

*"If we aspire to both the labels and the roles of helper, counsellor, adviser and supporter, using ourselves as key instruments, we must undertake a process of life-long discovery and of owning and refining our instrumentality."*

# The **Self** as an **Instrument—** **A Cornerstone** for the **Future** of **OD**

*By Mee-Yan Cheung-Judge*

**W**ARNER BURKE (1994) asserted that, "OD as a field has a bright future ... The point is that OD, or whatever it may be labelled in the distant future, is here to stay."

Such a positive assertion of OD requires its torchbearers—we, OD practitioners—to affirm our passion for OD, our commitment to developing our consulting repertoire, and our desire to continually develop our competencies. I believe among the many competencies required of us, the use of self as an instrument is at the heart of our uniqueness and effectiveness.

This paper aims to demonstrate the importance for OD consultants of establishing effective relationships with clients and the use of self as an instrument, or instrumentality, in the work. The article builds upon the definitions of instrumentality developed by Warner Burke and Edwin Nevis in exploring key practices in owning and refining the use of self in our work.

The premise underlying my approach is that OD consulting necessitates a high degree of self-knowledge and personal development that must engage OD practitioners throughout their professional lives.

## **DIVERSE ROLES OF OD CONSULTANTS**

Although there are widely ranging definitions of OD, there is a surprisingly high level of agreement among practitioner-theorists that the purpose of OD activities is to enhance organisational effectiveness. Consider the following characterisations of OD.

- Planned interventions to increase organisation effectiveness and health (Beckhard, 1969).

## **CONFERENCE CONNECTION**



**Mee-Yan Cheung-Judge** is a presenter at the 2001 OD Network Annual Conference in Vancouver, B.C. at the following sessions:  
**SS104** **Integrating Our Traditions, Transitions and Dreams to Enhance Our Instrumentality**  
Saturday and Sunday, Nov. 10 & 11  
8:30am – 4:00pm

- A process directed at organisation improvement (Margulies, 1998).
- Building and maintaining the health of the organisation as a total system (Schein, 1988).
- Organisation revitalisation achieved through synthesising individual, group and organisational goals so as to provide effective service to the client and community while furthering quality of product and worklife (Lippitt and Lippitt, 1975).

Within this context, the primary role of OD consultants is to establish helping relationships with and among individuals and groups within organisations. The form these relationships take depends on the nature of the task at hand and may incorporate technical advice in business processes, specialist services relating to organisational design and functioning, process consultation or variations thereof. Lippitt and Lippitt (1975) described these roles on a continuum defined by the degree of directiveness assumed by the OD consultant. An overview of how authors in the field describe the diverse consultant roles appears in *Figure 1* (page 13).

This review of the literature illustrates the degree to which the effectiveness of the consultant necessarily depends upon the quality of his or her relationships with clients. McLagan (1989:7) stated this succinctly:

*Organisation development's primary emphasis is on relationships and processes between and among individuals and groups. Its primary intervention is influence on the relationship of individuals and groups to reflect the impact on the organisation as a system.*

Having established the centrality of relationship building to the work of OD consultants, the next question is, "what are the key competencies and attributes essential for effectiveness?"

## SELF AS AN INSTRUMENT

*Figure 2* (page 15) summarises competencies required for effective OD consultation, as gleaned from a review of the literature.

Burke's concept of instrumentality (1982) went beyond a collection of interpersonal skills, attributes and technical knowledge to encompass the use of self as an instrument in conducting interventions. This notion of instrumentality is akin to the emphasis of heightened self-awareness in a gestalt approach to organisation consulting. Nevis defined the qualities of "pres-

ence" as the effective integration of knowledge and behaviour in *Organisational Consulting: A Gestalt Approach* as follows:

*Presence is the living embodiment of knowledge: the theories and practices believed to be essential to bring about change in people are manifested, symbolised, or implied in the presence of the consultant.* (p. 69)

The concepts of instrumentality in effective OD practice and presence in gestalt practice see the use of self as our prime asset in achieving the helping relationship. It is not an option but the cornerstone of our work. The OD consultant's ability to fill a wide range of roles depends upon this use of self.

