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## CALL FOR PAPERS: EXPANDING HORIZONS

*by Susan A. Mohrman*

We approach the 1991 meetings with a new name, and hopefully energy in the division to expand our horizons, to further our focus and capabilities, and to address the challenges that face organizations as they approach the next millennium. Our new name, Organization Development and Change, makes official a concern we have always had with organizational change. It also invites us to take a broader focus on the planned or unplanned change that is being relentlessly experienced by organizations. The overall conference theme, "International Dimensions of Management," points us in the direction of another challenge facing organizations and scholars and practitioners of O.D. Miami is an ideal location for remembering that organizational development and change takes place in an international arena, and for learning from our colleagues of all nationalities about international applicability of various theories and techniques.

In keeping with the general directions established by the Executive Committee last year, we would like to encourage submissions that take a broad view of development and change, including treatments at various levels of analysis

and from multiple disciplines. We encourage the import of ideas and frameworks that can enliven the intellectual exchange at the meetings, while keeping in mind their potential applicability.

As a result of discussion at last year's business meeting, we will have a special category of submissions called "Ideas in Progress." We encourage submission of papers that contain promising but not fully developed ideas that can generate lively discussion. These papers will be reviewed separately, so please indicate on the cover that your paper should be reviewed in this category. Although the ideas may not be fully developed, criteria for review will include the clarity of presentation and sufficient development to convince the reviewers that this topic will yield a fruitful and interesting interchange.

Concern was also expressed at the business meeting that many sessions have not provided time for interaction among presenters and the audience. We ask that symposium proposers be especially sensitive to this issue, and design a session that has a realistic probability of being interactive.

## Call for Papers

With the above issues in mind, we invite you to submit papers and symposia. Please keep in mind that symposia can be submitted to more than one division, and that sessions sponsored by two or more divisions may bring a more diverse audience. This may further our goal of increasing our linkages with multiple disciplines.

Please follow the specific rules and guidelines for manuscript preparation that are outlined in the general Academy Newsletter. If for some reason you do not receive it, you may contact the general program chair, Professor Don Hambrick at Columbia University (212-854-4421).

Reviewers will be given the option of rejecting papers that do not adhere to the length guidelines, so please keep your papers within the limits.

The deadline for the receipt of papers is January 7, 1991. Manuscripts should be submitted to: Susan A. Mohrman, School of Business Administration, The University of Southern California, Los Angeles, CA 90089-1421. Send express deliveries to: The Center for Effective Organizations, 3500 S. Figueroa, Suite 208, Los Angeles, CA 90007).

## **A NEW NAME REQUIRES NEW BEHAVIOR**

*by Robert E. Quinn*

Two years ago the executive committee met to assess the state of the field, and in the winter OD Newsletter we reported the results. We noted that many things had changed: students see OD as their "first" home in the Academy; papers submitted to the division are not very exciting; and we are failing to capture the good change research that is going on elsewhere. Further, we concluded that the ideal division would be more intellectually dynamic, less narrow and traditional, more global and interdisciplinary.

Given the above, the very first strategy suggested was a change in the name of the division to Organization Development and Change. The proposal went first to division members and then to the Academy. It has now been approved.

The primary intent of the proposal was to underline the fact that the field has grown beyond the normative development-oriented techniques and frameworks that served as the early content of the field. These will always be a part of OD. We need, however, to reach out. We want to include work that expands our understanding of change in organizations. Any work that accomplishes that objective in a quality way is a welcomed part of our division. It is now our responsibility to understand and pursue the vision. We need to think twice before writing the criticism, "This is not OD." Indeed, we need to be careful to reward those who take us at our word.

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## **NEWS ABOUT MEMBERS**

W. Warner Burke has received The Distinguished Contribution to Human Resource Development Award of the American Society for Training and Development (ASTD). The award was presented at the Society's 46th annual conference.

Joanne Preston of the University of Richmond has been named as the new editor of the Organization Development Journal. Thomas Head of DePaul University and Richard Engdahl of the University of North Carolina-Wilmington are the new Associate Editors. The new board takes over the Summer of '91.

