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CALL FOR PAPERS: A NEW TIME
by Ronald E. Purser

The 2000 national Academy of Management meeting will be held August 4-9 in Toronto, Canada, with Professional Development Workshops (pre-conference activities), convening Friday 1:00 pm to noon on Sunday the 6th. The special theme for this year's new millennium meeting is indeed a timely one, appropriately titled, *"A New Time."* This theme invites all of us to contemplate, question, theorize and imagine how time is central to what we do as a division. Clearly, without time, there is no change and development. Yet time in modernity has remained a relatively hidden dimension—an abstract index, a convenient marker for dividing the days, hours and minutes of our lives. Does time have more to offer us? Are there other ways of knowing and experiencing time that could enhance our thinking about organizational change and development? We now have the opportunity to start a new dialogue with time, exploring creatively its dynamism, power and mystery--bringing to bear our interdisciplinary viewpoints that can shed light on its appearance in organizations and our lives. This call is to invite you to join in this inquiry with us in Toronto!

More on the Theme

The orientation of the ODC division is well aligned with this year's special theme. Lewin's basic notion of facilitating change—unfreezing, moving, and refreezing—is suggestive of a temporal dimension. However, rather than taking time for granted in organizational change and development theories and practices, we now are invited to put the phenomena of time in the foreground of our thinking. We hear a lot about the importance of time these days in the popular business press. Managers are exhorted to push for "faster cycle times," to take advantage of e-commerce so organizations can operate with a "real-time" advantage, and simply the outworn truism that we now live in turbulent times—that change is a constant. But what about "A New Time?"Just what is our understanding and relationship to time? The conference theme offers us the opportunity to explore time on a deeper level, rather than succumbing to popular temporal exhortations.

Clearly, we are all witnessing and experiencing an intense period of what David Harvey has called "time-space compression" in society. Globalization, the rapid spread and convergence of media, computing and telecommunication technologies, are just some of the factors that are accelerating the pace of modern life. There is a great deal of anxiety about time among people, both on a professional and personal level. We never seem to have enough time. We invent and use technology to help us "save time," but in many cases, such time-saving devices only eat away at our "leisure or free time." In other cases, we try to "kill time," or "fill it up" with things to keep us busy. At root, it seems we are trying to control time--charting, measuring, and managing it--for our purposes. But often, it seems that time controls us—we literally don't have time, but rather, time has us--and events are moving too fast for us to stay in control. However, time may not be limited to simply a linear unfolding of events. Our modern sense of time is not necessarily privileged. There are cultural differences in how time is conceived, known and experienced. Past civilizations also had a very different understanding of time than us moderns. Perhaps in our haste and rush, we have been looking for time in all the wrong places. Our modern understanding of time is based on a spatialized construct—time apparently flows in accordance with a spatial sequentiality. The hands on a clock symbolizes the dominant way that we know time. Surely, if we seek to discover and know "a new time," we may need to question and challenge such a view. Perhaps we can explore more liberative, non-linear "geometries of time" that go beyond the confines of three-dimensional spatiality and mechanical constructions of temporality? Have we been living in a sort of monochronic, "temporal flatland," unaware that other dimensions, rhythms, qualities, dynamics, and possibilities for knowing and experiencing time might be available?

The call for submissions that accompanied the Academy-wide Newsletter from the National Program Chair Jean Bartunek and her associates provides a superb and wide-ranging set of possible topics that could explored in relation to the theme. I highly encourage you to look it over. Given that the topic of time is fairly new intellectual territory for the Academy, the possibilities seem wide open. For our division, members might explore the multiple ways time is socially constructed in organizational settings. Others might attempt to theorize the hidden temporal assumptions of our cherished theories about organizational change, change processes, and the whole phenomena of movement and development in time. Ethnographic, phenomenological, qualitative, historical, and survey-based research related to the theme is of course welcomed. More theory-based papers could explore how the qualities of "a new time" might be expressed symbolically in linguistic metaphors for change, in new aesthetic expressions, in new forms of social organization, and even in alterations of our cognitive, biological, and physiological capacities. Some members may be interested in examining cross-cultural differences of temporal phenomena, such as social customs, time horizons, etc. and their implications for managing and facilitating organizational change. What implications does "a new time" have for the future of OD interventions? Those envisioning the future of OD practice might explore what it means to conduct interventions in virtual corporations, where there is little opportunity for face-to-face meetings. Does "a new time" open the doors to new forms of "cyber-consulting"? Yet other possibilities may seek to explore new and imaginative ways of understanding and experiencing time—drawing from disciplines and fields of inquiry that lie outside the boundaries of organization theory and practice. Creative symposia might go beyond simply presenting abstract representations of temporal models to interactive events that model new ways of embodying and experiencing time. Some may even wish to submit papers or symposia that have a "futurist," "sci-fi," and "prophetic" orientation—offering insights into what a new time might look like—for better or for worse.

