How Does Training Fit into OD or Is It the Opposite?

Written By Alan Landers

The purpose of this article is to articulate my thoughts on the differences, and similarities between OD and L&D. I've found that many people confuse the two. For example, there are trainers who feel they are doing OD. OD practitioners who do training, and HR people who do both + HR. In truth, there is a lot of overlap, but in my opinion, they are different disciplines.

Brief History and Definitions of Organization Development

I think it is beneficial to know what things were like when the field of organization development began. Valerie Garrow provides a good overview. The following is edited from the first two sections of her article: *OD: past, present and future.* (http://tinyurl.com/jw6e7ls).

> *World War II ended in September 1945. The dominating management theory of the time was "scientific management" where workers were seen as small cogs in the machinery of organizational bureaucracies. Workers had no autonomy and easily dismissed if there was any dissent. OD was a post-war response to the dehumanizing practices of that theory. It desired to replace the machine metaphor with a more humanistic approach with new, value-driven concepts such as: respect for human dignity; integrity; freedom; justice and responsibility. OD practitioners suggested that people, systems and technology could be organized in a more effective and humane ways. Rising post-war social aspirations provided fertile ground for these new values as well as OD's second important legacy: training and development.*

The Early Beginnings

Kurt Lewin is generally acknowledged as the father of OD. He originated the ideas of group dynamics, leadership styles, force field theory, 3-Step Change Model, T-groups, action research and other key underpinnings of the field. But, he was not alone in founding the discipline of OD. Chris Argyris, Richard Beckard, Edgar Schein, Warren Bennis, and many, many others played important roles in OD's development.

In the mid-'40s, Lewin, John Collier, and William Whyte contended that research had to be closely linked to actions, if organizations were to become more effective through change programs. Argyris and others also stressed the importance of using research to solve practical problems. He coined the concept of action science. Today, several variations of action research are still being applied.

Rensis Likert was a contemporary of Lewin. Lewin and his team of researchers formed the Survey Research Center which later became the Institute for Social Research. Likert's contributions to OD

are significant. The two most noted are: Likert Scales which allowed psychometricians to systematically collect research data on "soft skills" and attitudes. This proved to be a boon to practitioners of action research. His scales made it possible to quantify the results of all the work various theorists had been doing with group dynamics. They also are used to determine the effectiveness of OD interventions through to use of periodically repeated organization assessments. His second contribution to OD and social sciences was developing "open-ended interviewing" and "funneling" techniques. These are still in use today.

Lewin, with colleagues from MIT, founded the National Training Laboratories (NTL) which led to T-groups and group-based OD in 1947. 1951 saw the emergence of the Tavistock Institute, in the UK, and socio-technical systems thinking. Socio-tech addresses the connection between social factors and technological issues (such as organization structure, organization design, job families, etc.) and how their interactions influence organization effectiveness, efficiency, and morale. Tavistocks's contributions to OD focus on the study of social/psychological interactions between groups and individuals. Among the people influencing OD at the Tavistock Institute were Eric Trist, Fred Emery, Wilford Bion, John Rawlings Rees and Mary Luff among many others.

In the mid-fifties, Douglas McGregor and Richard Beckhard coined the term "organization development" to describe the bottoms-up change effort they were doing that didn't fit within traditional consulting categories of the time.

"The 1960s were heady times for organizational behavior [and OD]", according to L. David Brown (*Research Actions in Many Worlds,* Journal of Applied Behavioral Science. 1989). The "Human Potential Movement," had fully emerged. There was "widespread enthusiasm for 'encounter groups' and 'personal growth laboratories.'

In 1969, the commonly accepted and "classic" definition of organization development was put forth by Richard Beckhard in his book, *Organization Development: Strategies and Models* (Addison-Wesley, 1969, p. 9)*. The definition is still popular today and is the definition used by OD Network. It is:

> *"Organization Development is an effort planned, organization-wide, and managed from the top, to increase organization effectiveness and health through planned interventions in the organization's 'processes,' using behavioral-science knowledge."*

OD interventions in the '70s were characterized by organization diagnoses/assessments, and planned change interventions designed to improve organization effectiveness. Among the interventions were T-groups, unstructured group laboratories, and improved action learning processes. These advances helped practitioners better understand leadership effectiveness, group dynamics, and other factors influencing organization, team, and individual effectiveness.