David E. Terpstra has taken a faculty position at the University .

Richard W. Woodman has been named The Anderson Clayton & Co. and The Clayton Fund Professor of Business Administration at Texas A & M University.

## **CONSULTING AT A DISTANCE**

*by Craig C. Lundberg*

Several years ago I had a consulting experience like none other before or since. I have thought back to it often, turning it over and over in my mind. My captivation with that experience, on the one hand, is easy for me to understand--it was so unique in so many ways and so contrasted to my other consultancy experiences. My continued fascination, however, stems from all of the questions it raises--from, was it OD?, to, how might I have behaved more effectively?

I confess to several beliefs that prompt this sharing. One is that we can learn more from unusual or extreme cases than from those typical or modal ones. A second belief is simply that we have to describe and share our experiences carefully to learn from them. Lastly, if we share what's puzzling, bothering, or intriguing, our OD colleagues will usually help us make sense of it.

While OD as more or less intentional change continues to evolve both in theory and practice, most conventional thinking continues to elaborate or modify it as a multi-stage process reflecting Lewin's original unfreezing, change, refreezing model. Kolb and Frohman's seven steps of planned change are typical: scouting, entry, diagnosis, planning, action, stabilization and evaluation, and termination.(1) Such simple, linear sequences are seldom followed, however, in actual practice. Experienced OD practitioners and consultants know that such a sequence is occasionally, even frequently truncated, interrupted, delayed or aborted, and that it is subject to many distortions such as a lack of goal and problem consensus and clarity, favorite or even pre-packaged interventional technologies, restricted diagnosis, client dependency, hidden agendas, and the like. Whatever your current understanding of the OD process, the following case will probably not fit it very well.

## The S.I.T. Case

It began, as does so many engagements, with a telephone call. The caller, Ed, identified himself as the full-time OD person with the Southwestern Indian tribe (S.I.T.)(\* located two states away. Ed said he'd surveyed the OD literature and had come to believe that Dr. W., one of my Colleagues, held the values and experience that the S.I.T. needed. Ed had tried unsuccessfully to reach Dr. W. and had called me in hopes that I might set up a meeting. Ed noted that he had been working with the executive branch of the tribal government for nearly four years, that he was "probably in over his head"; and that he believed some external assistance was needed for the tribe to go forward. Ed was also clear that the S.I.T. was seeking free consulting. He suggested that he and several others could come to my city to meet with Dr. W. and any others who might be interested in working with the S.I.T. We picked out a date a month away and I said I would try to get Dr. W. and several others from our academic organization together so we could mutually explore the possibilities of helping S.I.T.

On the appointed day at 10:00 a.m., Ed, who turned out to be an Anglo, and three Indians in their thirties came to our conference room where Dr. W., Dr. M., Dr. C. (all experts in OD and leadership, strategy, and socio-technical

systems respectively) and two advanced doctoral students (one familiar with the S.I.T., the other an experienced management consultant) and I had gathered. After introductions, the next two hours were devoted to questions by my colleagues and responses from our Indian guests. We learned much of a general background nature: S.I.T. was much less studied than other tribes by anthropologists and others, S.I.T. was quite poor as a tribe and heavily dependent on the revenue of one mining firm beyond the usual governmental support; that the Indians present all held college degrees from various major universities, but that most of the tribal members had little schooling; that the S.I.T. culture and language was very unique; that they had no experience with consultants; that S.I. T. was really a set of about a dozen villages spread over a vast, high desert region; and that one neighboring tribe was perceived as increasingly encroaching on their lands. During this questioning Ed was largely silent except in response to questions about S.I.T. culture which were almost always referred to him.

Reconvening after lunch, Dr. W. pressed for what our guests wanted from us. The response, which took some time to get to, held two hopes. One was the general belief that the executive branch of the S.I.T. was antiquated and highly bureaucratized and badly needed redesigning to become more effective, though no specifics were offered. The other wish articulated was that since this visit was unauthorized, and the tribal council would probably not approve of outsiders becoming involved, that any future consultations would have to be free and take place away from S.I.T. As time was running out, everyone murmured agreement to meet again to pursue some sort of joint work. It was left that Ed would call me again to set up another meeting whenever the Indians could next visit.

