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[These remarks were prepared for the Organization Design Forum, April 15, 2005, in San Francisco. They are based on themes from *Productive Workplaces Revisited: Dignity Meaning and Community in the 21st Century* (Jossey-Bass/Wylie, 2004).

Techniques to Match to Our Values

By Marvin Weisbord

Here's the way it was in 1969 when I became a consultant: NO cell phones, NO pagers, NO fax machines; NO personal computers, NO PowerPoint, NO CD's, NO DVD's, NO internet. My "personal digital assistant" was a little black book in which I wrote down dates in pencil. Blackberries were something you put on pancakes. The Sony Walkman would not be invented for 10 years. Airplanes could go 500 miles an hour, and the schedule from Philadelphia to Boston was 50 minutes. Today airplanes still go 500 miles an hour and the same trip takes an hour and half.

But that's a different speech.

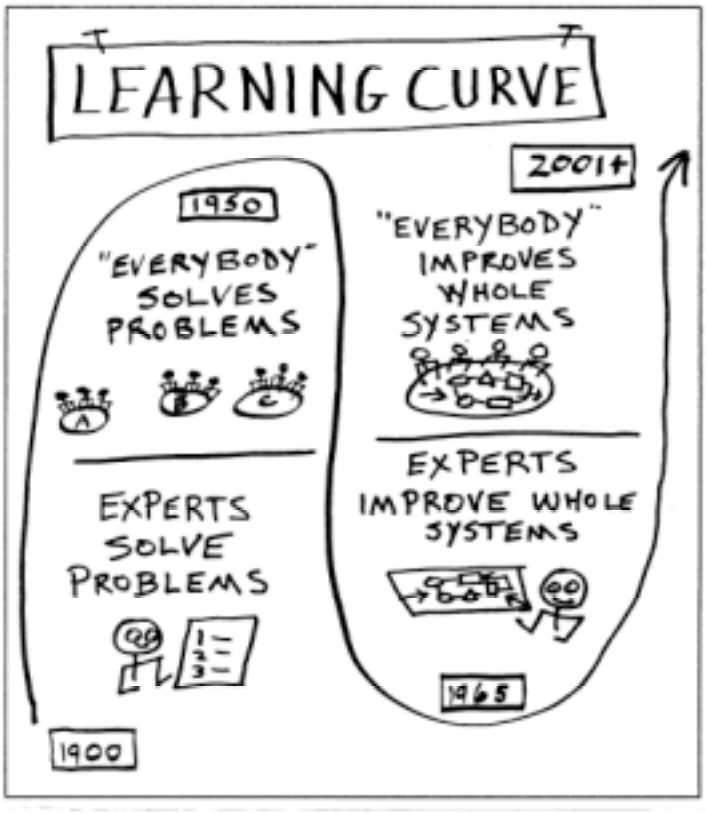
You have may have noticed that things are changing fast. That is not a new observation. More than 40 years ago a mentor of mine, Eric Trist, and his key collaborator, Fred Emery, wrote a ground-breaking paper describing how outside events interacted to produce conditions that organizations could neither control nor ignore. "The Causal Texture of Organizational Environments" is the title. It's a pretty dense paper, but suffice to say they identified conditions from calm to turbulent that called for different responses. What none of us fully appreciated in those years was that the *velocity* of environmental change was accelerating at warp speed.

In 1969 I went to see Paul Lawrence at Harvard Business School. Paul was co-author with Jay Lorsch of *Organization and Environment,* surely one of the great organization design books. I had been applying Paul's ideas to planning in a medical school. One thing led to another and eventually we teamed up to repeat his research in nine academic medical centers, creating some new ideas about managing them.

At Harvard 36 years ago it was said that organizations reorganized every seven years. Those that were centralized, decentralized. Those that were decentralized, centralized. If they were in aerospace, they had a matrix, and people kept fiddling with it but never quite got it right. That seven year cycle got to be five years in the early 70's, and then three years, and by the 80's reorganizations were as predictable as the seasons. Mergers, acquisitions, down-sizings, globalizings, right-sizings. The org charts had hardly come out of the copy machine before they had to be changed again.