So how do we develop our instrumentality?

The answer lies in two concepts: owning and refining our instrumentality. Each of these ideas and their related practices are based upon a requisite perception of our self as a key asset requiring both proper management and investment. Owning our instrumentality relates to the development of our self-knowledge and expertise as consultants in the field. Refining our instrumentality implies regular maintenance work on self.

In practice, owning the self means devoting time and energy to learning about who we are, and how issues of family history, gender, race and sexuality affect self-perception. It means also identifying and exploring the values by which we live our lives, as well as developing our intellectual, emotional, physical and spiritual capacities. Owning instrumentality can also be understood in terms of Cooperrider's (2000) concept of identifying the "positive core" within and using it to achieve one's dreams.

"Putting first things first" (Covey, 1995) in order to achieve balance between work and life can also be considered part of owning one's instrumentality.

In practice refining our instrumentality means dedicating time to the on-going maintenance of both self-knowledge and technical expertise. Employing a shadow consultant, a mentor or even a therapeutic relationship to continually heighten our self-awareness. For others, it may mean using self-knowledge to build a package of self-care in order to ensure that instrumentality is sustainable and lasting.

The following is a partial list of activities relating to owning, refining and integrating our self-knowledge. They are offered here—in four categories—as a springboard for readers in considering your own self-work in four categories.

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**Figure 1: ROLE OF OD CONSULTANTS**

Authors	Roles of OD Consultants
Burke, 1982	One who provides help, counsel, advice and support.
Schroeder, 1974	One who serves as a sounding board, an adviser, a confidant for the consultant who is working directly with the client. (Shadow consultant with other consultants as clients)
Lippitt & Lippitt, 1975	Outline eight roles along a continuum with <i>Directive</i> and <i>Non-Directive</i> at either end of the continuum. The eight roles are advocate, technical specialist, trainer or educator, collaborator in problem solving, alternative identifier, fact finder, process specialist, reflector. These roles are not mutually exclusive. The OD Consultant may play different roles simultaneously depending on tasks / assignments.
Schein, 1988	Key role defined as process consultation, i.e., a set of activities that help the client to perceive, understand and act upon process events in the client's environment in order to improve the situation identified by the client.
Tichy, 1974	<p>Outlines four change agent key roles:</p> <ul style="list-style-type: none"> <li>■ <b>OP (Outside Pressure)</b> – advocating certain changes, planning strategies for advocacy;</li> <li>■ <b>AFT (Analysis for the Top)</b> – conducting a study for a client organisation and providing a report for top management;</li> <li>■ <b>PCT (People Change Technology)</b> – providing a service for individuals within the organisation;</li> <li>■ <b>OD (Organisation Development)</b> – serving as external consultant to develop systems.</li> </ul>
Beer, 1980	Lists two consultant roles: 1) as Generalist with an organisational administrative perspective, and (2) as a Specialist "in the process of organisational diagnosis and intervention."
Ferguson, 1968	Lists 18 roles of OD Consultants ranging from capturing data to promote a proper psychological climate to assisting in the management of conflict, serving as plumber or obstetrician in-between, etc.
Nevis, 1987	<p>Outlines five basic roles / activities of a Gestalt-oriented consultant:</p> <ol style="list-style-type: none"> <li>1. To attend to the client system, observe, and selectively share observations of what you see, hear, etc.</li> <li>2. To attend to your own experience (feelings, sensations, thoughts) and selectively share these, establishing your presence in doing so.</li> <li>3. To focus on energy in the client system and the emergence of or lack of issues (common figures) for which there is energy: to act to support mobilisation of energy (joining) so that something happens.</li> <li>4. To facilitate clear, meaningful, heightened contacts between members of the client system (including contact with you).</li> <li>5. To help the group achieve heightened awareness of its process in completing units of work, and to learn how to complete units of work so as to achieve closure around problem areas and unfinished business.</li> </ol>

### 1. Develop Life Long Learning Habits

- Continually develop and enhance competencies in order to move flexibly among the various roles required of the OD consultant.
- Develop relationships with peers and professionals with whom to check perspectives, talk through challenges and strategies, and align values and practices.
- Actively seek feedback from clients and colleagues.
- Build a knowledge base in the field even when this seems neither urgent nor critical.
- Take responsible risks that stretch your professional comfort zone and proficiency.