A new time also calls for new forms of expression, new ways of generating and sharing knowledge, and new ways of nurturing our members. I highly encourage innovative and interactive symposia and suggestions for designing paper sessions that break the mold and rigidity of traditional Academy sessions. In line with this initiative, the 2000 Academy meeting is also creating a new outlet—a new category of submissions--for those of you that wish to explore the theme in a more artistic fashion. What is deemed the "Art/Poetry" category, will include "expressive media," namely two and three dimensional artwork (e.g., painting, collages, photography, sculpture, mixed media, graphic design, computer-generated imagery, etc.), as well as poetry. I know there are a lot of closet artists among our members, so here is your chance to come out and go wild. However, submissions to the Art/Poetry category should be sent to J. Keith Murnighan at Northwestern University. Check the All-Academy Newsletter and AoM website for more details on submission guidelines.

Submission Process

I cannot emphasize this too much: read over and follow the submission guidelines in the All-Academy Newsletter or

AoM Website (you can download the information at, http://http://www.aom.pace.edu)/. Like last year (but hopefully minus the bugs and glitches), your abstract, title page, and affiliation information will need to be submitted over the AoM website before mailing the printed versions of your submissions. This is because you need to receive what is called an "electronic submission number" from the AoM website (see URL above). This number should appear on your hard copy/printed versions that you submit by mail.

Be sure to print out the electronic submission, as it will serve as the cover page for your printed submission. A printout of your electronic submission should contain the following information:

- The electronic submission identification number
- Formal name, postal and e-mail addresses, telephone and FAX numbers of all authors or presenters
- Title of paper or session
- Up to a 250 word abstract of your paper, art/poetry, or symposium submission
- The single division or interest group receiving the paper submission. Papers can only be submitted to one division/interest group. In case of a symposium, identify all the divisions or interest groups receiving the submission. Please use the same name and affiliation on all submissions, and proof carefully.

There are more requirements for preparing and mailing your submissions, so I highly encourage you to consult the national newsletter for the details.

A new time also brings new uncertainties. We have no way of predicting the impact of the Y2K bug on the electronic submission process, so be on the safe side, and try to get your electronic submission number before January 1, 2000. The deadline for receiving mailed/hard copies of your papers and symposia submissions is January 7, 2000.

Send your submission with the copy of the web-based electronic printout sheet to Professor Ronald E. Purser, College of Business, San Francisco State University, 1600 Holloway Avenue, San Francisco, California, 94132.

THE BUSINESS SCHOOL OF THE FUTURE: SOME PERSONAL REFLECTIONS
by Jerry I. Porras

ODC 1998 Distinguished Speaker

What I want to discuss here is my personal view of where the leading business schools are today, where they need to be tomorrow, and some indications of the sources of resistance to change. I want to be clear that these are my own private musings as I have not gone out and done extensive research on the topic. I have drawn first and foremost on my 26 years of experience at Stanford. My thoughts have also been supplemented with reviews of several classic studies of business schools such as the Gordon and Howell study (1958), the Porter and McKibbin study (1987) and some articles from keen observers of the "business school scene" such as Hal Leavitt.

What Do the Leading Business Schools Look Like Today?