Ed called nearly two months later. He and his colleagues would be visiting in two weeks' time. An afternoon meeting was agreed to. I notified my colleagues. I then found and read two ethnographies about S.I.T.

When the S.I.T. members appeared for the second meeting, I was joined only by the two doctoral students--my other colleagues offered me one or another excuse for not attending. The meeting began with one of the students who kept extensive notes that recapped what we had learned about the S.I.T., its executive branch, and the consulting constraints. I chimed in with some things I read about S.I.T. in the ethnographies. To our surprise, the Indians (Sam, David and Tom, Executive Director, Assistant Director, and Fiscal Officer, respectively) gently "corrected" almost everything! They were clear that no published materials accurately described the tribe--secrecy was a strong tribal value. They said as Anglo-trained members even they weren't privy to some inner tribal things. During the next several hours, we basically retraced the ground previously explored. This time, however, two things were different.

We wrote almost everything down on newsprint, and the Indians often disagreed among themselves. Ed, as before, was mostly silent. By afternoon's end we had agreed on a couple of things to work on, voiced by Sam--to examine the functions and structure of the executive branch, with the idea of suggesting improvements and that we'd try to meet again in two months' time. With that the Indians went off to spend the coming weekend in the city. The students and I went to a local pub to debrief and over a couple of beers agreed that we were getting a much better feel for their situation, that the afternoon's conversation reflected a real openness to our assistance, and that none of us felt very sure of what might happen next.

Six weeks later Ed called to suggest a half-day meeting in two weeks, again on a Friday. I agreed to his proposal. On the scheduled day, however, I was alone to greet Ed and four Indians, two I'd not met before. Sam and David were back, joined by Joe, the head of the police force and John, head of personnel. In this our third meeting, the pattern of future meetings--just with me--was established. Each meeting was attended by Sam and Ed and two to four associates--at least one always a new face; we worked for about five hours, less a meal; the meeting flow fell into a sequence of small talk: they informed me of current events on the reservation during which I probed modestly; they told me what parts of the actions we talked about which they had initiated, again with clarifying questions from me; we focused on some issue or topic and jointly talked it through to some concrete suggested action (always with newsprint recording the discussion); then the Indians left to enjoy some event in the city and Ed visited his mother in the suburbs.

The third and subsequent seven meetings were always held in a conference room near my office. They occurred irregularly, separated by from one to three months and always on a Friday. During the third meeting two things happened that stand out in my memory. One was a compliment to Joe about his cowboy boots. I noted that they were obviously handmade and had stirrup marks--this prompting a conversation about horses and riding in which Joe and the others learned I was an ex-rodeo hand and experienced horseman. The other incident was when I noted to Joe and John that their departments paralleled two of the tribal clans in the old days which lead to an examination of other parallels between the old Indian social structure and the modern form of their government. Both incidents, I now see, gave me a degree of trust not present before.

In the third through tenth meetings (over nearly a year) we dealt with a series of topics. My notes show that we twice redesigned the formal structure of the executive branch, redefined the job descriptions of department heads, outlined

a renegotiation with the mining firm in which the tribe increased its revenue, revamped the recruitment and selection criteria and process for executive branch managers, redesigned Sam's biweekly meetings with his department heads, practiced task analysis, role analysis and team processing with whoever was present, and designed a joint meeting with the tribal council. By the six meeting onward, I found myself more and more cautioning them against adopting theoretical organizational and managerial solutions without careful adaptation to the S.I.T. culture--in fact urging them to seek opportunities to learn more about S.I.T. ways, e.g., attending Kivas, visiting village elders, dressing less "Anglo" during tribal ceremonies, etc.

