment or may want to avoid any critical comments toward the end of the relationship.

What is OD?

Standard Definitions of Organization Development

Two Early Definitions

“Organization Development is an effort planned, organization-wide, and managed from the top, to increase organization effectiveness and health through planned interventions in the organization's 'processes,' using behavioral-science knowledge.” Richard Beckhard, “Organization Development: Strategies and Models”, 1969

"Organization Development is a response to change, a complex educational strategy intended to change the beliefs, attitudes, values, and structures of organizations so that they can better adapt to new technologies, markets, and challenges, and the dizzying rate of change itself." - Warren Bennis,1969

More Recent Definitions of OD

“Organization Development is the attempt to influence the members of an organization to expand their candidness with each other about their views of the organization and their experience in it, and to take greater responsibility for their own actions as organization members. The assumption behind OD is that when people pursue both of these objectives simultaneously, they are likely to discover new ways of working together that they experience as more effective for achieving their own and their shared (organizational) goals. And that when this does not happen, such activity helps them to understand why and to make meaningful choices about what to do in light of this understanding.” - Neilsen, “Becoming an OD Practitioner”, Englewood Cliffs, CA: Prentice-Hall, 1984, pp. 2-3.

"Organization Development is a top-management-supported, long-range effort to improve an organization's problem-solving and renewal process, particularly through a more effective and collaborative diagnosis and management of organization culture-with special emphasis on formal work team, temporary team, and inter-group culture- with the assistance of a consultant-facilitator and the use of theory and technology of applied behavioral science, including Action Research." - French & Bell 1990

"Organization development is a system-wide application of behavioral science knowledge to the planned development and reinforcement of organizational strategies, structures, and processes for improving an organization's effectiveness." - Cummings and Worley, "Organization Development and Change", 1997

"Organization Development has been defined as a series of planned processes by which human resources are identified, utilized, and developed in ways that strengthen organizational effectiveness by increasing problem solving capabilities and planning" - From The Organization Development Institute web site

"Organization Development (OD) is the process of improving organizations. The process is carefully planned and implemented to benefit the organization, its employees and its stakeholders.

The client organization may be an entire company, public agency, non-profit organization, volunteer group - or a smaller part of a larger organization.
The change process supports improvement of the organization or group as a whole. The client and consultant work together to gather data, define issues and determine a suitable course of action. The organization is assessed to create an understanding of the current situation and to identify opportunities for change that will meet business objectives.
OD differs from traditional consulting because client involvement is encouraged throughout the entire process. The ways in which people communicate and work together are addressed concurrently with technical or procedural issues that need resolution". - Chicago OD Network web site

Organization Development (OD) is an effort to increase an organization's ability to improve itself as a humane and effective system. Elements of OD may include:
1. Finding ways to adapt to the changing context while maintaining and enhancing the organization's integrity and internal integration.
2. Establishing structures, processes and a climate that allow it to effectively manage its important and pressing business (e.g. projects, problems, crises, etc.) while giving adequate attention to strategic issues (e.g., long term development and renewal, planning and envisioning, engaging new opportunities, crisis prevention, etc.)
3. Increasing the ability to engage formation issues such as:

- vision including the defining of identity, purpose, values, organizational culture and related programs and activities.
- attracting new people (as staff and/or members) who support the vision
- increased competence and commitment
- creating an alignment, an adequate "fit" among the various aspects of the organization's life, e.g.
  -- various sub-systems (people, structure, strategy, processes, etc.)
  -- vision & resources of leadership, energy and funds
  -- income & expenses
  -- physical facilities & program needs and possibilities
- establishing relationships with external "public" or constituencies that have a stake in the organization.

4. Increasing its ability to adapt to new conditions, solve problems and learn from experience. A capacity for self-renewal.
OD does involve problem solving, but its most significant contribution to an organization is in creating an culture that focuses on the continuous growth and vitalization of the system. OD is a normal and vital part of a healthy organization. - Robert A. Gallagher, 1997

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From: What are the basic values of OD?

- by Allan H. Church & W. Warner Burke, 1993 They surveyed 1,000 OD practitioners regarding the values in the field, using names randomly selected from two professional associations (The OD Network and The American Society for Training and Development -- OD division). They achieved a response rate of about 29%.

The five most important values that currently drive work in the field of OD today:
1. Increasing effectiveness and efficiency
2. Creating openness in communication
3. Empowering employees to act

4. Enhancing productivity
5. Promoting organizational participation

The results of our survey confirmed empirically what many authors in the field have already suggested; that is, that there are only two primary value constructs underlying practitioners' work with organizations in the OD field. These are (1) fostering humanistic concerns--such as empowering managers and enhancing quality of worklife--and (2) focusing on the more traditional business needs and measures, including increased effectiveness, efficiency, and profitability.

The five most important values that should ideally drive OD work:
1. Empowering employees to act
2. Creating openness in communication
3. Facilitating ownership of process and outcome
4. Promoting a culture of collaboration
5. Promoting inquiry and continuous learning

When we asked respondents to rate these same values in the ideal, or what "should be" driving the field of OD, we found a substantially different pattern of results. Interestingly, this time all five of the highest rated values concerned the nature of human processes rather than the business outcomes…….This pattern of results would suggest that, ideally, OD practitioners would prefer to focus more on the humanistically oriented values if all other concerns were held in a vacuum; i.e., if the consultant were not concerned about losing the contract and the client emphasis was not always one of a "show me" or "produce results" mentality.

The five values that increased the most in relative importance between ratings:
1. Promoting inquiry and continuous learning
2. Protecting the natural environment
3. Fostering corporate citizenship in the community
4. Transferring OD skills and technologies to clients
5. Promoting a concern for human dignity

These five items, selected for their difference scores, represent the highest degree of change in importance between the "should be," ideal values ratings and the "current" ratings of the state of OD today. In comparing the two sets of ratings, we find items or values that are seen as increasingly important to practitioners, but not as predominant motivating factors for OD work at the present. In some ways, these values may be seen as emerging trends in the field.

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Success in OD Efforts

From "Organization Development Overview" Marge Yanker

What are some of the factors for OD success?