As the popularity of T-Groups grew, trainers and consultants started using their facilitative methodologies to conduct experiential learning activities. Trainers adopted these activities and they

morphed into "games trainers play." Most contemporary facilitation techniques are based on the techniques and practices involved in leading T-groups.

In 1974, diagnosis and planning became more important, as practitioners felt pressure to provide demonstrable, quantifiable results of their organizational change efforts. This methodology was spearheaded by Frank Friedlander and L. Dave Brown. They developed two types of OD "target interventions": 1) people interventions (having to do with organizational processes), and 2) technology interventions (having to do with structures, organization design, job design, etc.). They also began articulating the influence of the environment as it impacts organizations and the people in them.

During the '80s, OD practitioners began examining the link between organizational culture and organization performance. General systems theory, organization effectiveness, and complexity theory all made their contributions to the practice of OD.

In 2005, David Bradford and Warner Burke came up with a new definition of OD that was more consistent with the need to cope with rapidly changing environments and their impact on organizations.

> *Based on (1) a set of values, largely humanistic; (2) application of the behavioral sciences; and (3) open systems theory, organization development is a systemwide process of planned change aimed toward improving organization effectiveness by way of enhanced congruence of such key organizational dimensions as external environment, mission, strategy, leadership, culture, structure, information and reward systems, and work policies and procedures.*

More recently, Donald Anderson (*Organization Development: The process of leading organizational change*, 2015, Sage Publications, P. 3) offered a less complicated definition:

> *Organization Development is the process of increasing organizational effectiveness and facilitation personal and organizational change through the use of interventions driven by social and behavioral science knowledge.*

I prefer this definition. But if you don't, please read this article by T. Marshall Egan, *Organization Development: An Examination of Definitions and Dependent Variables* (2001 Conference Proceedings of the Academy of Human Resource Development, pp 396-402) (http://tinyurl.com/lbk69fd). He studied 27 definitions of OD which included some 60 different variables. I'm sure there will be one that you may like.

Two Additional Movements

Four central themes emerged in the practice of OD in its early years: 1) concern for social development and social justice, 2) the combination of research and action which provided new ways of understanding social systems, 3) working at the "social and technical interfaces" of different groups,

organizations, and cultures, and 4) the advancement of social analysis techniques and processes. (L. David Brown, 1989)

By 1989, when I began doing OD consulting independently, all of these themes had coalesced. Up to that time, I had been doing work in the fields of training and OD for eleven years, the last five of which were primarily involved with OD consulting. I had personally experienced the emergence of many of these movements.

About the same time, another movement surfaced in in the U.S. Total Quality Management and the Malcolm Baldridge Award had a significant impact on measurement and effectiveness. Organizations sought "continuous process improvement," using six-sigma quality techniques and tools. Sustainability, and employee empowerment surfaced as major goals within large organizations.

The concept of continuous process improvement also influenced the field of learning and development. In 1990, Peter Senge published *The Fifth Discipline* and the concept of a "learning organization." It became popular as organizations sought to facilitate learning among their employees to better cope with continuous change and transformations. The learning organization had five characteristics: 1) systems thinking, 2) personal mastery, 3) mental models, 4) shared vision, and 5) team learning. By implementing these practices, organizations were connected by employee communities and thus, more committed to each other and organizational goals.

OD as Practiced

All of this history had a profound impact on how I practiced OD. When I was a consultant with University Associates, I was mentored by Bill Pfeiffer, co-founder of the firm. UA published hundreds of books on OD and training by thought leaders in fields. Their workshops were delivered in major cities from Europe to Asia and throughout North America. Bill taught me how to plan and implement OD interventions. Like most practitioners at the time, my work was heavily influenced by the UA thought leaders, as well as Peter Block, John Kotter, William Bridges, Jon Katzenbach, Douglas Smith, Jim Collins, and Ricardo Semler.

After initial contracting and establishing overarching goals, I started an OD intervention with an organization assessment, conducted sensing interviews, observed people doing their jobs, reviewed records and performance data, designed and administered surveys. Then, armed with data, I prepared a change management/implementation plan.