### 2. Work Through Issues of Power

- Acknowledge personal issues around power and control and attune yourself to recognise their emotional triggers.
- Develop strategies to manage your own and others' power dynamics.
- Develop effective habits for establishing and maintaining appropriate boundaries with colleagues and clients.
- Clarify personal values and what is important in life. Practice "putting first things first."

### 3. Build Emotional and Intuitive Self-Awareness

- Integrate your personal and family history and turn it into a source of strength.
- Get to know your fears, blind spots and comfort zones. Use your emotional comfort (or discomfort) as data in making

choices about the work you do and how you intervene in client systems.

- Develop habits for managing anxiety about the accuracy of perceptions and efficacy of interventions.
- Acknowledge the potential power of intuition in managing decisions and risks, even in the face of clear opposition.
- Face your lack of effectiveness with certain projects and clients. Have the courage to stop working for clients who offer good money but at a personal price.

### 4. Commit to Self-Care

- Organise your calendar to include time for reflection and integration, and a recharging of your intellectual and emotional energy.
- Book regular time off to cater to body, mind, and soul.
- Have an effective self-care package, knowing that—like a machine— we cannot keep delivering a long-haul service without maintenance work.
- Use meditation or other practices to develop and maintain inner awareness and knowledge.

Over the past ten years, as I have supervised and mentored OD consultants and witnessed the working of instrumentality, I have concluded that they fall into three groups:

1. Consultants whose effectiveness is inconsistent.
2. Effective consultants who experience burn out because their high performance is costly and unsustainable.
3. Effective consultants who are in optimal condition most of the time.

The first group of OD consultants often convey a highly professional image. They are even likely to invest money and time updating their technical expertise. They can be quite effective in some projects. However, they are much less effective when projects require the use of self as an intervention beyond their technical expertise. Many have not accepted that an effective OD consultant must understand and deal not only with technology, but also with human processes such as trust, dependency, and ethics.

The second group of consultants, like the third, is committed to their mission as OD professionals, highly skilled in many types of OD intervention, and well respected by clients and colleagues. But they differ significantly in three ways:

1. The amount of time and energy they spend working on knowing themselves better.

**... if we fail to engage in self-work activities, it is certain that high performance will entail a high personal cost, both to our clients and ourselves. Through time, this will eat into our sense of well being. Many of us have become aware of the personal cost, and have learned never again to be put in that situation unwittingly.**

#### AUTHOR

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**Figure 2: OD CONSULTING COMPETENCIES**