The ‘70s and ‘80s and much of the ‘90s were golden years for business schools in research universities, their faculty and MBA graduates. During this period:

• Substantial resources flowed to them from business, government and foundations.

• Business schools rose to be the more prestigious parts of many universities.

• They attracted the very best and brightest students and, for the most part, business loved their graduates.

• Business school faculty had light teaching loads and substantial time and freedom to pursue their research interests.

• Faculty research predominately focused on basic theoretical issues and was published almost always in academic journals

• Business hired faculty and paid them substantial fees for consulting or for teaching in their internal executive programs.

We’ve all enjoyed this situation to one degree or another. Clearly not every business school benefited as much as I've described above, but compared to other parts of most universities, I dare say that usually business schools tend to be more affluent than their university brethren. So, with some minor differences, this is pretty much what the major business schools look like today.

What Do Business Schools Need to Look Like in the Future?

I believe that over the next twenty years the environmental demands placed on business schools will evolve to be very different than the ones we face currently. The critical difference will occur in executive education, an arena that has grown in importance over the last few years. More importantly, I expect that the demand for executive education will accelerate dramatically in the future decade and a half.

Let's look at some numbers as a place to begin. A recent New York Times article (Nasar, 1998) noted that in 1965 there were less than 10,000 MBAs graduating each year. By 1977 that number had grown to 48,000 and by 1998 mushroomed to 94,000. Based on these figures it appears that currently we have over 1.8 million MBAs in the work force. Twenty years from now the estimate is that the total number of MBAs in the work force will be over 3 million.

These numbers are important from the point of view of executive education because an MBA program experience teaches a person that a conceptual base for management exists and that new knowledge will be continually generated. Therefore, it is important to periodically return to an academic environment and get updated on that new knowledge. Demand for new knowledge will continue to grow and satisfying this demand will become increasingly important to business schools.

When executives return to school their needs are very different from those of MBAs. They want ideas that can help them deal with the problems they face on a daily basis. The more thoughtful ones look for concepts behind best practices. They look for more theory than the MBAs do. My view is that MBAs are looking primarily for best practices so that when they leave school and get a job they can "hit the street running." Executives are experienced enough to understand that best practices come and go and that the only thing that really lasts is the conceptual underpinnings to current best practice. This is what they really need and look for.

As one result of the growing number of MBAs in the market place, business schools of the future will be doing much more executive teaching than now. The explosion of MBAs will create (in fact, it has already begun) a thirst for continuing education as part of a lifelong learning process.

One not unreasonable scenario describes a dramatic shift in the teaching contributions of business schools. Today the typical research oriented business school allocates approximately 70% of its teaching resources to the MBA program, 20% to executive education and 10% to the Ph.D. program. I believe that in the next 15 years or so a distribution of 50% of resources into executive education, 40% into the MBAs and 10% into the Ph.D. program will be more appropriate.

In my opinion, this dramatic reallocation of resources would best be accomplished not by putting less absolute effort into MBA programs but by growing the total size of a business school faculty and putting the extra faculty effort into executive education. On a relative basis less will be invested in MBA education, but more importantly, on an absolute basis, substantially greater effort will be placed on executive (lifelong learning) programs.

Can Business Schools Satisfy Future Executive Education Needs and Remain Configured as They Currently Are?

Since executives look for relevance, applicable ideas and cutting edge thinking, can business schools deliver it with its current faculty makeup? I doubt it. Two things must happen. First, to respond effectively to these new demands, our current faculty must evolve both their research and teaching approaches. Second, we must hire different kinds of faculty, ones whose research and teaching interests differ in some critical ways from those of current faculty.

Ideally, research should drive teaching. If so, then what must the research portfolio of business schools look like to deal with the new world I have predicted?

Perhaps it would be useful here to say a few words about research and the difference between what Gordon and Howell call "pure" (basic) research and applied research.

"Pure (basic) research in business administration implies more than abstract concepts and the broad generalizations of theory. It implies going back to the foundation disciplines on which the study of business must rest and seeking to develop theories and concepts which may ultimately be useful in the study of business behavior and business problems. Pure (basic) research can, of course, be "problem-solving." Its problem-solving character depends on the kinds of questions that are asked and on the operational nature of the statements that are made, and not on the degree of abstraction that may be

involved" (p381).

