



*Promoting good practice
in the management and
support of aid personnel*

Develop Your People and Organisation

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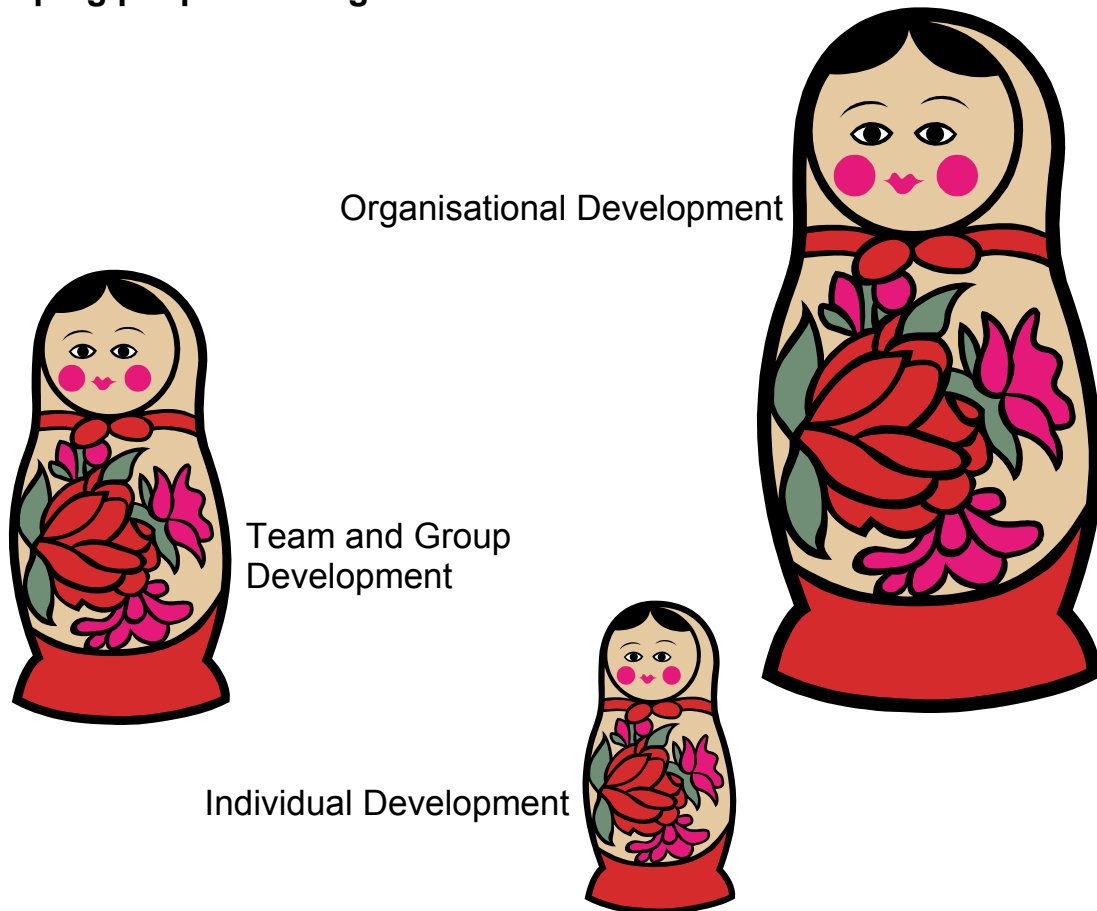
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Introduction

Developing people and organisations is like a set of Russian Dolls...



This Handbook is organised along these lines also – we start by looking at organisational development, move through team and group development, then finish with individual development.

Many of the sections are written to get you thinking about aspects of developing people in your own organisation and provide frameworks and models for application in your particular situation.

When you see this symbol:



there is an activity to help your reflection. You may choose to complete the activities on your own or with colleagues as a prompt for discussion and dialogue.

Definitions of Organisational Development

Organisational Development (OD) is often the most difficult for HR Professionals to understand and see their role in relation to. To get us started, here is one, composite, definition of OD:

“An holistic process of planned change and improvement to assist organisations in responding to their dynamic environment through the effective diagnosis and management of their structure, systems and culture”
-- *adapted from various sources*



There are not necessarily any easy definitions of OD to remember and use in conversations with managers in your organisation!