Authors	Required Competencies
Burke, 1982	<ol style="list-style-type: none"> <li>1. The ability to tolerate ambiguity.</li> <li>2. The ability to influence.</li> <li>3. The ability to confront difficult issues.</li> <li>4. The ability to support and nurture others.</li> <li>5. The ability to listen well and empathise.</li> <li>6. The ability to recognise one's own feelings and intuitions quickly.</li> <li>7. The ability to conceptualise.</li> <li>8. The ability to discover and mobilise human energy.</li> <li>9. The ability to teach or create learning opportunities.</li> <li>10. The ability to maintain a sense of humour.</li> <li>11. A sense of mission.</li> </ol>
Argyris, 1962	<ol style="list-style-type: none"> <li>1. Self confident.</li> <li>2. Interpersonally confident.</li> </ol>
Beer, 1980	<ol style="list-style-type: none"> <li>1. Be credible.</li> <li>2. Be neutral.</li> <li>3. Ability to stay marginal.</li> </ol>
Sullivan and Sullivan, 1995 McLean and Sullivan, 1990	<p>Based on McLean and Sullivan's earlier study, they involved over 2000 OD practitioners in defining essential competences of internal and external consultants. Listed the required 187 competences under ten categories of OD activities.</p> <ol style="list-style-type: none"> <li>1. Marketing Phase (3 competences).</li> <li>2. Initial Contactivity Phase (20 competences).</li> <li>3. Start up Phase (10 competences).</li> <li>4. Assessment and Feedback Phase (45 competences).</li> <li>5. Action Planning Phase (16 competences).</li> <li>6. Intervention Phase (12 competences).</li> <li>7. Evaluation Phase.</li> <li>8. Adoption Phase (13 competences).</li> <li>9. Separation Phase (13 competences).</li> <li>10. General competences (40 competences).</li> </ol>
Nevis, 1987	<p>Outlined the skills required to be effective in using a Gestalt approach based on the Cycle of Experience as an orientation for both client and self. Organises skills in terms of consultant's major tasks.</p> <ol style="list-style-type: none"> <li>1. Ability to stay in the present and focus on the ongoing process, with faith in natural developmental sequence.</li> <li>2. Considerable sensitivity to sensory, physical functioning of self and others.</li> <li>3. Frequent tuning into your emotions.</li> <li>4. Ability to separate data from interpretation and to emphasise non-judgmental observations.</li> <li>5. Awareness of your intentions, of what you want to do or say, together with the ability to be clear in letting others know what you want of and from them.</li> <li>6. Ability to see where the client is at any time, and to respect that in working with the system.</li> <li>7. Ability to face and accept emotional situations with a minimum of personal defensiveness.</li> <li>8. Ability to make good contact with others.</li> <li>9. Ability to present self as a highly attractive yet non-charismatic presence.</li> <li>10. Capacity to be both tough and supportive during the same work session.</li> <li>11. Ability to help the client system draw meaning or understanding from its experience with the consultant.</li> <li>12. Appreciation of the significant contextual issues involved in System Intervention.</li> <li>13. Awareness of the aesthetic, transcendent, and creative aspects of working as a consultant.</li> </ol>

2. Their commitment to take time to pursue a robust self-care package.
3. The personal cost they incur because of their high performance.

The second group often performs very well for a time, and then suddenly seems to suffer from serious burn out. The symptoms can range from mild depression, loss of temper with clients and staff, lack of motivation, and continuous fatigue to physical illness, loss of focus, and serious depression.

While I emphasise the differences between the three groups, in reality, most consultants slide up and down this continuum, depending on what else is happening in our lives, and how much emotional energy we have to deal with those issues that are critical to well-being and instrumentality. However, if we fail to engage in self-work activities, it is certain that high performance will entail a high personal cost, both to our clients and ourselves. Through time, this will eat into our sense of well being. Many of us have become aware of the personal cost, and have learned never again to be put in that situation unwittingly.

## CONCLUSION

Like Burke, I believe that none of us can ever achieve perfect instrumentality, and that it is very difficult to be an effective OD consultant. We can begin the journey towards perfect instrumentality; we can never complete it. But if we aspire to both the labels and the roles of helper, counsellor, adviser and supporter, using ourselves as key instruments, we must undertake a process of life-long discovery and of owning and refining our instrumentality.

Finally, what would happen if we collectively (without a formal licensing procedure) agreed to create a bright future and make a major impact in the field of OD by the effective use of self? How would things change? I believe that organisations all over the world would be well disposed to a group of effective helpers who would become likely partners with them in the pursuit of optimal health for their organisations. Through time, we would pass on the baton to managers (our clients) and coach them to play a key role in transforming the way their organisations are run. Ultimately, a healthy organisation can develop itself with its managers as the primary practitioners. In this way, more managers will come to understand the necessary balance between freedom and constraint, democracy and authority, profit and ethics in organisation life and health. ■

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