By the time I quit consulting in 1992, the cycle was more like seven weeks, or maybe seven days. Everybody knew that if they had a steep hierarchy what they needed was a flat, lean, mean machine. Yet, few organizations stood still long enough to go on a steady diet that would keep them healthy and slim. We had no choice but to celebrate change, but what became of the stable old cultures that needed a lot prodding to be unfrozen, moved, and refrozen again at some elusive higher level of functioning?

The Learning Curve



In 1987 I wrote a book, *Productive Workplaces,* tracing my workplace consulting ancestry back 100 years to Frederick Taylor, "the father of scientific management." I imagined a "learning curve," starting in the 19th Century with EXPERTS SOLVING PROBLEMS--what came to be called "Taylorism." The 1950's, brought new insights into group dynamics, leading to the second point on my curve: EVERYBODY SOLVING PROBLEMS. Only a decade later organization designers started to catch on to biologist Ludwig von Bertalanffy's paradigm-shifting concept, general systems theory. His prose is not an easy read, but I can give you a one-sentence book review:

Everything is hooked up to everything else!

This concept made possible previously unthinkable practices for improving workplaces, taking into account everything Taylor knew and a lot of things he never thought of, like "environmental demands," "negative entropy," and "equifinality."

EXPERTS IMPROVING WHOLE SYSTEMS added significant sophistication to the practice of participative management, putting economics and technology right back up there with human relations. In a few minutes I will take up the fourth milestone on my curve--GETTING EVERYBODY IMPROVING WHOLE SYSTEMS. First, I want to tell you some my experiences with the first three milestones to illustrate the point of my talk. We are always at risk to leave our values in the attic when we fall in love with great-looking new techniques.

"Taylorism"

Frederick Taylor described himself in 1893 as the world's first "consulting engineer. " He institutionalized outside expertise to the point where just as fish do not know they swim in water, we can miss the way fragmented work systems impact our lives—in stores, restaurants, offices, and even our homes, from whence we try to connect via mindless phone answering loops to what is euphemistically called "the service economy." Taylorism persists also in "electronic sweatshops," where your own computer, recognizing no priorities, can impartially supervise both your productivity and your potty breaks.

My interest in Taylorism is more than academic. Taylor was an upper-class Philadelphia Quaker. And I grew up as a lower middle-class Philadelphia row house kid, whose father nonetheless worked many years for a Quaker-owned firm. In addition to $30 a week, he brought home large doses of Quaker values—notably modesty, thrift, personal integrity, hard work, egalitarianism, and sympathy for the underdog.

But that is not the only Taylor hook in me. I also had once followed in his footsteps. In 1981 I became a consultant to the Bethlehem Steel Corporation where Taylor consulted full-time from 1898 until he was thrown out in 1901, but not before making Bethlehem's operations among the most efficient in the world. Taylor had an implementation contract that many of us would envy: if anyone resisted his systems he could have them fired.

In spite of this—or maybe because of it--he had great success improving output, quality, and working conditions in factories. He integrated cost accounting, training, personnel records, inventory control, goal setting, feedback, wage incentives and other methods to achieve enviable results. Taylor's values were quite contemporary. His magnum opus, *The Principles of Scientific Management* (1911), far from an engineering treatise, may have been the first ever human resources textbook,

"We can see our forests vanishing," Taylor wrote, "our water-powers going to waste, our soil being carried by floods into the sea; and the end of our coal and our iron is in sight. But our larger wastes of human effort, which go on every day through such of our acts as are blundering, ill-directed , or inefficient…are less visible, less tangible…" He was writing of course of the waste of what Rensis Likert many years later would call "human capital."

Taylor's "principles" are so simple as to be laughable:

--science, not rule of thumb:

--harmony, not discord;

--cooperation, not individualism;

--maximum output, not restricted output;

--development of all workers to their "greatest efficiency and prosperity."

Taylor asserted that his principles fit every form of human activity, and that "whenever these principles are correctly applied, results must follow which are truly astounding" (a claim with a very contemporary ring if your tool kit happens to include Open Space Technology, Appreciative Inquiry, or, for that matter, Future Search).