"Applied business research may be at several levels. It may be analytical, descriptive, or merely observational. It is analytical if an attempt is made to draw significant generalizations from a body of data through systematic use of the best analytical tools that are available or can be constructed. . . . Descriptive research records and classifies; it offers descriptive generalizations but does not use analytical tools to draw general inferences. Observational studies are what the term implies -- the collection and reporting of fact" (p381).

Using Gordon & Howell's perspective the simple basic-applied research continuum could be made more complex by incorporating two types of pure research and three types of applied research. It might then look like this:

PURE APPLIED

|________|_________________________|____________|____________|

Pure Problem Analytical Descriptive Observational

Solving **Applied Applied Applied**

Pure

Today, the majority of faculty at research business schools most likely would load toward the pure end of the spectrum, currently a situation that most faculty members wish to maintain. Faculty members at the applied end are rare. However, I don't think the future will sustain the present configuration.

If I have correctly predicted a future in which we will have to substantially increase our emphasis on lifelong learning activities then we must change what we teach. To do this well we must do different research to drive the teaching needed by executives involved in lifelong learning at our business schools. This means that an increasing number of faculty must be doing research that sits more toward the middle of the continuum proposed above, research that has one anchor in the pure world and one in the applied world.

Practically this means that from the pure world would come the use of rigorous analytical research methodologies and a drive for theory to guide the research. From the applied side would come topics that are of real interest to managers, ones that they need insights on so that they can more effectively guide their organizations. We must be able to generate ideas that represent not only generalizable theory but also theory that can be used to solve the problems of everyday managers.

Does this mean that we should get rid of all the pure researchers in our schools? Absolutely not! What it does mean is that we should have a much more balanced portfolio of faculty research interests. At present we are too skewed in the pure research direction. Most faculty at research based institutions do not do applied research. It needs to become legitimate for at least some portion of a business school faculty to do a substantial amount of that type of research. Having more applied research oriented faculty can help in shifting the interests of the overall faculty in the needed direction.

But the largest change in terms of numbers of people should be in the middle of the distribution where people are doing research that is somewhat basic in nature while at the same time has a potential application dimension to it. Using the continuum above as a reference, we need more people to do pure research with a problem solving focus as well as applied research with an analytical focus. Perhaps most importantly, we need research that was not identified in the continuum above but sits between the two general types. I call it "bridging" research, i.e., research that equally combines the pure and applied approaches.

What blocks us from changing?

What are some of the resistances faculty have to changing their research focus. Here identifying the sources of influence which determine what type of research is best becomes very important. At present, since so many of our business school faculty come from disciplines they have their first allegiance to the discipline and the profession. This is their key audience. They get stroked and rewarded by colleagues in their field and therefore respond to the norms established in the profession. As Leavitt (1996) noted, "Too much research, I fear, is being done for those wrong reasons of approval and ambition rather than the right reasons of excitement and challenge." (Pg. 299) The approval comes from the profession and satisfaction of ambition occurs when members of the profession write strong recommendation letters at appointment and promotion time. In both cases, the profession, not managers in the business world, provides the basis of the incentive.

Resistance also comes from the very concrete reality that faculty deeply invest and commit themselves to a particular research topic and approach. Changing that is asking a lot and strong resistance can be expected. If change in research focus can occur at the margin, e.g., shifting from exploring a basic phenomenon to studying it in such a way that it has more practical application, then perhaps resistance would be reduced.

A third source of resistance is rooted in the measurement and reward systems employed in most business schools. Faculty members primarily are evaluated and promoted according to the number of articles they publish in leading refereed journals. Writing books is not highly rewarded activity, especially for young faculty, unless they are targeted to an academic audience and report an empirical study. Since books are one of the more important sources of business knowledge for managers, business school research becomes less accessible to organizational leaders.