Keys to the success of OD are:
1. Systematic Processes to identify problems, generating solutions, and implementing those solutions.
2. Employee Participation.
3. Timeliness.

4. Top Management Involvement.
5. Organization must be ready for change.

What are common stumbling blocks faced in carrying out successful OD work ?

The strategies of OD to intervene in the ongoing activities of the organization and to facilitate the processes for improved effectiveness are often hampered by the following issues, among others:

- Trust within the organization (between individual, among groups, up and down the hierarchy, etc.)
- Methods of dealing with problems and/or conflict (open sweeping under the run, smoothing over, confrontation, etc.)
- Decision-Making processes (how and by whom, empowered employees, top down, etc.)
- "Ownership" of organizational goals (all, top only, one group, etc.)
- Communication Patterns (open, candid, feedback, etc.)
- Relationships (interdependent, independent, competitive, cooperative)
- Leadership/Followership (complementary, styles, etc.)

ROLES FROM WHICH OD EFFORTS CAN BE STARTED

In each role the person is using Organization Development knowledge and methods in a process of organizational improvement.

THE ROLE	*CHARACTERISTICS*	*BENEFITS*	*COSTS*
Manager The CEO, executive director, president or the manager of a department are all people with the primary responsibility to take action for system improvement. <u>OD Team</u> - an extension of the manager's authority; team shares responsibility for OD effort.	Has the legitimate authority for shaping processes, structures and climate; also for initiating and monitoring; visible, accountable.	Easier to make entry into the system. More focused on results. Has a defined place in the organization.	May be drawn away from OD effort by other demands. Becoming the target of the system's cynics and those resisting improvement effort.
Internal Consultant Has a defined position Within the organization that carries responsibility for consulting and training activities toward organizational improvement. Is not a manager with the authority to initiate OD efforts.	Visible. Is accountable to several sources (the internal client, the client's "boss"). Needs contracts with others in order to function.	Is part of the system. Can develop a highly integrated sense of how to do an OD effort in this particular organization. May be more secure (financial and psychological).	Less status than external consultants. Dependent on others for authority to function. Low influence. Political binds. May be under pressure to do projects or do them in a manner that violates own sense of good practice.

External Consultant Is not part of the organization's on-going life. Is contracted with to provide consulting and training services to facilitate improvement.	High visibility. Temporary in the system. Has a formal contract.	Independence in selecting work. Possible variety of clients. Clear contracts. May see things the insiders fail to see. May be able to productively use dependence.	Has to generate own clients. Lack of peers to work with in efforts -- lack of critique, loneliness. May be unfamiliar with the organization and the product or services it offers -- may lead to misunderstandings, lack of integration in approach. Not seeing the long term results.
Internal Change Agent Any member or employee in the organization that acts for improvement on their own authority. Has no organizational authorization for the effort.	Role is not formally defined or authorized. May call for low visibility. May be risky.	Acting on own values. Sense of purpose.	Risk of punishment - being ostracized, loss of job or membership.

SCOUTING WORKSHEET

A. DEFINING YOUR CONSULTING PRACTICE

AREA	CURRENTLY	FUTURE PLANS
1. Competence		
2. Commitment		
3. Lack of Competence for ….		
4. Low interest or willingness for ….		
5. Geographical Scope		

6. Type of Organizations		
7. Your top three strengths		
8. Your primary weaknesses		
9. Your three core values (related to consulting)		
10. The contribution you want to make		
11. The achievement you seek		

B. SHAPING YOUR CONSULTANT IMAGE

1. **The image you believe that clients (or potential clients) currently has of you. List elements.**

2. **Which are widely held? – Mark with a "W"**
   Which do you most like? – Mark with an "L"

3. **Notes on additional/revised image you would like to have.**

C. POSITIONING

1. Identify your competition

2. What do they do better than you?

3. What do you do better than them?

4. Why would a potential client be smart to use you instead of someone else?

5. What type of contract would you recommend another consultant for (in place of you)?

6. What is your approach to fees and expenses? How does it compare with other consultants?

D. COMMUNICATION

1. List three potential clients.

2. Identify existing or past clients who might be willing to give your name as a consultant to people they know. Plan to speak with them about leads.

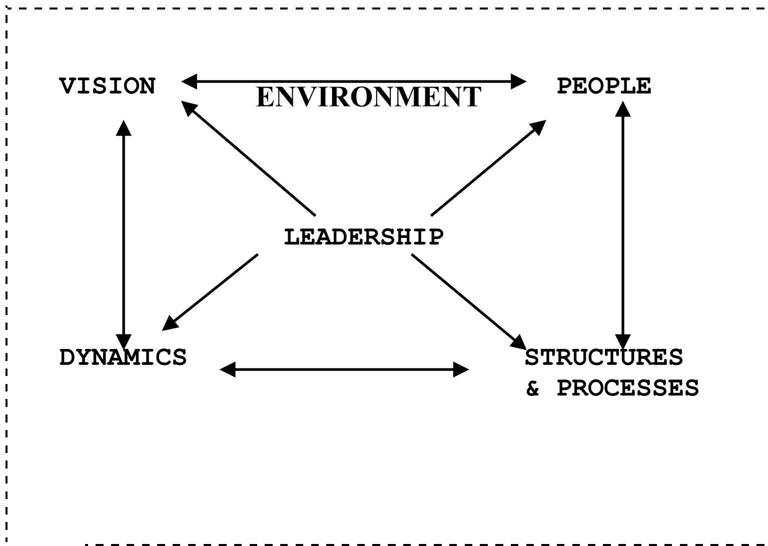
3. Do you have a list of services you provide?	**YES**	**NO**
♦ **Has it been updated in the past year?**	**YES**	**NO**
♦ **Has someone else given you feedback on it?**	**YES**	**NO**
♦ **Do you use it frequently?**	**YES**	**NO**

3. Do you have an article or a book "in your head" or "in your imaging"? What is it?

Organizational Diagnosis: Six Primary Elements of the System

A. VISION
1. The vision, goals, primary task, core values, etc.
2. How widely and deeply "owned"

B. PEOPLE
1. Competence and commitment for the job and teamwork
2. Type
3. Satisfaction with the job and the organization



C. DYNAMICS
1. Managing change & stability
2. Trust
3. Climate

D. STRUCTURES & PROCESSES
1. Adequate and appropriate resources for the task, e.g., technology, architecture, & space, etc.
2. Processes for effective information flow, problem solving, planning, conflict, etc.
3. Teams to carry out needed tasks
4. Effective linkages and cooperation between subsystems

E. LEADERSHIP
1. Ability to think and manage strategically
2. Ability to stay in touch with the system
3. Ability to set direction and enable movement

F. ENVIRONMENT
Forces and trends external to the organization that impact the organization, e.g., social, political, economic, etc.