I have learned a great deal from Taylor about the choices facing organization designers. He always insisted that his practice had nothing to do with techniques. Rather, it was "a complete mental revolution" in the relations among working people. Indeed, he practiced a form of action research—experimenting with workers to find the one best way to do every job and the best person to do it. Like Abraham Maslow decades later, he theorized that people used only a tiny part of their capabilities at work. If everybody worked at the jobs they did best and were paid incentive bonuses for individual output, all would earn superior wages. Brought up as a pacifist, Taylor believed to his core that rational systems would so motivate workers that he could cut out authoritarian supervision and eliminate labor/management conflict. Progressives like Supreme Court Justice Louis Brandeis, who named "scientific management," considered Taylor a great social reformer.

Nonetheless, he was the subject in 1911 of an acrimonious congressional inquiry into his "dehumanizing" methods. And he lived long enough to see greedy executives and consultants reduce his high-minded system to the mindless repetition of time and motion study. He died in 1915 frustrated that many people had divorced his values and married his techniques. Taylor was remembered a century later mainly for the stopwatch and slide rule. When my company went into Bethlehem Steel in 1981 to help improve labor-management relations, here's what we found: 14 levels of management, 400 industrial engineers timing jobs and setting rates, and 3400 wage incentive plans. Workers averaged 130% of base pay. The yield of good steel was about 70% compared to 95% for the Japanese, and the company was losing $80 million a month.

It took some years to untangle the mess. Bethlehem did it, though, in part by using "whole system in the room" activities that would have given Taylor nightmares. Labor-management relations got better and, after draconian downsizing, so did profitability. I wish I could end the story there. Bethlehem, like a lot of heavy industry, fell victim to global economic forces that no one could control. It went bankrupt in 2003, and its assets were sold to a more resilient rival.

Participation and Group Problem-Solving

The alternatives to Taylorism that staved off for two decades Bethlehem's demise I can trace back to the 1940's and '50's. They began, for me at least, with a 1938 research study by Kurt Lewin, a refugee from Nazi Germany and a graduate student named Ronald Lippitt. Working with boys' clubs at the State University of Iowa they documented the indisputable contrast between groups performing under authoritarian and democratic

leadership. They invented the term "group dynamics." They opened the door to remarkable organizational improvement strategies based on democratic leadership, group problem solving, and teamwork unknown a half century earlier. Douglas McGregor's Theory X/Theory Y became a module in a thousand management training seminars, ushering in a zillion-dollar "leadership style" industry.

This road, like Taylor's, also had its pitfalls. Dazzled by the heady T-group's of the 1950's and '60's, many of us believed that experienced-based training in decision-making, conflict management, interpersonal skills, collaboration and self-awareness would lead to a workplace revolution. Where Taylor trained only one person at a time (he saw groups as an uncontrollable threat), cultural change strategies in the 1960's and 70's consisted of training everybody in groups. We theorized that when everyone had the same inputs they would transform their organizations, making workplaces more people-friendly *and* productive.

This turned out to be an iffy proposition.

Many of us thought it a risky business to have people from different levels of hierarchy learn together. Too much self-exposure across levels could be bad for your career. Yet it's hard to gain influence on the whole in peer groups. Hence "flavor of the month" programs came and went like songbirds with the seasons. We were always getting people ready to do something they never actually did—gain greater control of their own work lives. Alas, people improved themselves more than their organizations.

To remedy this, OD consultants invented team building to enable transfer of training. (In the 1970's I was a builder of some of the best losing teams in American industry.) The strategic flaw of teambuilding is exposed by systems theory. You can change a system only in relationship to the larger system of which it is a part—other functions, customers, suppliers, regulators, and community.

Don't misinterpret me. Team building and training are existentially valuable activities. In both settings people can learn to be open, confront conflict, collaborate, appreciate differences, diagnose problems, and set goals—all worthy activities, What people cannot get this way is influence, let alone power, over policy, procedure, system, and structure.

Socio-Technical Redesign

There are of course, other ways to improve systems besides working on everybody's behavior. You also can improve a system by validating its central task and redefining its boundaries. Instead of looking inward at each other, have diverse people study together how to organize themselves in a shared environment. For me, the origins of this lesson date back to shortly after World War II. Several ex-British Army officers led by psychiatrist Wilfred Bion and psychologist Eric Trist started the Tavistock Institute of Human Relations in London.

During the war they had done innovative projects, notably the selection of field officers for the British Army using small, leaderless groups to test the candidates' ability to walk the tightrope between group and self interest. Their postwar-mission: find ways to rebuild a devastated British economy using brainpower, in the absence of other resources.