Which parts or phrases do you like?

What aspects of the above definition do you recognise as happening in your organisation?

Which words would stimulate insightful dialogue among your colleague managers?

Some critical Organisation Development activities

Effective Organisation Development should form an essential part of an organisation's strategic planning and implementation process, which will include a combination of both "hard" and "softer" activities:

| "Hard" activities | "Softer" activities |
|--|---|
| <ul style="list-style-type: none"> • Strong managerial leadership • Identification of strategic goals and long term direction – using techniques such as scenario planning • Evaluation of current organisational impact and performance in key areas – including identification of strengths and weaknesses and predictions for the future • Challenging existing practice to ensure continuous improvement • Identification of organisational capability gaps and how they might best be filled – including workforce planning • Remodelling of structures, systems and tasks • Allocating sufficient resources to support implementation – including making difficult choices about whether some existing operations should continue | <ul style="list-style-type: none"> • Consultation with stakeholders • Motivation of staff to ensure "buy in" – by ensuring they are aware of why the organisation needs to develop and keeping them involved in the change process • Identification of required shifts in culture and ethos • Identification and development of required behaviours, skills and knowledge |

What does an 'OD Practitioner' do?

In OD, practitioners might work in a manner similar to "organizational physicians" intending to improve the effectiveness of people and organizations by:

- 1) Establishing relationships with key personnel in the organization (often called "entering" and "contracting" with the organization);
- 2) Researching and evaluating systems in the organization to understand dysfunctions and/or goals of the systems in the organization ("diagnosing" the systems in the organization);
- 3) Identifying approaches (or "interventions") to improve effectiveness of the organization and its people;
- 4) Applying approaches to improve effectiveness (methods of "planned change" in the organization),
- 5) Evaluating the ongoing effectiveness of the approaches and their results.



Which of these activities do you get involved in?

How might you improve the impact of your organisation's development?

Who can help and support you in OD activities?

Some Organisational Development Strategies for System-Wide Change

Many OD programmes involve a wide range of varied interventions. There are some particular strategies that are directly designed to engage the whole organisational system in an interactive event. If budget and geography allow, they can be incredibly powerful and have tremendous impact in a concentrated way.

The next few pages look at these 'Whole-System' methods. You may decide to adopt a variation on the approaches, adapting and tailoring to meet your organisation's needs and constraints.

This table compares whole-system interactive events to the more traditional data collection and feedback methods which, as OD practitioners, we often get involved in.

| | <i>Traditional Data Collection and Feedback Methods</i> | <i>Whole-System Interactive Events</i> |
|--|---|---|
| <i>Theory Base Purpose</i> | Action Research Improved organisational effectiveness | Open Systems Theory Alignment around a strategic direction, work redesign, system-wide issues |
| <i>Data Base</i> | | |
| – <i>Source</i> | – Internal to organisation | – Organisation and external stakeholders |
| – <i>Availability</i> | – Limited to units | – Widely shared |
| <i>Responsibility and Accountability</i> | Driven by senior management | Broadly shared by senior management with whole system |
| <i>Time</i> | Slow: waterfall process by level | Fast: Rapid response to data |
| <i>Learning About</i> | Individual or unit functioning | The organisation as a system |
| <i>Consultant Role</i> | Central to: <ul style="list-style-type: none"> – Data collection – Data interpretation – Data feedback process | Structures and facilitates: <ul style="list-style-type: none"> – Data collection – Data analysis – Action taking |
| <i>Change Potential</i> | Sequential incremental change | Simultaneous fundamental change |

From: Large Group Interventions – Engaging the Whole System for Rapid Change. Barbara Benedict Bunker & Billie T Alban, Copyright 1997, Jossey-Bass. Reprinted by permission of John Wiley & Sons, Inc.

Within the broad heading 'Whole System Interactive Events', there are several particular methods for working with large groups. On the following pages you can see comparisons of methods for three purposes – creating the future, work design, and participative work.