By the seventh meeting, Sam, David, Ed and I agreed that a crucial relationship that needed work was between them as key members of the executive branch and the members of the tribal council. The council were all elders, elected from the villages, and the arena where major political and fiscal decisions were made. We strategized on how to get the council better informed on executive branch affairs and to build better relationships with council members. Some of this was simply a matter of trading on old family ties, some on Sam and his associates playing down their Anglo education and experiences, and some reappreciating Indian traditional views (on nature, family, community and individual dignity). Our ninth meeting in fact was attended by Charlie, head of the tribal council, and his assistant Bill. While Bill sat silently throughout this session, Charlie and I hit it off quickly and easily, the meeting concluding with a plan for a series of presentations by Sam and his departmental associates to the council. That memorable meeting ended with Charlie inviting me to visit the reservation "next time I was in the area" and the invitation to Ed to help redraft the tribal constitution.

As the months and meetings went by, I learned to be less and less surprised when my Indian friends reported that they had not fully implemented the plans of our last meeting. More and more I took their report on current events and whatever they had done as simply the starting point for that meeting's work. I had grown to really like Sam and David and the others. Ed continued to call me to set up meetings but basically only served as a resource person on the technical aspects of tribal government and on current political affairs. I saw my role as having become a meeting facilitator, a technical resource on management and organization, and a gentle brake on expectations. I frankly "loved" my ongoing education on the S.I.T.

The tenth meeting was devoted in its entirety to designing a long weekend in which Sam, the department heads, and the tribal council were going to go off on a large houseboat together to "get better acquainted and do some joint

planning." We touched on everything--from how the cooking was to be shared, to agenda setting exercises, to how the piloting of the houseboat should reflect tribal status, to how to handle potential conflicts, to fishing bait. Sam led the discussions and everyone contributed vigorously. As far as I could tell, consensus really ruled the resulting designs. Ed was quiet as usual, but his smiles gave away his positive feelings. The weekend we were planning so effectively for clearly had the potential for so much of the other needed work to follow. I recall telling my wife that evening how great it had been, how helpful I had felt, how warm I felt toward my Indian "brothers." Two weeks later Sam called me to report that the weekend had indeed been a great success. His hopes for it all more than satisfied. I would learn the details when next they would visit.

Time went by. The weeks passed. About two months after talking to Sam, I initiated a call to Ed, but got passed along until I had Sam on the line. Sam, clearly subdued, told me that Ed was no longer employed by S.I.T. According to Sam, Ed had had an affair with the wife of a council member, it had been discovered, and Ed was dismissed. Sam was uncertain about what this meant for our work but said he'd get back to me before long. The call never came.

## Comments

This case of "consulting-at-a-distance" seems to break with much of what has become the conventional wisdom of OD consultancy. For example:

- o None of the consultants ever had any insitu knowledge of the client system.
- o Clarification of who the client was never occurred.
- o The generation of what Argyris terms "valid information" (i.e., explicit and verifiable) didn't seem to happen.
- o Contracting between the client system and the consultant(s) was vague at best.
- o It is difficult to see that any planned change or action research sequence of steps was followed.
- o Consultant and client roles changed and blurred as did their relationship.

- o No clear change strategy was apparent.
- o Client motivation seemed to be both highly variable both as to type and strength.
- o Diagnosis was both intermittent and partial.
- o Consultant interventions seemed to often be entwined with other behaviors.
- o Action that was planned was only partially enacted and explicit assessment was non-existent.

Any astute or reasonably experienced OD practitioner will no doubt be able to extend this listing. Most consultants will probably believe they would have behaved differently than I did at several points in the case--I also do some things differently now. Unusual and unorthodox as this consultancy was, I nevertheless believe that some real good did occur. OD consulting across both geographical and cultural distances is different and difficult, yet may be more and more needed.(2) Of course what is mostly needed are appropriate models. Perhaps by pondering the S.I.T. case we can all be better prepared.

\* All names of persons and organizations have been disguised.

## Footnotes

1. Perhaps the first overall planned change strategy was developed by Lippit, Watson, and Westley, *The Dynamics of Planned Change*, (1958), NY: Harcourt, Brace. The best known sequence of stages, however, is probably that of Kolb and Frohman, "An Organization Development Approach to Consulting," *Sloan Management Review* (1970), 12 (1), 51-65.