Overcoming these and other resistances to precipitate change clearly remains a difficult task. Business school deans must exert stronger leadership than they have in the past for they cannot expect that the driving force for change will come from the faculty. Change may be implemented in a variety of ways, but in all cases the Dean is key. Creating a compelling goal that might drive change in the desired directions could be a powerful tool for Deans to use.

Concrete organizational changes, certainly within the realm of a Dean's prerogatives, provide other leverage points for action. Re-structuring the definition of those activities constituting teaching to raise executive teaching to the same level as MBA teaching; changing incentives; developing faculty skills in executive teaching and bridging research; altering the cultural methods to change the value placed on these different teaching and research activities; and hiring and promoting faculty with different skill sets are some of the more important mechanisms that might be used to create the desired faculty behavior change.

Conclusion

The future I foresee involves a shift in the educational demands coming from our environment. This will require business schools to shift from a primary emphasis on MBA teaching to executive teaching. This shift will then drive a change from basic research to bridging research. The change actions needed to execute these shifts in behavior are numerous and challenging. However, if we don't get moving on them today, at some point in the future we will all suffer the consequences. One of those consequences could well be that we lose control over graduate education and the valuable contribution we can make to life-long learning. Any void that exists will likely be filled by consulting organizations, and this will probably mean that most of what is taught will not be research-based. The result may be a curriculum driven by best practices, which could lead us to a business environment where managers continually bounce from one fad to another. This is not a future any of us want!

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PROFESSIONAL DEVELOPMENT WORKSHOPS

August 4-6, 2000
Call for Proposals

What was once the "Pre-Conference" part of the program is now called the Professional Development Workshops (PDW) portion of the annual conference.

Professional development workshops (PDW's) take place from Friday noon until Sunday noon. This time set aside for special activities organized by the divisions and interest groups. These activities are designed to supplement (rather than extend) paper presentations and other activities that take place from Monday to Wednesday. They include but are not limited to doctoral student and faculty consortia and workshops on teaching, research, and consulting. This part of the program is not open to submissions through the regular submission process.

Division PDW programs are planned well in advance of the submission deadline for the regular Academy meeting. Individuals wishing to become involved in organizing a PDW activity for ODC need to submit proposals to the PDW chair (in the case of Organization Development) Dr. Peter F. Sorensen Jr. by November 15, 1999.

Theme: A New Time

Procedures For Submitting Your PDW Proposal

- **It may include any one of the following or be creative; a workshop, consortium, symposium, invited speaker, panel discussion or presentation, paper session, debate, tour, meeting, keynote address, service activity, or reception that is sponsored by one or more Academy divisions, officers or committees.**

1. Submitter (contact person) information: name, affiliation, address, phone, fax, and e-mail

2. 250 Maximum description

3. Session Title

4. Keywords

5. Is session oriented towards teaching? Is session oriented towards informing management practice?

6. Proposed day

7. Proposed times (beginning and ending times)

8. Requested room size (max room size limit menu)

9. Requested seating configuration (hotel options menu--rounds, theater, etc.

10. Policy regarding participation (pre-registration required, by invitation only, or no restriction)

11. Special instructions to be posted on the AOM web site

12. Additional 1 sentence information to be printed in the program

13. Information on all participants: name, affiliation, phone, and fax, e-mail

14. Roles & order of participants

15. Additional sponsors

By November 15, we ask you to submit data on each of your sessions to the ODC PDW Chair Dr. Peter F. Sorensen at his Benedictine University e-mail address: aompsorensen@ben.edu. Hard copy can be sent to Dr. Peter F. Sorensen Jr., c/o Benedictine University, 5700 College Rd., Lisle, IL, 60532-0900. If you need to contact Peter please call him at 630-829-6222 or 630-829-6208.

IT IS TIME TO MOVE FROM HR TO OE

by D.D. Warrick

It took decades to move from a maintenance oriented Personnel mentality to a Human Resources mentality that began to make significant contributions to the organization. Now it is time to move from a Human Resources mentality to an Organization Effectiveness mentality that radically changes the mission and roles of what has been known as HR. Several authors and practitioners have been sounding the alarm for HR to adapt to a changing organization world, none more brilliantly and prolifically than Dave Ulrich. However, time is running out for HR to take a leadership role in reinventing itself so it will play a more vital role in the organization of the future.