Comparison: Large Group Methods for Creating the Future

THE SEARCH CONFERENCE
 Purpose: To Create a Future Vision
Merrelyn and Fred Emery

- Set Format: Environmental Scan, History, Present, Future
- Criteria for Participants: Within System Boundary
- Theory: Participative Democracy
- Search for Common Ground
- Rationalise Conflict
- No Experts
- Total Community Discussion
- 2.5 day minimum
- 35 to 40+ Participants
- Larger Groups = Multisearch Conference
- 1/3 Total Time is Action Planning

FUTURE SEARCH

Purpose: To Create a Future Vision
Weisbord and Janoff

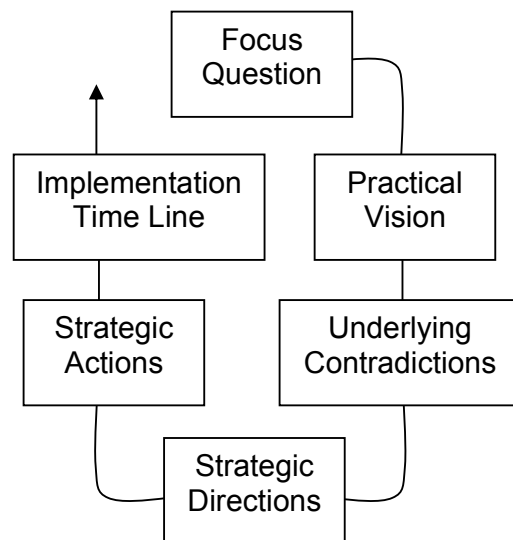
- Set Format: Past, present, Future, Action Planning
- Stakeholder Participation, No Experts
- Minimises Differences
- Search for Common Ground
- Self-Managed Small Groups
- 18 Hours over 3 Days
- 40 to 80+ Participants
- Larger Groups = Multisearch Conference

REAL TIME STRATEGIC CHANGE
 Purpose: To Create a Preferred Future with System-Wide Action Planning
Dannemiller and Jacobs

- Format Custom-Designed to Issue
- Highly Structured and Organised
- Theory: Beckhard Change Model
- Common Data Base
- 2 to 3 Days + Follow-Up Events
- Use of outside Experts as Appropriate
- Use of Small Groups and Total Community
- Self-Managed Small Groups
- 100 to 2,400 Participants
- Logistics Competence Critical
- Daily participant Feedback
- Planning Committee and Consultants Design Events

ICA STRATEGIC PLANNING PROCESS

Purpose: Strategic Planning



- Stakeholder Participation
- 2 to 7 Days
- 50 to 200 Participants
- Planning Committee and Consultants Design Events

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Comparison: Large Group Methods for Work Design

THE CONFERENCE MODEL®

Dick and Emily Axelrod

- System-Wide Preconference Education
- Design Process in Five Conferences
 - ◊ Vision
 - ◊ Customer
 - ◊ Technical
 - ◊ Design
 - ◊ Implementation
- Three + Weeks Between Conferences
- 2+ Days for Each Conference
- Data Assist Teams Work Between Meetings to Involve Larger Organisation
- 80+ Participants, Parallel Conferences for Larger Groups

FAST CYCLE FULL PARTICIPATION WORK DESIGN

Pasmore, Fitz And Frank

- Orientation Events Educate and include Everyone
- Five Meetings
 - ◊ Future Search (2 days)
 - ◊ Meeting External Expectations (1 day)
 - ◊ Work Systems Analysis (2 to 3 days)
 - ◊ Work Life Analysis (1 day)
 - ◊ New Design and Implementation (4+ days)
- Up to 120 Attend Meetings
- Parallel Design of Support Process Changes
- 1/3 of System Participation Goal
- Design Ratification Events Include Everyone

REAL TIME WORK DESIGN

Dannemiller and Tolchinsky

- Whole System present at Launch and Implementation
- 50 to 2,400 Participants
- Process, Design, Deep Dive Conferences Representative
- 1-Day Conferences on Key Administrative Support Issues
- Design Team Manages Process and Does Micro-Work
- Implementation Team Oversees Mini-Conferences

PARTICIPATIVE DESIGN

Fred and Merrelyn Emery

- Bottom-Up Process
- Company-Wide Education is First Step
- Management Sets Minimum Critical Specifications
- Basic Principle: Each Level Coordinates and Controls Its Own Work
- Six Design principles Used to Redesign Work
- Multiskilling Is the Norm