One student. Ken Bamforth, a ex-union leader, went back to the South Yorkshire coal mine where he had worked years before and found miners laboring underground in teams without supervisors, bringing coal to the surface around the clock. In the old fragmented system one shift undercut the coal face, another carried the coal to the surface and a third shored up the roof. If a shift ran into trouble those who came after were idle until the shift with requisite skills came back again. In the new system every shift was a "multi-skilled self-managing work team." The teams had less waste, higher productivity and a better safety record than under the old system.

Eric Trist went to the mine the next day with Bamforth. "I was a changed man when I came up," he once told me. "I had seen for the first time a real alternative to Taylorism!" The most instructive aspect of this story for me is that the innovation came from meetings between unionized miners and management on implementing a new technology of roof control. They had fulfilled in an unprecedented way Taylor's belief that increased cooperation led to superior results. Indeed, the miners rediscovered—at a higher level of technology—the way their grandfathers had mined in pick-and-shovel days when every apprentice aspired to be a multi-skilled master mechanic.

If Taylor's *Scientific Management* was in fact a human resource treatise, the book that Trist and his colleagues published in 1963, *Organizational Choice,* was a coal mine engineering text. The book describes the empirical and theoretical roots of "socio-technical systems" design. In this scheme you started with a system's core purpose, or mission, the so-called "primary task." If people internalized this task and its social, technical, and economic assumptions they could invent organizations more flexible, dynamic, and self-renewing than the ones they had.

The socio-technical method soon underwent a considerable elaboration in India, Norway, and Sweden before reaching North America in the 1960's. Along the way Fred Emery, Trist's collaborator, dubbed multiple skills the "second design principle." Instead of Taylor's one person, one task multi-skilled teams greatly increased system flexibility. They did, that is, when they also could control and coordinate their own work. Emery with his wife Merrelyn later created a simple do-it-yourself participative design practice, enabling people to redo their own work systems.

Still, what had started spontaneously in the British mines, evolved in some iterations into an infinite charting of variances and a detailed social remapping of jobs. In the best case, labor-management teams did their own designs, using methods taught them by consultants. Even then I found an awesome paradox in getting multitudes of people in a company to embrace the hard-won conclusions of a 12-person design team bobbling in a small boat, so to speak, on a boiling ocean of skeptical supervisors. To ameliorate this, some of us in the 1980's began redesigning systems in a series of large conferences, a time consuming process, that nonetheless involved many more people, and led to implementations that took only months rather than years. Dick Axelrod's Conference Model is a notable example. Even this in a world of non-stop change might prove too slow for most current organizations. In any case, the redesigned systems rarely survived the tenure of the leaders who started them.

But that is not the last word. Just as Taylor's sophisticated integration got reduced to time and motion study, so did socio-technical systems become for many people a package to be installed like new software. About 15 years ago, I was invited to a

manufacturing meeting in a famous paper company that is no more. The plant managers talked non-stop about the "multi-skilled work team model" that a consulting group had put in—and how much resistance it stirred up. The company had sacrificed participative values on a altar of canned techniques. Nobody has yet figured out how to commit people to organizational designs, even very good ones, over which they have no influence.

Getting Everyone Improving the Whole

This brings me to the fourth point on my learning curve. In the 1980's, inspired by conversations with Eric Trist and Ron Lippitt, I found myself seeking to undo Taylorism using participation wed to socio-technical principles. A series of projects I reported in my 1987 book led me inexorably toward a scary conclusion. If we truly wanted to realize values for workplaces in which productivity rested on a bedrock of dignity, meaning and community, we ought to figure out how to get EVERYBODY IMPROVING WHOLE SYSTEMS. What would that take? I noticed that in each successful case there was an attractive goal, a leader with an itch to scratch, and some energized people who had both expertise and commitment.

I also derived a few "minimum critical specifications" for effective design processes: get the whole system in the room; focus on the future rather than the problem list; and set things up so that people could do the work themselves, using the skills and experience they already had. If every human deficiency had to be remedied before people could implement a new workplace, nobody would ever get a new workplace.