How An OE Department Would Differ From An HR Department

Traditionally, HR has focused primarily on hiring, firing, wage and salary administration, benefits, labor relations, performance management, and training with some progressive departments providing change agents who's role is to help improve organization effectiveness. In times where competition is intense and many organizations are spinning out of control and unraveling as they push people to work faster, harder, and smarter while doing more with less and often facing the added upheaval of mergers and acquisitions, the traditional approach is not sufficiently contributing to making the organization more effective.

The simple and focused mission of an OE Department would be *to help significantly improve organization eff*ectiveness. This would mean combining HR and Organization Development and Change efforts into a united effort with a common OE mind set and structuring and staffing the department around the mission. In developing an OE mindset, all members should receive training in understanding the organization and what it takes for the organization to succeed (business training) and in Change Agent skills. One of the first roles of OE would be to help the leaders of an organization define what organization effectiveness is. While there could be many definitions, the definition would need to include *a people/performance balance, a commitment to building a high performance organization "and" a great place to work, and an emphasis on leaders leading.* These seem to be the essentials as reported in studies on high performance organizations that are built to last (see, for example, Collins and Porras, Kotter and Heskett, and Pheffer in the footnotes).

Possible Roles For An OE Department

The question of course is what an OE Department would look like. While the needs and resources of various organizations would differ and therefore would require different approaches to OE, I would like to offer some thoughts about possible functions. Keep in mind that many of the functions could be staffed by the same person or persons, sub-contracted, or outsourced.

Organization Strategy, Design And Alignment. This function would be responsible for being an expert on organization strategy, design and alignment, developing an OE model that could be used throughout the organization, facilitating strategy development and planning, helping design the organization for results, and aligning the organization with the organization vision, mission, core values, and strategic goals.

Leadership Development. The role here is to provide a leadership process for developing current leaders throughout the organization and growing new ones. Noel Tichy and Eli Cohen's book, *The Leadership Engine*, is an excellent resource on the importance of leadership and having an on-going leadership development process. It is also important to be developing Transformational Leaders who are skilled at leading, championing change, and transforming organizations.

Organization Development, Change, And Transformation. The purpose would be to provide expertise and internal consulting services in the areas of Organization Development, Change, and Transformation.

Human Resource Management. This function would cover the more traditional HR roles but with an OE perspective. For example, the function could be responsible for human resource planning, recruiting, wage and salary administration, benefits, labor relations, and performance management. Particular attention would need to be given to recruiting and retention.

Human Resource Development. The role would be to prepare people throughout the company to excel at their jobs and to integrate training and development into the company vision and strategy.

Culture Management And Merger Integration. The mission would be to help define and build the desired culture for the organization and to develop expertise in integrating mergers and acquisitions. A valuable role would also be to help the leaders fully utilize the organization vision, mission, values, and goals.

Organization Assessment And Reality Testing. Knowing reality and not operating with illusions about reality will be essential to an organization's success.

Organization Effectiveness Information Systems. The technological advances made in applying Information Technology to HR have made it essential to have one or more up-to-date IT persons with HR and ODC training and an OE perspective.

Rewards And Compensation. The competition for attracting, motivating, and retaining the best talent and for aligning rewards and compensation with strategy could make this a high impact function.

What It Will Take To Transition From HR To OE

Transitioning from HR to OE will require transformational change. What is possible in a particular HR Department will be defined largely by how close an HR Department can come to:

1. Having a high level HR Vice President who understands OE and will lead and champion the transformation process.

2. Having the support of senior management for the role change.

3 Having one or more change agents who understand OE and will help guide the transformation process.

4. Having HR members who are committed to the process and are willing to learn new skills and ways of viewing their role.

5. Having a willingness to redesign and staff the department around an OE mission.

One final thought. An assumed but not to be overlooked role of an OE Department will be to champion the importance of a people/performance balance in helping organizations succeed. The people part of the equation is all but being forgotten by many organizations as the pressure for performance increases. It is reducing the commitment to people to considerable talk and very little walk and is a strategy that at best will achieve short term results and long term grief for the organization and the employees.