A typical plan involved group work, intended to help teams develop core teaming skills such as group decision-making, conflict resolution, consensus building, etc. A battery of assessment instruments was used to determine communication styles, leadership styles, assertiveness styles, etc. Interventions were based on the data and typically included workshops to teach skills, some sort of learning database for reference, coaching sessions (usually for senior managers), teambuilding sessions to help teams be

more effective, and a process for reoccurring assessments of key performance measures. Curriculum development and training-for-trainers were common components of an OD intervention.

On the process side of an intervention, I'd work with HR to conduct job-task analyses, assess performance management systems, selection and retention strategies, and develop competency maps for most, if not all jobs. We'd also look at workflow and work processes to see if there were opportunities to increase efficiency and reduce wastage. These were things I could do, but typically I would bring in specialists to assist and find in-house experts with whom to work. The two most important goals I worked toward was improving organization effectiveness and ensuring the organization would be capable of continuing the work without me.

In the '90s, employee empowerment and self-direction became important and that was my primary consulting focus. One of my typical consulting gigs lasted 12-months to 18-months. It would take that long to start the project, generate momentum, and begin to see changes. But, to be effective and have a long-term positive impact, the interventions had to have a longitudinal component. There had to be a way of continuing the work when my part of the work was done.

Toward that end, I established a Planning and Implementation Team (PIT) comprised of executives, managers/supervisors, and employees from within the organization, to help lead change from within. I spent a lot of time working with them to ensure they understood the goals, processes, and principles behind the intervention. The PIT became the body which carried on the work we started.

In my mind, this is OD work.

Where the Confusion Emerged

The process for helping people become better communicators, problem-solvers, and more collaborative, etc., typically involved some sort of "people-skills" or "soft-skills" training that took place in T-groups or similar settings. (You can find a list of 87 soft skills at www.training.simplicable .com/training/new/87-soft-skills.) OD practitioners learned how to design and deliver these courses, eventually becoming skilled facilitator-trainers.

Most trainers haven't studied organizational theories, group theories, action research, appreciative inquiry, systems theory, social theories, etc. They have a solid background in L&D theories, but OD theories are typically outside of their educational background and experience. On the other hand, I doubt many OD practitioners understand eLearning theories. ADDIE, ARCS, Learner-Centered Design, Multimodality, Game-Reward Systems, etc. The intricacies of learning management systems, SCORM, xAPI, and micro-learning are beyond their expertise as well. The point is that these are two distinct disciplines. Practitioners of both may know a bit about the other but, typically, are not, in my opinion, experts outside of their own discipline.

Similarities and Differences

Both OD and Training seek to deliver competitive advantage. OD practitioners do it by creating more effective organizations and processes. L&D does it by improving knowledge and skills. Both, attempt to positively influence organizational behavior and attitudes, using their own techniques or borrowing from the other's.

OD and Training share a common goal in improving leadership skills. Assessments, coaching, mentoring, and training are techniques shared by both.

OD practitioners design and implement "interventions" that look at large-scale change, changing processes, environments, social systems, cultures, etc. These are typically systemwide, one-on-one sessions or small group sessions, perhaps teambuilding sessions that address specific social interaction issues. Some trainers do this, also. But, many may not be as highly skilled in designing and leading these sessions as are OD practitioners.

Training professionals develop "content," "programs," or "courses" to build skills and knowledge. As these increase, L&D professionals become curators of instructional content. L&D seeks to provide learning opportunities through a variety of delivery modalities: eLearning and electronic performance support systems delivering micro-learning to employees whenever and wherever needed. MOOCs and other online learning opportunities are provided via technology-driven delivery systems. Tracking training data is vitally important to L&D as it tries to establish its seat at the C-level. New technology like xAPI are making that possible.

Conclusion

Bottom line, both OD & L&D seek to improve core competencies and attain competitive advantage for their organizations. They approach their work in different ways but may use some of the processes of the other. OD can be conceptualized as being within the realms of organizational psychology, sociology, or anthropology. L&D is within the realm of learning and brain theories.

I find it difficult to imagine someone planning and leading an effective organizational change intervention without a deep understanding of change, organizations, and group theories. Similarly, I find it not to terribly likely an OD practitioner can develop an effective organizational learning strategy without a deep understanding of the theories that apply to it. I do not believe that a one-semester course in OD is sufficient to become good at it. Nor do I believe that people can create effective learning without a deep understanding of learning and design theories.

The two disciplines are different. This article lists just a few of them.