2. Cross-cultural consulting in fact has a long history and considerable literature. Interested readers should read in the field of applied anthropology, especially the journal *Human Organization*.

## **FATIGUE OF THE SPIRIT IN ORGANIZATIONAL THEORY AND ORGANIZATION DEVELOPMENT: RECONNAISSANCE MAN AS REMEDY**

*by Karl E. Weick*

Some describe the OD Division as a group from which "the zest is gone." As evidence for his description, he observes that the division is no longer a haven for rebels, OD training is becoming more traditional, OD is a secondary divisional identity, papers rehash old ideas, and interests of the division are narrow and consultant-driven.

If the OD division wants to regain its zest, there are two compelling images it can start with. One image concerns an activity that goes to the heart of the issue of zest. Jean Rukkila (1989), writing about what it takes for a visual artist to experience renewal, describes a personal insight: "Today at a restaurant called Alice's I am reminded of a hunch I've had before. Against fatigue of the spirit, there is only this defense: no defense; look again, see."

If that advice is embodied in a role, that role would look very much like the second image, what Maslow called, in the 60s, Reconnaissance Man: "One who embarks on exciting and adventurous missions into the uncharted realm of the landscape within" (Hoffman, 1988, p. 166).

Reconnaissance, or in its verb form, to reconnitre, means an examination to discover the nature of the ground or resources before making an advance. It is a survey made for practical or scientific purposes, and is made to gain information of any kind. It is an activity of mapping and problem finding, that is out ahead of others.

People in OD have done reconnaissance episodically for some time. Reconnaissance occurs when Peter Vaill maps high performing systems, Brown and Covey map community development organizations, Quinn maps romantic involvements, Emery and Trist map turbulence, and Bill Torbert maps the universe. Each of those acts of reconnaissance represent lowered defenses, an effort to look again, and an output which captures something we failed to see before. I think those episodes provide a prototype, both of your distinctive competence as scholars, and of your legitimate role within the Academy. You need to look again at things we think we understand, and you need to claim as your scholarly role, that of being the problem finders of the academy.

The activity of looking again can best be understood by means of a distinction proposed by Glen Ingram (1988), who is the Senior Curator of Vertebrate Zoology at the Queensland Museum in Brisbane, Australia. Ingram has been struck by the fact that field guides of wildlife have rich descriptions of what animals look like, but pitiful descriptions of

what animals sound like. Language is biased toward what is seen, not toward what is heard. That's a problem because we can recognize differences in sound, even though we can't put them into words. Ingram has embarked on a campaign to make eye naturalists into ear naturalists, so their reports will be more complete.

If you are going to do reconnaissance for the academy, then you may want to follow the model of the ear naturalist and try to capture differences that many of us sense, but to which we are not yet able to give voice. I think people like Torbert, Mirvis, or Quinn are ear naturalists. They sense things that defy representation in low variety languages. That doesn't keep them from trying to put into words what they sense. But they get frustrated because the words mask the nuances they want to preserve, and the rest of us are frustrated because we can't figure out what in the world they are getting at. A commitment to reconnaissance is also a commitment to communication and the problem of low language variety. If you can make inroads on those, your legitimacy is assured.

To illustrate the substance of looking again, we can reflect on some puzzling issues that lie close to the surface in the current movement toward global organizations. A reconnaissance of this activity turns up some intriguing problems. For example, right when there is the growing suggestion that feminist forms of organization resemble webs, and that webs are more meaningful ways to tie dispersed organizations together, global organizing is being done by white males preoccupied with regulation rather than adaptability, competition rather than cooperation, domination rather than support.