G. "FIT" -- Identify areas where there is poor alignment, e.g., between core values and responsibility toward staff or the community.

ORGANIZATIONAL DIAGNOSIS WORKSHEET

Are you (circle one)
- On staff
- On the Board

Please rate the following items. Add comments if you want

	Very Low					Very High
A. Overall						
1. My overall satisfaction with the organization's functioning	1	2	3	4	5	6
2. My overall satisfaction with my own role in the organization	1	2	3	4	5	6
B. Primary Task						
1. Level of agreement **among staff** members about the primary task of the organization	1	2	3	4	5	6
2. Level of agreement **among board members** about the primary task of the organization	1	2	3	4	5	6
3. Level of agreement **between the board and the staff** about the primary task of the organization	1	2	3	4	5	6
4. Productivity in our primary task	1	2	3	4	5	6
5. Quality of service	1	2	3	4	5	6
6. Innovation - practice of encouraging people to find better ways to serve “clients” and do their jobs	1	2	3	4	5	6
C. Vision						
1. Sense of direction (expressed in vision, strategic plan, or just in practice) for the organization	1	2	3	4	5	6
2. Clarity of core values	1	2	3	4	5	6
3. "Ownership" of direction among staff	1	2	3	4	5	6
4. "Ownership" of direction among board members	1	2	3	4	5	6
D. Dynamics						
1. Level of trust among board members	1	2	3	4	5	6
2. Level of trust between CEO/Director and the staff	1	2	3	4	5	6
	Very					**Very**

	Low					High
3. Level of trust among **staff** members	1	2	3	4	5	6
4. Level of **trust between board and the CEO/Director**	1	2	3	4	5	6
5. How well the organization manages the dynamics of change and stability (e.g., changing when we need to change, maintaining institutional integrity and integration as we change, skill at removing or reducing the forces against needed change, skill at maintaining adequate stability so productivity is maintained, etc.)	1	2	3	4	5	6

E. People

1. Competence of **staff** for their work	1	2	3	4	5	6
2. Commitment of **staff** to their work	1	2	3	4	5	6
3. Competence of the **board** for its work	1	2	3	4	5	6
4. Commitment of the **board** for its work	1	2	3	4	5	6
5. How effectively the **staff** makes use of different working styles among its members	1	2	3	4	5	6
5. How effectively the **board** makes use of different working styles among its members	1	2	3	4	5	6

F. Structures and Processes

1. How adequate and appropriate are the resources the **staff** has for its work (e.g., technology, space, etc.)	1	2	3	4	5	6
2. How adequate and appropriate are the resources the **board** has for its work	1	2	3	4	5	6
3. Effective participation in information flow, problem solving and decision making on the part of the **staff**	1	2	3	4	5	6
4. Effective participation in information flow, problem solving and decision making on the part of the **board**	1	2	3	4	5	6
5. How well the **staff** deals with differences, disagreements, conflict	1	2	3	4	5	6
6. How well the **board** deals with differences, disagreements, conflict	1	2	3	4	5	6
7. The **staff** usually has the accurate and timely information needed for decision making	1	2	3	4	5	6
	Very Low					Very High

8. The **board** usually has the accurate and timely information needed for decision making	1	2	3	4	5	6
9. The **staff** usually makes decisions from a sense of free choice rather than habit or pressure	1	2	3	4	5	6
10. The **board** usually makes decisions from a sense of free choice rather than habit or pressure	1	2	3	4	5	6
11. The **staff** has a strong sense of internal commitment to its decisions	1	2	3	4	5	6
12. The **board** has a strong sense of internal commitment to its decisions	1	2	3	4	5	6
13. Adequate links and cooperation among **staff** members	1	2	3	4	5	6
14. Adequate links and cooperation among **board** members	1	2	3	4	5	6
15. Adequate links and cooperation **between CEO/Director and staff**	1	2	3	4	5	6
16. Adequate links **between staff and the board**	1	2	3	4	5	6

G. Leadership

1. The **staff** is able to get the routine work done while also paying attention to strategic issues (e.g., long term or systemic issues, capacity building)	1	2	3	4	5	6
2. The **board** is able to get the routine work done while also paying attention to strategic issues (e.g., long term or systemic issues, capacity building)	1	2	3	4	5	6
3. As a **staff** we are in adequate touch with what is happening in the whole system	1	2	3	4	5	6
4. As a **board** we are in adequate touch with what is happening in the whole system	1	2	3	4	5	6
5. As a **staff** we are able to effectively participate in setting the strategic direction for organization	1	2	3	4	5	6
6. As a **board** we are able to effectively participate in setting the strategic direction for organization	1	2	3	4	5	6

LIKES-CONCERNS-WISHES: ASSESSMENT WORKSHEET

1. What is your overall satisfaction with the life and work of the organization?

VERY LOW SATISFACTION **VERY HIGH SATISFACTION**

1	2	3	4	5	6

2. Offer your thoughts about the organization's functioning using the categories below.

LIKES What you like/affirm about the organization's work and life.	**CONCERNS** Your concerns about the organization's life and work.	**WISHES** Your wishes about what the organization might do to improve its work and life.

3. Circle the items, in each category, that you see as most important to the long term health of the organization.
4. Put a check mark next to the items that could be most easily addressed.

THE INTERNATIONAL ORGANIZATION DEVELOPMENT CODE OF ETHICS

(December, 1991, 22nd Revision)

Our purpose in developing an International O.D. Code of Ethics are threefold: to increase professional and ethical consciousness among O.D. professionals and their sense of ethical responsibility; to guide O.D. professionals in making more informed ethical choices; and to help the O.D. profession itself function at the fullness of its potential.