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Comparison: Large Group Methods for Whole-System Participative Work

SIMU-REAL

Purpose: Real-Time Work on Current Issues, Test Future Designs, Learn About System

Donald and Alan Klein

- Organization Selects Issue for Work
- Room Arrangement Reflects Organization's Structure
- People Act Their Organizational Role
- Periods of Stop Action and Reflection
- Decision Process Agreed to in Advance
- 1 Day
- 50 to 150 People
- Facilitator Needs Expertise in Process Consultation

WORK-OUT (GENERAL ELECTRIC)

Purpose: Problem Identification and Process Improvement

- Improvement Target Selected
- Employee Cross-Functional Meeting
- Process: Discuss and Recommend
- Senior Management Responds Immediately
- Champions and Sponsors Follow Through to Implementation
- Follow-Up as Needed
- 1 to 2 Days

LARGE SCALE INTERACTIVE EVENTS

Purpose: Problem Solving
Dannemiller and Jacobs

Uses Same Methodology as Real Time Strategic Change (see description, page 6)

- Many Different Uses

OPEN SPACE TECHNOLOGY

Purpose: Discussion and Exploration of System Issues
Harrison Owen

- Least Structured of Large Group Technologies
- Divergent process
- Large Group Creates Agenda Topics
- Interest Groups Form Around Topics
- Periodic Town Meetings for Sharing Information Across Interest Groups
- One Facilitator Lays Out Format, Ground Rules, "Holds the Space"
- Requires an Understanding of Large Group Dynamics
- 1 to 3 Days

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What are the advantages and disadvantages of the various large group methods of OD in the context of your organisation?

| Advantages | Disadvantages |
|------------|---------------|
| | |

Team and Group Development

It is important to distinguish between teams and groups in organisations because methods for developing a team are different to the methods for developing a group. When analysing training and development needs you need to ask questions to ascertain whether a particular team (or perhaps several teams) need a development intervention designing for them, or the need exists in more than individual, and that collection of individuals with similar training/development need make up a group.

The difference between teams and groups ...



Team Development

Focus:

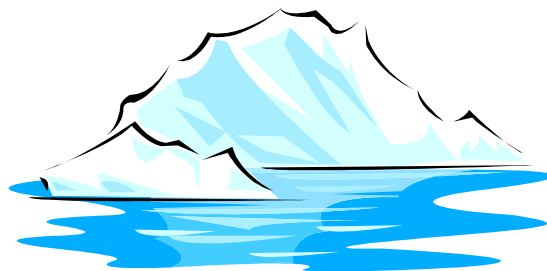
- Team goals, vision, values
- Behaviours in the team
- Team systems and structures
- Facilitating through blockages to progress of team's maturity

Team Development often requires facilitation so that the team leader can fully participate (the team leader, as part of the 'system' of the team, is part of any problems or issues, so probably has as much learning to do as the rest of the team).

Most team meetings concentrate on tasks and progress with projects – WHAT is being done?

Team development encourages the team to pay attention to dynamics, processes and procedures – HOW the work is being done.

Effective team development sensitively exposes the submerged aspects of the team – like the submerged parts of an iceberg.



Group Development

Development in groups is carried out because:

- The number of individuals with a particular development need make it more cost-effective than 1 to 1 interventions
- Interaction with colleagues will deepen understanding and skills
- The learning need includes interpersonal skills best learned and practiced in a group situation
- Group development methods will provide the speed or critical mass needed for significant change through the organisation

Action Learning

One particular method of group development (which often also has an impact on the organisation's development) is Action Learning. This approach has learning sets of five or six managers who meet on a regular basis to help each other work on and learn from real problems they face in their work.