Consider a different facet of globalization. Conducting complex negotiations in uncertain territory with unfamiliar partners, requires a kind of supersensitive, chameleon-like person, who is able to make immediate emotional contact, and stay where the other person is, even if they don't understand what they are hearing. That complex scenario is close to what people within an NLP framework call "pacing" (Bandler & Grinder, 1975, pp. 15-25) and it is also close to Schwalbe's (1988) important reworking of the venerable concept of role taking. In global interactions, a recurrent pattern--dating from World War II experiences--is one in which the Japanese are disliked intensely but listened to because they are so adaptable, while the Americans are liked but closed out because they are much less adaptable. If you look at academic work such as Bob Axelrod's (1986) studies at Michigan on the evolution of cooperation, those studies can be read as showing guides for pacing. By following the simple axiom, meet agreement with agreement, and meet disagreement with disagreement, partners track each other closely. Their agreements establish community, and their disagreements establish identity. In a post-modern world where meaning

is temporary and where little narratives carry that meaning (Lyotard, 1988), there is a premium on a form of intimacy which scholars of interaction don't understand very well.

The activity of globalization, viewed through your eyes, might suggest additional puzzles that bear closer scrutiny. For example, it has been argued that to compete successfully in a global marketplace, firms need to develop and protect core competencies such as Honda has done with engines or Casio has with semi-conductors. Having said that, now ask the question, is a core competency knowable before the fact? If a core competency emerges and cannot be known in advance, then how can one claim that it is a key driver in global competition? Or take the issue of transformation. As I said earlier, there is a virtual knee-jerk reaction among OD people that revolution and extreme action is necessary for transformation. But what do we know about non-extreme transformation? Nothing. Is such a thing possible? Can there be transformation without crisis? Wal Mart, Disney, American Airlines all look like they might provide an affirmative answer. Do they? That's what reconnaissance is all about.

Noel Tichy, in his work with Jack Welch at GE, fulfills the role of reconnaissance person. Noel's interviews with Welch about commitment at GE make real trouble for theorists of behavioral commitment. To his top people, Welch says essentially, If I'm paying you 200K I can damn well DEMAND full commitment to change. Research on behavioral commitment shows that people get committed to public, irrevocable, VOLITIONAL acts. Maybe Welch is able to get commitment because he keeps reminding people, look you don't have to stay here and take this. You can go somewhere else. If they stay, then they HAVE made a volitional act. Maybe, Welch gets differential commitment from his people, depending on whether or not they do feel a choice to go along with him. High choice = high commitment = Jack is the best CEO in the world. Low choice - low commitment - Jack stinks.

Or, consider Welch's manifesto: speed, simplicity, self-confidence. If you think about it, those three concepts are virtually a complete formula to create self-efficacy (Gist, 1987).

Each linkage I've suggested between Welch's actions and behavioral concepts may be silly. That's not as important as is the fact that the observations force theorists to think more precisely and reconnaissance people to look more carefully. As a person who is trying to develop a better understanding of commitment, I listen to Noel tell me how Welch constructs commitment in his world, just as I tell Noel things he should listen for that might have escaped him in previous conversations. I honestly don't want to sit for hours listening to Jack Welch talk anymore than Noel want to

sit back in Ann Arbor for hours pouring over the latest ins and outs of commitment theory. Both of our activities represent part of the vitality of the academy. But neither activity makes sense by itself. The meaning of each activity is constituted relationally, and each defines and is the pretext for the other. That's an old lesson, but it's also a complex lesson, that quickly gives way to the more soothing simplicities of listening to one's own kind.

If your goal is to once again become a division which is a haven for rebels, the job definition of what it means to be a rebel is surely not as simple or straightforward as it once was. Rebels of the 90s may be indignant about the growing list of "isms" (ageism, sexism, racism, classism), but they also confront a postmodern world of fractures, authentic pluralism, chastened rationalism and, as Meindl, Ehrlich, and Dukerich (1985) have shown so well, a tendency to handle the ill-structured problem of comprehending the causal structure of a complex system, by attributing its origins to leaders. As Evelyn Keller (1985, pp. 150-157) has shown in, of all things, research on the growth of slime molds, understanding of how those molds form was slowed for years because people kept looking for the guiding cell. In gendered discourse, outcomes always are treated as the outcome of hierarchies, intentions, guiding cells, leaders, pacemakers, and dominance. Emergent, self-organizing, accidental, cooperative arrangements, in which a little structure goes a long way, are under represented, partly because they are less dramatic and partly because they are not men's ways of knowing.

Fatigue of the spirit is hard to sustain in the face of provocations like that.