We recognize that for us to exist as a profession, a substantial consensus is necessary among the members of our profession about what we profess, particularly our values and ethics. This statement represents a step toward such a consensus.

Values of O.D. Professionals

As an O.D. professional, I acknowledge the fundamental importance of the following values both for myself and my profession:

1. quality of life -- people being satisfied with their whole life experience;
2. health, human potential, empowerment, growth and excellence -- people being healthy, aware of the fullness of their potential, recognizing their power to bring that potential into being, growing into it, living it, and, generally, doing the best they can with it, individually and collectively;
3. freedom and responsibility -- people being free and responsible in choosing how they will live their lives;
4. justice -- people living lives whose results are fair and right for everyone;
5. dignity, integrity, worth and fundamental rights of individuals, organizations, communities, societies, and other human systems;
6. all-win attitudes and cooperation -- people caring about one another and about working together to achieve results that work for everyone, individually and collectively;
7. authenticity and openness in relationship;
8. effectiveness, efficiency and alignment -- people achieving the maximum of desired results, at minimum cost, in ways that coordinate their individual energies and purposes with those of the system-as-a-whole, the subsystems of which they are parts, and the larger system of which their system is a part;
9. holistic, systemic view and stakeholder orientation -- understanding human behavior from the perspective of whole system(s) that influence and are influenced by that behavior; recognizing the interests that different people have in the system's results and valuing those interests fairly and justly;
10. wide participation in system affairs, confrontation of issues leading to effective problem solving, and democratic decision making.

Ethical Guidelines for O.D. Professionals

As an O.D. professional, I commit myself to supporting and acting in accordance with the following ethical guidelines:

I. Responsibility to Self

A. Act with integrity; be authentic and true to myself
B. Strive continually for self-knowledge and personal growth
C. Recognize my personal needs and desires and, when they conflict with other responsibilities, seek all-win resolutions of those conflicts.
D. Assert my own economic and financial interests in ways that are fair and equitable to me as well as to my clients and their stakeholders.

II. Responsibility for Professional Development and Competence

A. Accept responsibility for the consequences of my acts and make reasonable efforts to ensure that my services are properly used; terminate my services if they are not properly used and do what I can to see that any abuses are corrected.
B. Strive to achieve and maintain a professional level of competence for both myself and my profession by developing the full range of my own competence and by establishing collegial

and cooperative relations with other O.D. professionals.

C. Recognize my own personal needs and desires and deal with them responsibly in the performance of my professional roles.

D. Practice within the limits of my competence, culture, and experience in providing services and using techniques.

E. Practice in cultures different from my own only with consultation from people native to or knowledgeable about those specific cultures.

III. Responsibility to Clients and Significant Others

A. Serve the long-term well-being, interests and development of the client system and all its stakeholders, even when the work being done has a short-term focus.

B. Conduct any professional activity, program or relationship in ways that are honest, responsible, and appropriately open.

C. Establish mutual agreement on a contract covering services and remuneration.

D. Deal with conflicts constructively and avoid conflicts of interest as much as possible.

E. Define and protect the confidentiality of my client-professional relationships.

F. Make public statements of all kinds accurately, including promotion and advertising, and give service as advertised.

IV. Responsibility to the Profession

A. Contribute to continuing professional development for myself, other practitioners, and the profession.

B. Promote the sharing of O.D. knowledge and skill.

C. Work with other O.D. professionals in ways that exemplary what our profession says we stand for.

D. Work actively for ethical practice by individuals and organizations engaged in O.D. activities and, in case of questionable practice, use appropriate channels for dealing with it.

E. Act in ways that bring credit to the O.D. profession and with due regard for colleagues in other professions.

V. Social Responsibility

A. Act with sensitivity to the fact that my recommendations and actions may alter the lives and well-being of people within my client systems and the larger systems of which they are subsystems.

B. Act with awareness of the cultural filters which affect my view of the world, respect cultures different from my own, and be sensitive to cross-cultural and multicultural differences and their implications.

C. Promote justice and serve the well-being of all life on Earth.

D. Recognize that accepting this Statement as a guide for my behavior involves holding myself to a standard that may be more exacting than the laws of any countries in which I practice, the guidelines of any professional associations to which I belong, or the expectations of any of my clients.

NOTES

The process which has produced this statement (currently in its 22nd version) was being in 1981. It has been supported by most O.D.-oriented professional organizations, associations, and networks in the United States. It was also supported unanimously by that participants at the 1984 O.D. World Congress in Southampton, England. To date, more than 200 people from more than 15 countries have participated in the process (Note: The endorsements are of the process and not the statement.) The process has included drafting a version, sending it out with a request for comments and suggestions, redrafting based on the responses, sending it out again and so on. Our aim has been to use the process to establish a substantial consensus including acknowledgment of the differences among us.

By providing a common reference for O.D. professionals throughout the world, we seek to enhance our sense of identity as a global professional community. Because this statement was initially developed within the United States, adapting it to other cultures has been necessary.

Editor's Note: A more complete discussion of Organization Development values and ethics can be found in:

- Gellermann, William, Frankel, Mark S. and Landenson, Robert F., *Values and Ethics in Organization and Human Systems Development*, Jossey-Bass, 1990.
- Frankel, Mark S., *Values and Ethics in Organization and Human Systems Development: An Annotated Bibliography*, AAAS Publication, October, 1987
- White, Louis P. and Wooten, Kevin C., *Professional Ethics and Practice in Organization Development*, New York, Praeger Publishers, 1986..
- And on the World Wide Web at http://www.odnetwork.org/credo.html.

Organization Development Competencies

as of March, 2001

Prepared for the OD Network by Roland Sullivan, Bill Rothwell, and Chris Worley

MARKETING

An effective organization development (OD) practitioner can . . .

1. Be aware of systems wanting to change

2. Be known to those needing you
3. Match skills with potential client profile
4. Convey qualifications in a credible manner
5. Quickly grasp the nature of the system
6. Determine appropriate decision makers
7. Determine appropriate processes

ENROLLING

An effective organization development (OD) practitioner can . . .