Reg Revans, the originator of Action Learning, came up with a couple of equations to explain the relationship of learning to change, and the place of 'questioning insight', which Action Learning rests upon:

"Organisations (and the individuals in them) cannot flourish unless their rate of learning (L) is equal to or greater than, the rate of change (C) being experienced: **$L \geq C$** "

and

"Learning has two elements – traditional instruction or **programmed knowledge**, and critical reflection or **questioning insight**. This gives the learning equation:

$$L = P + Q$$

(Reproduced with permission from "Action Learning for Managers", by Mike Pedler – published by Lemos & Crane, London, 1996)

Reg Revans also made a very useful distinction between what he labelled puzzles and problems:

- **Puzzles have 'best' solutions and can be solved via the application of programmed knowledge with the help of experts**
- **Problems have no right answers and are tackled by people in different ways by the exercise of questioning insight**



When might the various group training and development interventions be most and least effective in your organisation?

| | <i>Most Effective when ...</i> | <i>Least Effective when ...</i> |
|-----------------|--------------------------------|---------------------------------|
| Action Learning | | |
| Workshops | | |
| Conferences | | |
| Courses | | |
| Seminars | | |
| ... | | |
| | | |
| | | |

Individual Development

When designing individual development, it is more possible to respond to particular individual's preferences and needs.

Some preferences that could be accounted for are:

- Learning styles (Honey & Mumford or Kolb)
- Interaction and Thinking styles (Myers Briggs Type Indicator and Firo B)
- Pace for moving around the Learning Cycle
- Communication preferences (Visual, auditory, kinaesthetic)
- Multiple Intelligences (Gardner)
- Meta programmes (Neuro Linguistic Programming)
- Drivers (Transactional Analysis)

If individual development is being carried out on a 'mass' basis (e.g. distance learning materials, e-learning courses, CD-ROM packages), variety should be built in to ensure a range of preferences are catered for. If learning packages are supplied off-the-shelf, one criteria for selection should be variety for different preferences – "you can't please all the people all the time, but you can please all the people some of the time".

Bear in mind the high degree of self-motivation needed for individual development methods to be effective – most learners need some kind of blend with other methods in order to keep motivation and momentum up.

Two individual development approaches that are widely used in organisations are coaching and mentoring. Many people get confused between the two approaches – as a general guide, coaching tends to concentrate on a specific learning need the individual has, and the coach may be chosen because of their experience or expertise in that specific area of knowledge or skill. Mentoring has a looser brief and often can be as much about an individual's career development as specific skill development. Mentors are usually more experienced and more senior than the 'mentee'. Both a coach and a mentor may be drawn from outside the organisation if there are not the relevant capabilities within.

The next few pages examine coaching and mentoring in a little more depth.

Coaching - Some Prior Conditions

Before coaching can be successful, certain conditions need to be present – these will require the organisational culture, policies and practices to be supportive of coaching:

1. The process of coaching is likely to be centred on the superior/subordinate relationship in normal events. Thus the *quality* of that relationship is a vital factor which may be influenced by a number of issues.
2. One of these issues is the general atmosphere within an organisation - what kind of technology, market conditions, degree of change and climate of human relations exist?
3. Another condition, probably essential, is that the subordinate must have a genuine respect for the superior, certainly in terms of competence and possibly as a person too.
4. On the other side it is often argued that a superior must have a measure of respect for, or confidence in, the subordinate to enable the latter to be trusted to "fly solo" in some of the responsibilities - this way he/she will learn by feeling responsible.
5. The preferred management style of the superior is an important issue. A sudden change in style to serve the needs of coaching may not be convincing and may not even be desirable in the circumstances of the particular staff and work tasks.
6. Some writers assert that the superior must be committed to learning him/herself through coaching others, i.e. a learning environment is created in which either person or both can learn from discussion of work assignments. The concept of a "learning group" may be useful.
7. A willingness to devote time to the coaching process is an essential condition. Coaching needs to be seen as a normal part of day-to-day work - not an intrusion. Actually it may gradually save time as confidence and competence develop through the learning.
8. Perhaps the most important prior condition is a recognition by both parties (and other people surrounding them) that learning is a respectable activity. The implications are that it is expected that people don't start by being experts at everything, new tasks won't be handled in an ideal way the first time and that everyone will gain when calculated risks are taken by individuals under guidance as part of coached learning.