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## **INTERNATIONALIZING THE OD DIVISION**

*by Rupe Chisholm*

The Board of the Academy has created an International Program Committee. Ed Miller of the University of Michigan chairs the Committee that aims "to provide additional impetus for internationalization of the Academy."

Each division has selected a small task force to lead its effort and I agreed to coordinate our work. The pre-conference workshop of "Empowering Work-Action Research Network" members at the August meeting in San Francisco provided a chance to discuss several aspects of internationalization. Seven members from five countries met to begin to "scope" the issue and to brainstorm possible actions that would foster an open exchange of diverse ideas and experiences across national borders.

Issues that came up during our discussion and some views on them include:

What is internationalization?

- It's not a thing but a process of honestly and openly sharing knowledge, values, different ideologies, skills, and ourselves to achieve broader and deeper understanding.

- Since this is a never-ending quest, internationalizing seems to capture the essence of our work better than "internationalization."

- We're already doing it to some degree with our pre-conference workshops.

What are the Academy's goals for mounting this effort?

In the words of one Scandinavian colleague, "Is this a new American attempt at industrial colonization?" There is a danger of looking for marketing opportunities v. taking real contextual differences into account (combining professional skills and knowledge with understanding of local context).

"We must avoid setting up an international network that hides real national differences."

There is real excitement that stems from possibilities of linking with Eastern Europe, Asia, South America, and Africa.

What do we know about institutions, groups, and key individuals who are doing relevant work (OD, Action Research, Empowering Work, et al) in various countries?

How do we increasingly internationalize the OD Division? Can the Division (and do we want to) help catalyze a change process within the entire Academy?

Several actions that may contribute to sharing and appreciating the diversity that exists around the world were identified and discussed briefly. These include:

- o Organizing divisional and inter-divisional workshops, panels, papers, etc. to explore internationalizing.
- o Examining the criteria for selecting papers/symposia at the Academy meeting and rewarding sessions that include diverse, provocative ideologies.
- o Extending personal invitations to attend and participate in the 1991 Academy meeting in Miami to colleagues from parts of the world not currently represented (e.g. Latin America, Asia, Africa).
- o Identifying places to study outside home countries and providing places to stay, etc., in these locations.

- o Sharing information about examples of successful internationalizing efforts.
- o Holding meetings of interested colleagues outside the U.S.

These issues and possible actions are merely "starters." Our discussion time in San Francisco was brief (approximately 1 1/2 hours), and, the group that met was small. Hence, we need your thoughts and suggestions to include in the process of internationalizing the OD Division. Please send your ideas on:

- o Issues involved in internationalizing the OD Division
- o Possible strategies and action steps - Resources--key individuals, groups, centers, institutions
- o Any other thoughts that may be useful to:

Rupe Chisholm, Center for Quality of Work Life, The Pennsylvania State University at Harrisburg, Middletown, PA 17057, Phone: 717-948-6052, FAX: 717-948-6008

## **HOW TO ASSESS ORGANIZATION CULTURE: A RESPONSE TO SCHEIN**

*by Walt J. McCoy & Robert W. Tucker*

Edgar Schein has asserted in the summer OD Newsletter that organizational culture cannot be measured by questionnaire instruments. Aside from asserting a universal negative, Schein draws three provisional conclusions with which we disagree. Our disagreement comes primarily from our own empirical investigations into the cultures of United States organizations. Secondarily, however, we believe Schein makes conceptual claims about the nature of organizational culture which are philosophically and logically unsound, and which do not necessarily follow from even his own work.

Schein maintains that the dimensions of culture are not well defined, saying, "Basically I do not believe we have enough information about organizations to know what the relevant dimensions of their cultures are." (p. 4) We object on empirical grounds to being included among the "we" who don't have enough information. In our own field studies from 1985 to 1987 we worked closely with over 50 leaders and managers in a wide variety of organizations to

identify what, if any, dimensions of culture could be generalized across organizations. Our experiences led us in the opposite direction of Schein. We found many dimensions of culture for which there was a high degree of salience and relevance across nearly all of the organizations under study. The degree of congruence between the value bases for customer service and the value bases for employee service are one example of a nearly universal cultural issue in our experience. At the conclusion of our two year qualitative investigation, we operationalized about 30 of the dimensions of culture which looked most promising in terms of generalizability into an objective questionnaire. Since then various iterations of this instrument has been administered in over 100 middle and large size organizations, many of them in the Fortune 500 ranking. Depending on the level and nature of the criteria for scrutability, we found from 13 to 18 relatively stable and universal dimensions of culture having both salience and relevance for all of the organizations we have studied thus far.