8. Build trusting relationships
9. Present the theoretical foundations of change
10. Deal effectively with resistance
11. Help the client trust the process
12. Help the client manage emotionally charged feelings
13. Collaboratively design the change process

CONTRACTING

An effective organization development (OD) practitioner can . . .

14. Contract psychologically for collaboration
15. Help the client reflect on motivation
16. Clarify outcomes
17. Build realistic expectations
18. Conduct a mini-assessment
19. Identify the boundary of systems to be changed
20. Articulate an initial change process to use
21. Explicate ethical boundaries
22. Confirm commitment of resources
23. Identify critical success factors for the intervention
24. Clarify the role of consultant
25. Clarify the role of client
26. Begin to lay out an evaluation model

MINI-ASSESSMENT

An effective organization development (OD) practitioner can . . .

27. Further clarify real issues

28. Be aware of how one's biases influence interaction
29. Link change effort into ongoing organizational processes
30. Identify formal power
31. Identify informal power

DATA GATHERING

An effective organization development (OD) practitioner can . . .

32. Determine an appropriate data collection process
33. Determine the type of data needed
34. Determine the amount of data needed
35. Utilize appropriate mix of methods to ensure efficiency
36. Utilize appropriate mix of methods to ensure objectivity
37. Utilize appropriate mix of methods to ensure validity
38. Utilize appropriate mix of data collection technology
39. Clarify boundaries for confidentiality
40. Select a process that will facilitate openness
41. Gather data to identify future states

DIAGNOSIS

An effective organization development (OD) practitioner can . . .

42. Gather data to identify initial first steps of transition
43. Watch for deeper issues as data is gathered
44. Suspend judgment while gather data
45. Know when enough data has been gathered
46. Suppress judgment while gathering data
47. Use statistical methods when appropriate
48. Recognize what is relevant
49. Know how data from different parts of the system impact each other
50. Communicate implications of systems theory
51. Continuously assess the issues as they surface
52. Stay focused on the purpose of the consultancy
53. Utilize a solid conceptual framework based on research

FEEDBACK

An effective organization development (OD) practitioner can . . .

54. Prepare leadership for the truth
55. Involve participants so they begin to own the process
56. Synthesize the data gathered into themes
57. Create a non-threatening atmosphere
58. Facilitate complex emotional patterns

PLANNING

An effective organization development (OD) practitioner can . . .

59. Distill recommendations from the data
60. Focus action that generates high impact at lowest cost
61. Consider creative alternatives
62. Mentally rehearse adverse consequences
63. Mentally rehearse potential gains

PARTICIPATION

An effective organization development (OD) practitioner can . . .

64. Facilitate a participative decision-making process
65. Obtain direction from leadership
66. Obtain commitment from leadership
67. Co-create an implementation plan that is rooted in the data
68. Co-create an implementation plan that is concrete
69. Co-create implementation plan that is simple
70. Co-create implementation plan that is clear
71. Co-create implementation plan that logically sequences activities
72. Co-create implementation plan that is results-oriented
73. Co-create implementation plan that is measurable
74. Co-create implementation plan that is rewarded

INTERVENTION

An effective organization development (OD) practitioner can . . .

75. Reduce dependency upon consultant
76. Instill responsibility for follow through

77. Intervene at the right depth
78. Pay attention to the timing of activities
79. Facilitate concurrent interventions
80. Help manage impact to related systems
81. Re-design intervention or mindfully respond to new dynamics

EVALUATION

An effective organization development (OD) practitioner can . . .

82. Integrate research with theory and practice
83. Initiate ongoing feedback in client-consultant relationship
84. Choose appropriate evaluation methods - - that is, interviews, instruments, financial sheets - - to collect evaluation information
85. Determine level of evaluation - - such as reaction, learning, behavioral change, organizational impact, societal impact
86. Ensure evaluation method is valid
87. Ensure evaluation is reliable
88. Ensure evaluation method is practical

FOLLOW-UP:

An effective organization development (OD) practitioner can . . .

89. Establish method to monitor change during the intervention
90. Establish method to monitor change after the intervention
91. Use information to reinforce positive change
92. Use information to correct negative change
93. Use information to take next steps
94. Link evaluation with expected outcomes

ADOPTION

An effective organization development (OD) practitioner can . . .

95. Transfer change skills to internal consultant so learning is continuous
96. Maintain/increase change momentum
97. Link change process to daily life of system
98. Mobilize additional internal resources to support continued change
99. Determine the parts of the organization that warrant a special focus of attention
100. Pay attention to movement back to old behaviors

101. Move more away from project-driven change to strategy-driven change
102. Be sure customers and stakeholders are satisfied with intervention's results
103. Plan renewal/reunion events

SEPARATION

An effective organization development (OD) practitioner can . . .

104. Recognize when separation is desirable
105. Process any left over relationship issues between consultant(s) and client
106. Ensure that learning will continue
107. Leave the client satisfied
108. Plan for post-consultation contact

SELF-AWARENESS

An effective organization development (OD) practitioner can . . .

109. Clarify personal values
110. Clarify personal boundaries
111. Manage personal biases
112. Manage personal defensiveness
113. Recognize when personal feelings have been aroused
114. Remain physically healthy while under stress
115. Resolve ethical issues with integrity
116. Avoid getting personal needs met at the expense of the client (i.e., financial, emotional, sexual, etc.)
117. Work within the limits of your capabilities
118. Perform effectively in an atmosphere of ambiguity
119. Perform effectively in the midst of chaos

INTERPERSONAL

An effective organization development (OD) practitioner can . . .

120. Develop mutually trusting relationships with others
121. Solicit feedback from others about your impact on them
122. Energize others
123. Collaborate with internal/external OD professional
124. Balance the needs of multiple relationships
125. Listens to others

126. Pay attention to the spontaneous and informal
127. Consistently maintain confidentiality
128. Interpersonally relate to others
129. Use humor effectively

OTHER

An effective organization development (OD) practitioner can . . .