Development of Coaching Skills - some possible stages in detail

If managers in your organisation do not already have the skills needed in order to be an effective coach, you will need to establish ways in which the skills can be developed:

1. Establish the boss-subordinate relationship in preparation for subsequent coaching:
 - preferred styles of both parties - mutual respect
 - taking time to build up a rapport
 - common understanding of areas of work

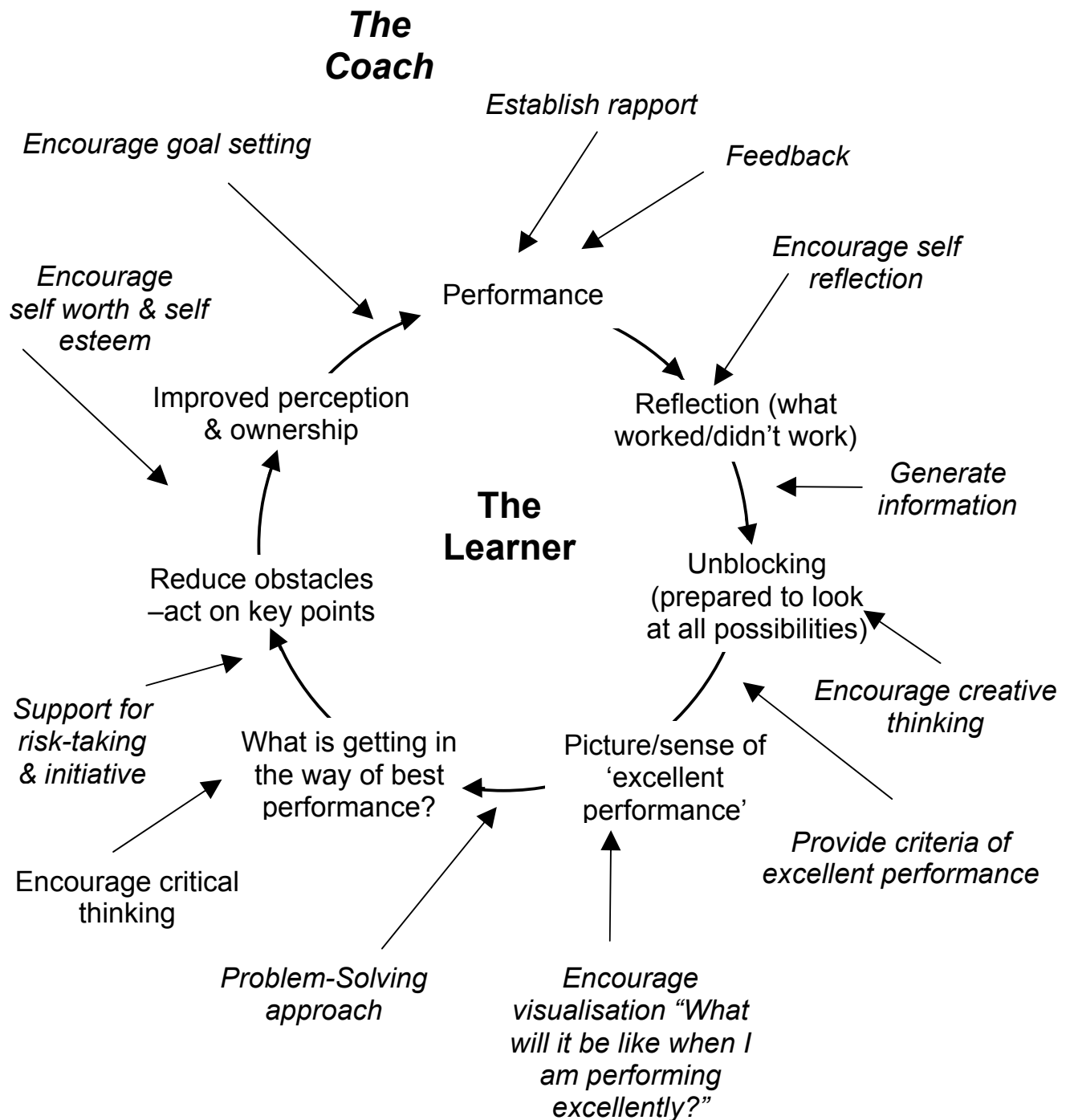
2. Clarify the objectives of the organisation and of the manpower philosophy/appraisal system/career policy:
 - predominant style from the top - business strategy
 - manpower policy (explicit or implicit) - short-term priorities
 - the reality of the appraisal system