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CREATING CONVERSATIONS FOR CHANGE: LESSONS FROM LEARNING HISTORY PROJECTS
by George L. Roth

1999 Best Paper Related to Practice Award

What if people took conversations in organizations seriously and considered them as *the* basis for organizational change? If managers were aware of the power of conversation in creating change, would they not give more time and attention to what informs their conversations? The social construction of reality (Berger & Luckmann, 1966) proposes that human actors construct their reality, and hence organizational life, through their social actions, interactions and their interpretation. Organizational actors are, however, generally unaware that "reality" is their own invention, and that their understanding does not exist independent of them. Conversations are important vehicles in the creation, maintenance and modification of reality (Berger & Luckmann, 1966). Just as conversations modifies reality by virtue of whether something is talked about, conversations can themselves become objectified and take on the same permanence as the objects that are spoken about. The way people interpret what happens - their mental map for making sense of the territory - becomes confused with the territory itself (Argyris, 1990).

Conversations can be captured. An individual’s narrative, including his or her opinions, evaluations, and judgments, can be produced as a text. Text, like any other data, does not speak for itself. It is interpreted in creating a new second-order reality that goes beyond what is stated in the original text. Readers bring their own experience to what they read. A group of people that engage in the interpretation of text is a process that creates new and shared understanding.

Background

In 1992 I gathered a group of people to capture and document a dozen or so projects that involved developing learning capabilities in organizations. This paper is based on my reflections on the projects that were undertaken through the MIT Center for Organizational Learning from 1992 to 1997. The people that undertook projects through the MIT center were unanimous in their support and accolades for organizational learning. Yet, outside of those who were directly involved, there was little direct evidence for the benefit of their learning. The personal nature of the improvements created a dilemma – while the individuals were able to attest to their own and other’s development of capabilities, the link to organizational results was unclear. They wanted to tell their story, and see it told in a way that was true to their experience, including their triumphs, failures, and questions. If researchers wrote detached reports, how would anyone really learn from them? To respond to their concerns, and find a way document and assess these experiments, we combined learning techniques with research processes to create an approach that we called "learning histories."

Learning Histories & Learning from Experience

Learning histories part of a process that engages a broad population in an organization to consider a critical event or an improvement initiative. The process produces documents that are disseminated to help people become aware of change efforts. These documents are typically 50 to 100 pages long, providing a retrospective account of significant events in an organization's recent past. Its contents come from the people who initiated, implemented and participated in the original efforts, as well as non-participants affected by them. It presents the experiences of the groups of people who have gone through a change effort, in their own words, in a way that helps the rest of the organization move forward. The document is used in workshops by other teams in creating a common observable context for their own conversations on what happened, why it happened, how it applies to them, and how they can improve their own action (for a detailed description see Roth & Kleiner, 1998, for examples see Roth & Kleiner, 2000 and Kleiner et al, 2000).

In the efforts capture and create organizational change through learning histories several lessons have been learned. These lessons can be considered good characteristics of *any* qualitative research whose aim is that it is used is useful to the people that are studied. Nine of these lessons help in characterizing the process and its results (for more detailed descriptions see Roth, 1999).

1. Include skill development for conversation and inquiry: Learning histories are data, and data does not speak for itself. Within a learning history document there is the narrative of participants' inferences, assumptions, beliefs, judgments and conclusions about what did, or could have, happened. People need new skills to make sense of data.
2. Use reflective conversations as the basis for assessment: An important consideration in asking a person about their "experience" is their reaction and how it influences the information they provide. The predominant reaction that people have to interviews is that they are being evaluated, what they say will be used to judge them, and that these judgments may affect them adversely.
3. Start with "noticeable results": Most thoughts people have and actions they take in everyday organizational life operate in the background of their attention and, hence, are hidden in the familiar and obvious. When organizations undertake improvement initiatives, they expect certain things to happen (as well as other things not to happen). The idea of a "noticeable result" being singled out as a focus for inquiry is that it is different from what anyone involved, or even an outside observer, had foreseen.
4. Explicitly link first- and second-order reality: A common finding is that many organizational difficulties stem from when people treat their judgment as if they were invariable facts. The reasoning process by which people connect what they observed to their judgment becomes an object for inquiry. The goal of a learning history is to be able to document people's attributions, interpretations and generalizations to their description of what

happened.