130. Interpret cross-cultural influences in a helpful manner
131. Handle diversity and diverse situations skillfully
132. Communicate directions clearly to large groups
133. Use the latest technology effectively
134. Use the internet effectively
135. Facilitate small group interventions (up to 70)
136. Facilitate large group interventions (70-2,000)
137. Apply the skills of international OD effectively
138. Function effectively as an internal consultant
139. Demonstrate ability to conduct transorganizational development
140. Demonstrate ability to conduct community development
141. Be aware of the influences of cultural dynamics on interactions with others

An Intervention Theory

The following is largely based on the work of Chris Argyris in *Intervention Theory and Method*. It can be seen as the underlying "process outcomes" the consultant is seeking in an intervention, i.e., valid and useful information, free choice, and internal commitment.

Valid and Useful Information

- Information that can be publicly verified; that can be tested with a broad range of people; that can be openly gathered and discussed.
- Is useful in the sense that something can be done with it to effect change

↓

Free Choice

- The task is for the client to select the option with the highest probability of succeeding (within cost limits).
- The process needs to enable that choice to be:
  - based on an exploration of options
  - voluntary, not from habit or coercion
  - proactive, not reactive

↓

Internal Commitment

- The target is for as many people as possible to have a high level of commitment to the option that was chosen.
- A high ownership and feeling of responsibility. That people are acting under the influence of internal decision rater than external forces.
- More likely to hold over time and under stress
- Open to re-examination (our commitment to "valid and useful information" may bring new information and new choices)

The theory assumes that one element builds on the other. The more the information is valid and useful, the more likely the free choice, the more there is truly free choice, the more likely there will be internal commitment.

The theory also assumes that the consultant is not just trying to help the client solve a particular problem or engage a specific opportunity; but is also concerned with two other matters:

- that people end up with high internal commitment to the direction, and
- that the organizational culture is enabled to increasingly value and have the ability to generate valid and useful information, encourage free choice, and seek internal commitment.

There is a tension in an intervention between addressing the opportunity or problem at hand and pursuing the values in this intervention theory. Organizational leaders may decide to give more attention to one need over the other because of time limits, financial costs or due to holding different values.

CORE COMMUNICATION & FEEDBACK SKILLS

Communication Skills

Paraphrase - saying back to the speaker what you heard them say. The goal is to accurately grasp the content of their idea. You may either repeat exactly what was said or you may summarize, restate the essence of what the speaker said.

- A useful method is to begin your response with ***"I hear you saying ..."***

Itemized Response - this involves giving a full response to a person's idea by telling them what you like/appreciate/can use in their idea and what concerns you about the idea. The assumption here is that it helps the group's work when we enable participation and seek what may be of value in each idea. Itemized Response helps: keep unformed but possibly useful ideas alive, establish a supportive group climate, and helps us see the fullness of an idea.

- A useful method is to frame your responses using the following:
  "What I like about it is ...." ***"What concerns me is ..."***

Active Listening - trying to state the feelings and underlying message that the speaker is communicating. Stating this as something you are "testing" rather than as a "truth". Allowing yourself to be corrected as the person restates their message.

Making Statements Rather than Asking Questions or Sharing Opinions - this is to enable the group to stay with the issue being worked on. Frequently questions are really hidden statements, e.g., "don't you think it would be better if ...". Opinion sharing may better fit after work with beer or coffee.

The use of core communication skills:

- Tends to help focus the group's discussion. It reduces repetition and explaining "what I really meant to say ..."
- Important in de-escalating conflict; also in preventing misunderstandings. It provides everyone with a way to build agreements, clarify misunderstandings, negotiate.
- Helps the group build on each other's ideas. Builds trust and strengthens relationships.
- Requires "group discipline" - using the skill even when it feels awkward; giving energy to it; putting aside your own judgements for the moment; being congruent in the body language and tone of voice.
- You are working to respect others and yourself in a manner that is responsive and assertive rather than evasive, passive or aggressive. The skills assume that you are ready to give positive attention to the other person rather than only appearing to be engaged and listening.

Feedback Skills

Feedback may have several purposes – it may be information that expands a person's information about themselves and the effect they have on others; it may expand the person's range of choices; and it may be intended to support or discourage certain behavior.

Feedback is likely to be more effective if:

- The person receiving it acknowledges the need for it; especially if the person requests it
- It is timely; given near the time the behavior has occurred
- It is skillful

Skillful Feedback

- Be descriptive, provide information that describes the behavior and its impact on you; restrict the feedback to what you know (e.g., behavior you have seen and how it has impacted you).
- It is about the giver of the feedback, not the person receiving the feedback. It is an exploration of the effect the person's behavior has had on you. (note – the same behavior may not have that effect on others).
- Avoid exaggeration ("you always get this wrong"), labeling ("you are stupid"), and judgement
- Speak for yourself ("what I feel/experience when you ….") not for others ("Everyone gets upset when you ….")
- Don't press the person for any immediate response
- Face to face – not by e-mail

Skillfully Receiving Feedback

- Listen – if something helps you to listen do that, e.g., take notes, ask someone else to make notes on the feedback so you can focus on the speaker
- Ask questions to clarify – "could you give an example of that?", "when did that happen?", "who else was there?
- If others where present during the behavior the feedback is about; ask them to offer feedback, what was the effect on them
- Acknowledge valid points
- Open yourself. Do not get defensive (you may feel it, don't act it). Stay focused on hearing what is being said.
- Take time to think about what has been said; if a response is necessary tell those offering the feedback that you will think about it and offer some response on a specific date.

A formula for giving feedback

1. "When you ……"	Note the behavior; describe it as specifically as possible.
2. "I felt …."	Tell how the behavior affects you. This is just one or two words – frustrated, angry, pleased, etc.
3. "Because I …"	Share why you are affected that way.