3. Develop skills of interviewing and flexibility of style:
 - preparation on both sides - opening phase and tone
 - ensuring full participation of interviewee
 - ability to range from non-directive to directive - summarising and follow-up

4. Work towards joint goal-setting:
 - trying to obtain suggestions to use - listening to ideas and using them - offering a reasonable bargain - building on common ground

5. Making it specific and planning to achieve it:
 - use of targets (quantity, quality and time-scale) - recording it in writing by both parties - follow-up

In a coaching relationship, the learner typically follows a cycle of activity, which leads to their learning. The coach feeds into this cycle through various approaches and methods – different ones being needed at different stages of the learner’s cycle:



Ground Rules for Mentoring

For mentoring to be successful, the two parties need to establish their ground rules early on in the mentoring relationship. This ensures there are minimal misunderstandings and dangerous assumptions, which may cause difficulties later in the relationship. Here are some suggested ground rules, based on typical ground rules that have been used in the past in mentoring relationships:

1. The details of discussions between mentor and manager are confidential. However, by agreement, issues may be taken outside the meeting where the action of others is needed on the issue.
2. This implies that both sides will be as honest and open as possible. Don't pretend things aren't the way they are. How can you avoid defensive game playing?
3. The mentor and manager should refer to an agreed checklist to agree what will and will not be covered in the mentoring relationship.
4. Agree when to meet - how often, for how long, over what period - and review this regularly.
5. Agree where to meet - ideally on neutral territory where there will be no interruptions during a meeting.
6. Agree if there will be informal contact between formal meetings e.g. phone calls.
7. Agree a way of involving/keeping informed other relevant people e.g. the manager's boss. Agree any relationship between the mentoring process and any formal performance review/appraisal system e.g. will any information from the mentoring process be fed into an appraisal?
8. Discussion of the manager's personal life only occurs at the invitation of the manager (if at all).
9. The mentor will not make excessive demands on the manager's time (agree what this means in practice).
10. The manager will not make excessive demands on the mentor's time (agree what this means in practice).
11. The manager will only use the mentor's authority/name with the mentor's consent.
12. The manager is in the driving seat: the mentor's job is to assist the manager.
13. The mentor will only communicate the existence of the relationship to those people who the manager agrees should know of it.

Useful Skills and Behaviours for Mentors

When developing skills as a mentor, there are several key aspects to focus attention on:

1. Ask open-ended questions

("How?" "Why?" "How do you feel about ...?")

2. Summarise

(This will give you the opportunity to check that you have heard accurately, and the person being mentored the opportunity to see more of the total situation).

3. Ask the manager to summarise

(This will help to clarify both for you and the person being mentored and may clear the way for future action. It will also check that you understand each other).

4. Clarify

(e.g. "There seem to be several things that are concerning you" then go on to describe them as you have heard them).

5. Reflect back

(e.g. "So, as I see it, what you are saying is ...").

6. Notice differences between verbal and non-verbal behaviour

("I notice that although you say you have decided what you want to do you are still looking a bit uncertain").

7. Always ask if there is anything else the person being mentored wants to say or ask at the end of an interview; while always maintaining a clear mutual time frame.

A Decision-Making Matrix

When making a complex decision about development methods for a particular need in your organisation, use this matrix as a template to help in recognising the choices available and important decision criteria.

| <i>Criteria</i> \ <i>Method</i> | Learning Sets | Self-paced workbooks | Mentoring | Conference | |
|---------------------------------|---------------|----------------------|-----------|------------|--|
| Cost | | | | | |
| Technology needed/available | | | | | |
| Available expertise | | | | | |
| Scale of need | | | | | |
| Senior management buy-in | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |

Putting it all Together

In designing or commissioning any development intervention, address all stages of the Learning Cycle – ‘ADDIE’:

Analysis:
diagnosing the learning, development and training needs – at organisational, team/group, and individual level. What is needed?

Design:
putting together a robust programme or intervention that will meet the needs.
What will meet the needs most effectively?

Development:
creating the materials, notes and learner resources for use in implementation. How do the materials need to look, and what do they need to include, for the learning to be fully supported??

Implementation:
Carrying out the training, development or learning intervention. Who is best placed to help? How can they be trained and supported for their role?

Evaluation:
Measuring the impact of the intervention. What difference has it made?

Reading and References

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