Over time, I came to understand "whole system in the room" as people with authority, information, resources, expertise and need. When we convened such diverse groups, we effectively redefined a system's boundaries. That was a giant step beyond diagramming "environmental demands" on a flip chart. People who *are* each other's environment shared what they knew. Everybody came to understand the whole in a way that no one person had done before. Though this was a structural intervention, paradoxically, many people voluntarily changed their behavior.

That phenomenom I believe is the key to the success of today's "large group interventions." These structures provide opportunities for people to act in new ways. They tilt the power balance. They enable fluid coalitions in real time. Most require no training. They turn "systems thinking" into an experiential rather than a conceptual activity. They enable everybody to use for a few hours, or a few days, or a few months, what they already have on behalf of a goal larger than themselves.

I have been putting these ideas into practice experimentally for the last 20 years. Every time I run a workshop I see something I never saw before. This afternoon Sandra Janoff and I will give you a progress report on one promising new discovery. I can tell you right now, though, what the future holds: *unpredictable change.* All we have to work with is our own experience . The learning curve belongs to all of us. Indeed, if you are going to get everybody improving whole systems you're going to need some expert and group problem solving too, and it helps to have a few expert systems thinkers around.

No matter what strategies we choose, if we organization designers want job satisfaction, we still are stuck with finding techniques equal to our values. Techniques cascade down the generations like Niagara Falls. Values move like glaciers. Techniques fill

whole bookshelves. Values take up hardly space room at all. I can still say mine in eight words: ***Productive workplaces that foster dignity, meaning and community.***

The whole system in the room is just one strategy for implementing these values.

I am, however, too much of a historian to believe that large group interventions are the end of history. Every method has its limits, as we all are destined to learn. Our ancestors have given us priceless gifts, but none has prepared us for a world of cell phones, email, virtual teams, the kind of BlackBerries that nobody but a dog would chew on, and, more to the point, a global economy that is consuming resources at a rate far beyond our ability to replace them. Indeed, sustainable organizations may have no future in an unsustainable world. The future of organization design does not rest on any particular methods. It lies with the values of the people in *this* room. The pioneers whose work I have mentioned—Bion, Emery, Lewin, Likert, Lippitt, Maslow, McGregor, Taylor and Trist--all belong to the ages. They have no more to tell us.

Look around you friends and colleagues. WE are the ones who are now up to bat.

About the Presenter…

Marvin Weisbord co-directs Future Search Network, an international non-profit service agency, providing communities, non-profits, and NGO's with whole system planning workshops for whatever they can afford. He was a business executive in the 1960's. For 20 years he was a partner in the consulting firm Block, Petrella, Weisbord and a member of NTL Institute. He is on the Resource Faculty of the Organization and Systems Renewal Program at Seattle University, an emeritus member of the European Institute for Transnational Studies, an elected fellow of the World Academy of Productivity Science, and an honorary lifetime member of the Organization Development Network, which gave him a Lifetime Achievement Award in 2004 and voted *Productive Workplaces* one of the most influential books of the last 40 years. He also is author of *Organizational Diagnosis* (Perseus Books, 1978), *Discovering Common Ground* (Berrett-Koehler, 1992), and, with Sandra Janoff, *Future Search: An Action Guide* (Berrett-Koehler, 2000).

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A Historical Footnote to "Techniques to Match Our Values"

Ina 1920 article, **Kurt Lewin** described the "life value" of work. "The worker," he said, "wants his work to be rich, wide, and Protean, not crippling and narrow. Work should not limit personal potential but develop it. Work can involve love, beauty, and the soaring joy of creating. Progress, in that case, does not mean shortening the work day, but an increase in the human value of work."

--Kurt. Lewin, "Die Sozialisierung des Taylorsystems." *Praktischer Sozialismus*, 1920 (4), 5-36.

In her 2005 book **Margaret Wheatley** writes, "We have forgotten many important truths about human motivation. Study after study confirms that people are motivated by work that provides growth, recognition, meaning, and good relationships. We want our lives to mean something; we want to contribute to others; we want to learn; we want to be together. And we need to be involved in decisions that affect us. If we believed these studies and created organizations that embodied them, then work would be far more productive and enjoyable.".

--Margaret Wheatley, *Finding our Way: Leadership for an Uncertain Time.* San Francisco: Berrett-Koehler, 2005, p. 151.

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