From Feedback to Negotiation of the Relationship

4. "I would like …"	What would you like the person to consider doing.
5. "Because …"	Why you believe it will help
6. "What do you think?"	Invite and hear the response; explore options

Feelings

Sad

High		*Medium*		*Low*
Bleak	Grim	Dejected	Moved	Ashamed
Blue	Helpless	Discouraged	Shame	Bored
Crestfallen	Hopeless	Dismal	Solemn	Cheerless
Depressed	Melancholy	Dispirited	Sullen	Disappointed
Devastated	Mournful	Down	Unhappy	Embarrassed
Disconsolate	Sorrowful	Downcast		Hurt
Empty	Woebegone	Heavy		Pained
Grieving	Woeful	Lonely		Somber
		Morose		Uninterested

Afraid

High		*Medium*		*Low*
Alarmed	Agitated	Startled	Concerned	Timid
Distressed	Anxious	Tense	Coy	Timorous
Fearful	Apprehensive	Troubled	Diffident	Uneasy
Frightened	Fainthearted	Uptight	Doubtful	Unsettled
Ghastly	Insecure	Worried	Dubious	Unsure
Panic-stricken	Jittery		Edgy	Vulnerable
Petrified	Nervous		Fidgety	
Scared	Perturbed		Restless	
Shocked	Pessimistic			
Terrified	Shaky			

Mad

High		*Medium*	*Low*
Angry	Aggravated	Animosity	Sore
Boiling	Exasperated	Enmity	"Teed off"
Enraged	Frustrated	Ireful	Uneasy
Fuming	Incensed	Irked	Unhappy
Furious	Indignant	Miffed	Unsettled
Hateful	Inflamed	Peeved	Vexed
Hostile	Vengeful		
Infuriated	Worked-up		

Glad

High		*Medium*	*Low*
Alive	Comfortable	Peaceful	Blithe
Cheerful	Content	Pleased	Blithesome
Delighted	Enchanted	Rapturous	Tranquil
Ecstatic	Exalted	Serene	
Elated	Exquisite	Spirited	
Energetic	Gay	Vibrant	
Excited	Gleeful	Warm	
Exuberant	Hilarious	Zestful	
Happy	Jolly		
Jubilant	Jovial		
	Lighthearted		

Consultation Skills Training Reading List

1. Argyris, Chris, *Intervention Theory and Method: A Behavioral Science View*, Addison-Wesley Publ. Co., Reading, MA, 1970, 369 pages.

   The book deals primarily with the early phases of intervention relationships: identifies the primary tasks, explores criteria for assessing a social system, looks at ways to increase the effectiveness of an intervention and the conditions that tend to lead to ineffective interventions, and reviews the steps in an intervention. Argyris was the Beach Professor of Administrative Sciences at Yale when this was written.

2. Belmar, Geoffrey, *The Consultant's Calling: Bringing Who You are to What You Do*, Jossey-Bass Publishers, San Francisco, 1990, 232 pages.

   Bellman begins by exploring his assumption that who you are and how you balance your work in your life is related to both the consultant's effectiveness and sense of joy. He goes on to investigate the consultant role, how organizations work, how to develop a partnership with clients that brings expertise, perspective, authenticity, friendship, accomplishment and trust (while acknowledging the temptations of manipulation, pretense, abuse of power, etc.). Bellman has served as an internal or external consultant to various sized organizations for over thirty years.

3. Block, Peter, *Flawless Consulting*, University Associates, San Diego, 1981, 215 pages.

   Block focuses his work on two processes: □ Being as authentic as you can be at all times with the client □ Attending directly, in words and actions, to the business of each stage of the consulting process. The book provides guidance for the practice of consulting. Block is a consultant with industry, government and volunteer organizations.

4. Block, Peter, <u>The Flawless Consulting Fieldbook & Companion</u>, Jossey-Bass/Pfeiffer, San Fancisco, 2001,442 pages

   Block focuses his work on two processes: □ Being as authentic as you can be at all times with the client □ Attending directly, in words and actions, to the business of each stage of the consulting process. The book provides guidance for the practice of consulting. Block is a consultant with industry, government and volunteer organizations.

5. Schein, Edgar, *Process Consultation: Vol 1 Its Role in Organization Development*, Addison-Wesley, Reading, MA, 1969, 204 pages.

   The book provides an approach for diagnosis and interventions rooted in the field of social-organizational psychology. Schein is a professor of management at the Sloan School of Management, Massachusetts Institute of Technology.

6. Schein, Edgar, *Process Consultation: Vol 2 Lessons for Managers and Consultants* , Addison-Wesley, Reading, MA, 1987, 208 pages.

   Builds on Vol 1 with modifications, new applications, etc.

7. Schein, Edgar, *Process Consultation Revisited: Building the Helping Relationship*, Addison-Wesley, Reading, MA, 1999, 256 pages.

   The book provides an approach for diagnosis and interventions rooted in the field of social-organizational psychology.

8. Nelson, Bob and Economy, Peter, *Consulting for Dummies*, IDG Books, Foster City, CA, 1997.
9. A broad overview of consulting.

10. Byrne, John, "The Craze for Consultants," *Business Week*, July 25, 1994.

    A business view on the use of consultants.

11. Reedy, Brendan, *Process Consultation for Small Groups and Teams*, Pfeiffer, San Diego, 1994.

    Looks at issues of the consultant style, role and competencies; type and depth of interventions.

About LTI – Leadership Training Institute

Description of LTI Workshops

Human Interaction - An opportunity to learn about yourself, how your behavior impacts others, and how to function more effectively in a group and interpersonal situations. The competencies developed are those associated with what has been called emotional intelligence. A key element of the program is the use of the T-Group method which facilitates learning by bringing together a small group of people for the express purpose of studying their own behavior when they interact within a small group. The T-group method provides little structure or direction from the trainers. The lack of a given structure allows participants to learn about their own patterns of behavior when there is a need for them to accept responsibility for a group's life and work. The training staff works to help participants learn from their own experience. The Human Interaction Workshop is the required prerequisite training for most other LTI events. This is a beginning point for learning core skills that are used and build on in other events.

Group Development - This workshop focuses on understanding and effectively sharing leadership in groups and teams. Attention is given to developing an awareness of group development and dynamics, balancing task and relationship issues, establishing group norms. Group facilitation skills training is part of the event. Prerequisite Training Required: Human Interaction with LTI or another approved group

Design Skills - Develop skills that can improve the quality of meetings, education, and programs; that increase "ownership", energy and excitement. Increase your ability to design more experiential and participatory events. Prerequisite Training Required: Human Interaction with LTI or another approved group.