Schein's second conclusion is that culture is inscrutable and unreportable by individuals; that individuals are not "sufficiently in touch" (p.4) with culture to report on it. Our own studies with leaders and managers clearly goes against the conclusion. We found that leaders and managers often had difficulty articulating their perceptions of the organization's culture in academically correct terms. But we found that virtually all successful leaders and managers understood their culture well. Perhaps more importantly, these leaders excelled in conforming to the implicit norms, canons of reasoning, and pre- and post-scriptions of their organization's culture. Schein's discussions of his observations about culture imply that he is more "in touch" with an organization's culture than the organization's employees. We simply found this belief to be false. If we excelled in any area of understanding when working within an organization, it was only in our ability to formalize the inherent cultural wisdom of the employees.

Schein's views on the inscrutability of culture also seem to be in conflict with his assertion that an organization's culture is learnable, reportable, and reachable. He defines culture as "...a pattern of basic assumptions...that has worked well enough to be considered valid and, therefore, to be taught to new members as the correct way to perceive, think, and feel..." (Schein, 1985, p.9) This definition appeals strongly to explicit, rather than tacit, dimensions of culture. Is it necessary for individuals to understand the deepest cultural assumptions and values to comment on behavioral regularities which might reflect a sound but inexplicit understanding of these assumptions and values? Our research suggests that understanding operates at many levels and that an employee's ability to formalize a cultural assumption is not a particularly useful indicator of his ability to understand and act on the assumption.

Schein's third assumption is that "...the notion that we can change them (cultural assumptions) is absolutely utopian at best."(p.4) Schein says that those of us who have empirically constructed culture instruments are "trivializing" and "perverting" OD. (p. 5) In contrast, it might be said that the assumption that culture can't be changed is the ultimate trivialization and perversion. Without the potential for change, OD has no reason to exist other than as a knowledge gathering activity. It is relatively easy to establish that the discipline of OD is intrinsically normative. Moreover, the phenomenal ground of culture is comprised of analytic truths and institutional facts; both of which are necessarily created by human social stipulation, and both of which are modifiable by human action. An organization's culture may be resistant to change. IN some cases it may even be intractable. But of logical necessity it must be mutable. In fact, Schein holds this view about his own work, since he goes on the share how he changes it.

We have put in years of work, using both ethnographic and statistical approaches to identifying, taxonomizing, measuring, and comparing organizational culture. With the direct guidance of dozens of successful leaders and managers, we have constructed an instrument (The Survey of Organizational Culture, Tucker-McCoy, 1988, 1989a, 1989b) which demonstrates at least reasonable levels of psychometric adequacy. Perhaps more important is the fact that the people who use it report that it is quite realistic and useful in their organizational decision making. We would be surprised if our instrument were the only one of its kind. We are more surprised to hear Schein's largely anecdotal assertion that it can't be done.

#### References:

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Annual Meeting, May 1991

The Eastern Academy of Management will hold its 28th Annual Meeting, May 16-18, 1991 at the Hartford Sheraton, Hartford, Connecticut. The theme for the conference is Empowerment--In the Workplace and in the Classroom. The Academy is soliciting papers and proposals for symposia, panels, exercises, cases and workshops for presentation at the annual meeting and publication in the annual Proceedings. Three best paper awards will be given. The Vice President of Program must be in receipt of all papers and proposals by December 1, 1990. For further information, contact: Dr. William P. Ferris, EAM Vice President, Program, Management Department, Western New England College, 1215 Wilbraham Road, Springfield, MA 01119, (413) 782-1505.

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