5. Work in insider/outsider teams: Insider and outsider perspectives are needed in deciphering the meaning organizations places on what is said and done. The insider/outsider approach recognizes, for example, that theory is not the sole province of outside academics (Bartunek and Louis, 1996).
6. Let no single voice provide the truth (including "objective" researchers): People in different parts of organizations develop local explanations for what happened in change efforts. Their explanations uphold the centrality of their own actions in achieving success, and avoid any responsibility and blame larger organizational conditions for failures. In presenting changes from multiple perspectives, a learning history makes visible across a population of individuals what is collectively hidden.
7. Separate writers' understanding from participants' narrative: A two-column format is helpful in including, yet keeping unobtrusive, researchers' commentary, analysis and perspective on participants' narrative. Full column text is used for context setting, exposition, and "setting up the telling of a story." In two-column formatted sections the major column is predominantly for participants' narrative. The minor column is used by researchers to comment on the major column narrative.
8. Engage people in validating the document: A learning history is created so that it will be read and discussed. Conversations that take place in skill building sessions are used to disseminate learning histories. Providing a learning history to people without giving them an opportunity to discuss its contents does not allow them to make collective sense. A facilitated workshop process has been used to create the settings where people develop a better shared understanding of learning and change processes.
9. Seek universal understanding in the particulars of local situations: Delay and corruption in the information that is communicated, distance in time and space between action and results, and limitations in human cognitive capabilities all contribute as sources of error in managerial judgment and decision-making (Sterman, 1994). The important challenge is in helping managers become more aware of themselves as part of a larger system, and learn how to contribute to and operate with better feedback and a greater awareness of the consequences of their actions. Within the particular details of almost all situations, there are universal patterns that relate to the general conceptions for management practice.

Discussion

In reflecting upon the learning history projects, I realize that bringing this type of research into business organizations is a revolutionary undertaking. The actual process of conducting a learning history is itself relatively benign. It involves facilitating, capturing, writing and creating conversations in organizations that make the multiple truths that underlie people's thinking and acting visible. Learning history projects started out as straightforward efforts to collaboratively develop and apply rigorous, predictable and systematic approaches in this process.

For the most part, there has been a positive benefit in all the companies we've worked with. However, there have also been conflicts surfaced as individuals met resistance in carrying out the prescribed tasks. Some learning historians weren't getting the support that had been initially offered, or they find that their acceptance was not as unanimous as they talk broadly to people in the organization. Collectively examining the stories people had told, and giving individuals in the organization the opportunity to arrive at their own assessment, was counter to many people's expectations that higher level managers would tell them what to do. As the learning history process creates accessible data, and involves a wide range of people in its assessment, it alters the traditional organizational process of information flowing up and directions flowing back down.

When the *values* that underpin research are examined, the revolutionary nature of learning histories in business settings becomes evident. Assumptions around ownership, property rights and authority are key premises that drive behavior and support performance-oriented practices in business. The behaviors and performance of research practices are based on different assumptions. Research practice is based on freely available, valid data and the ability to interpret it in multiple ways. In essence, a research orientation dissolves hierarchical privileges, implying a different basis for determining collective action. It will, however, take some time for organizations to adopt the concept of conversations that shift thinking as the basis for action.

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PUBLICATIONS OF ODC MEMBERS FOR 1997-1999

The Summer 2000 issue of the ODC Newsletter will include a bibliography of articles published by division members in 1997-99. Citations for this list will be obtained from a computer search on the ABI inform database. Admittedly, this database does not list all professional publications in the field. Therefore, if you will send us a list of the articles you have published in 1997-99, we will make sure they become a part of this valuable resource. Please send the complete citations to Wayne.Boss@colorado.edu.