Consultation Skills - For those in consulting or other third party roles This event focuses on skills for third party intervention, e.g., steps in the consulting process; consulting style, ethics, needs, dilemmas, dynamics; the ability to form authentic helping relationships; becoming more comfortable with the use of "self" in consulting. Prerequisite - Participants must have completed Human Interaction and either Group Development or Design Skills with LTI or another agency; or have completed a human interaction workshop and CDI - Church Development Institute

Conflict Management - This workshop will offer special attention to the "use of self" in a conflict. The goal is to increase your awareness of what is happening to you in a conflict, help you to identify your blindspots, and to increase the range of options you have for effective behavior. We will begin with a couple of days of T-group work. There will also be opportunities for self-assessment and feedback from other participants and trainers. In addition to the emphases on the "use of self" you will learn conflict management skills, methods and theory for use in groups and organizations. This workshop meets the perquisite requirements for other workshops. It is somewhat longer than other workshops.

Church Development – If you are interested in training that focuses on the use of organization development methods and knowledge in church organizations you may want to look at the Church Development Institute. For information go to www.CDITrainers.org

Arrange for workshops in your region

LTI will come to your region and offer a series of workshops in collaboration with a diocese, group of parishes, or other organization.

Your organization will be asked to recruit enough participants to make it possible to conduct the workshops. LTI will also invite people from other regions to participate. You will be asked to do the initial logistical work of arranging for a training location and providing a contact person to work in partnership with the LTI workshop coordinator. You may also be asked to provide an underwriting grant to LTI. The size of the grant depends on your success in the recruiting effort. It usually runs in the range of $1,500 - 4,000

LTI will provide the training staff, materials and manage all the follow up work with the training location.

The interactive of the training experience makes it essential that participants arrive as scheduled, and participate in all scheduled sessions throughout the week; no late arrivals or early departures.

LTI is a Network of Trainers

We are a network of experience lab trainers who have served the church and other organizations. Senior LTI trainers are: Susan Adam, Bob Gallagher, Rebecca DeBow, Bill Thomas, Kay Collier-McLaughlin, and Bill Yon. Co-trainers are Liz Tunney, Paul Rider, and Ceci Duke.

Interns: Glenda Curry, Susan Latimer, Stephanie Gadzik, Susan Burns, Peggy Worzalla, Alissa Newton, Michelle Heyne, Lou Blanchard, Krista Points, Ann Fleming, Patty Downing, Jan Merkt, Anita Sanborn, Steve Carlson, Beth Bordeaux, Dickie Downing.

We are committed to providing the best possible training for the church and other organizations. We are also engaged in a process of establishing a larger training network that will be able to offer more training at locations in various parts of the country.

Episcopal Church Related – LTI has been supported by a number of dioceses and church related organizations. Most staff are lay or ordained Episcopalians.

The Leadership Training Institute offers programs that enable leaders to function more effectively in their work with parishes and other organizations; to improve their competence for working with others, facilitating teams, and designing meetings, educational events and programs. We have a special vocation to serve the Episcopal Church while also serving non-profit organizations and values based businesses.

All of LTI's programs use the laboratory method of learning. This form of training has a goal of increasing your options for effective behavior in interpersonal, group, and organizational settings. Lab Learning involves disciplined reflection on the immediate here-and-now experiences within the learning community. We make use of applied behavioral science theory to explore the patterns and dynamics present in a group or organization. This has proven itself as one of the most effective ways to learn skills involving work with people an change processes. In addition to learning in the focus of a particular lab (e.g., group development, consultation skills, etc.) all events offer the opportunity to:

- Increase your understanding of the impact of your behavior on others.
- Increase your ability to give and receive feedback.
- Increase your understanding of group development and dynamics.
- Better understand the underlying social processes at work within a group
- Experiment with changes in your behavior
- Better integrate your feelings, thinking and values
- Increase your ability to learn from your own and a group's experience.

Participants will be involved at every stage in activities which will are designed to increase self awareness, expand your awareness of choices you have in the immediate situation, and at times challenge your filters and biases.. These activities involve a certain amount of stress**. It is not, therefore, advisable for persons to participate who are living in the midst of unusual stress in their personal or professional lives.**

The interactive character of the training experience makes it essential that participants arrive by Sunday evening, and participate in all scheduled sessions throughout the week. In is generally advisable that you be in residence during the program.

Worship - All LTI workshops provide the opportunity to participate in worship in the Episcopal Church's tradition. All are welcome, no participant is expected to participate as part of the program. Worship usually includes daily Morning Prayer, Evening Prayer or Compline. We often celebrate the Holy Eucharist toward the end of the workshop.

Values & Faith Reflection Opportunities - Workshops often provide some opportunity to reflect on the relationship between what you are learning and your theological, philosophical or value tradition. This is part of the program. This also provides an opportunity to make use of skills learned in the workshop in a conversation that includes people from various traditions. The setting may allow practice in communication among people of different faiths and backgrounds as well as people who have no religious affiliation or interest. LTI staff will support an atmosphere of ecumenical openness, tolerance and respect for difference

Why Leadership Training?

Insights and skills developed in the workshops are used by people in the normal activities of parish and diocesan life:

- working with Vestries and other groups
- planning and goal-setting
- integration of new members
- education for children, youth, and adults
- community-building in the parish

In addition, lab training has been the foundation upon which a variety of special skills have developed on which the church has come increasingly to rely. Those involved in Church leadership during this period will be familiar with many of these areas:

- consultation for congregational development and during a parish search
- facilitation of Vestry retreats

- stewardship education and training
- conflict management
- mutual ministry review
- organization development

Each of these special applications depends upon basic understandings and skills in human relations and in the dynamics of communication between persons and within groups and parishes. Participation in LTI workshops can provide a valuable foundation for those who are called on for such special responsibilities.

Why a Mixed Participant Population?
There are several reasons why the training is open and not just for members of the Episcopal Church.
1. It offers the opportunity for everyone to use skills in interpersonal and team work in a more realistic context. This skills are not just used in church settings. This is especially important for participants who are lay members of parishes.
2. It is a way of serving the broader society.
3. It makes it easier for Episcopal laity to have their secular employers cover the costs of their participation
4. It allows us to draw on a larger population base and which makes it easier to cover costs.

Commitment - Competency - Emotional Maturity