RESEARCH IN ORGANIZATIONAL CHANGE AND DEVELOPMENT

Edited by Abraham B. (Rami) Shani
and Debra A. Noumair

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CHANGE AND DEVELOPMENT

VOLUME 29

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PREFACE

The foreword for ROCD 28, which was written in early February 2020, ended with the invitation to consider contributions to ROCD 29 that reflect new insights and practice stemming from the global COVID-19 pandemic. As we were writing the foreword, no one anticipated the magnitude and unprecedented devastation of the pandemic and its impact on humanity, society, continents, regions, communities, organizations, and families. One of the discoveries across all spheres of life was the phenomenon of individual and system resilience and agility. Becoming agile became a necessity in most aspects of life, work life and organizational life.

Most of the published academic and practitioner work during the past year and in increasing pace during the last few months seems to capture the monumental shifts in mindsets, mental models, nature of work, essence of management, the meaning of participating in emerging change, as well as designing and managing change and development. Some of the road maps of change and planned change that we have had seem to have worked while others did not. Some of the theories and models of change and development that we have had were found to be relevant while others were not. Similar experience can be found around the essence and practice of research and discovery orientations and practice.

This volume, while not addressing head on the pandemic and its impact, includes 10 contributions from colleagues around the globe with powerful insights and potentially relevant impact for researching and practicing organization change and development during and post the pandemic. The emerging people analytics subfield and organization development perspectives are brought together to present an integrated framework that can guide future theoretical development and practice. Bourdieu's concept of social position in the form of "habitus-oriented approach" is advanced to advocate for a new theory that focuses on habitus and social position in order to expand our understanding of human behavior. Kurt Lewin's original view of political labs is advanced to examine the emerging phenomenon of labs as mechanisms for organization change and development. The alignment challenges of strategy and digital technology in government organizations are examined via the use of collaborative inquiry. The essence and context of collaboration in teams is investigated in the emerging new workplace. The current state of organizational DEI practice, including the mixed and limited effectiveness of many individual-level DEI interventions and the lack of clear guidance on how to frame DEI issues from a systems perspective, is examined, and the context-level culture (CLC) framework for diagnosing and addressing diversity-related challenges in the workplace is

introduced. While focusing on digital transformation, a new class of sociotechnical system, called the Platform STS (P-STS), with new guiding design principle is advanced. The establishment of a small-scale collaborative community and utilization of an action research process generated new insights into the challenges faced by healthcare organizations. The role of action research orientation as a tool that supports new cooperation and partnership between universities and external organizations is examined. Last, in the new ROCD section "Reflection," the author compares organization development (OD) and change management (CM) across eight concepts that are relevant to both OD and CM. The argument is made that OD stresses development of people and change regarding the organization, whereas CM emphasizes facilitation and expanding their business with the client organization. A concluding statement for the comparison of OD and CM is that OD has a rich underpinning of *theory* and a clear set of *values* that provide guidelines for the work with clients, and CM has neither.

These contributions represent a commitment to the future of organization development and change viability and continuous impact on organizational agility. The field continues to evolve, and as the manuscripts in this volume demonstrate, so is the ability to generate a new level of understanding of the emerging complex nature of organizations. If some of the recent views of the emerging work systems that advocate that due to the impact of the pandemic, future workplaces are likely to be hybrid-based, with more hybrid ways of organizing, hybrid ways of managing, hybrid ways of engaging organizational members, hybrid ways of communication, hybrid ways of manufacturing, and hybrid ways of interfacing with suppliers and customers, the field of OD is in a position to be an important player in this transformation.

As can be seen, this volume includes chapters from colleagues across nine countries that explore organization change and development themes in Canada, Denmark, France, Ireland, Israel, Poland, Turkey, United Kingdom, and United States. Collectively, the volume represents rich diversity: multiple generations of authors including senior scholars and practitioners, one of the field's founders, well-established thought leaders and colleagues at various stages of career including newly minted OCD researchers and practitioners, wide variety of topics, ranging from a contribution that is an extension of Kurt Lewin's work to a new conceptual framework that is based on Bourdieu's concept of social position, to the exploration of a new design principle for sociotechnical system theory that meets the reality of digital transformation, to the exploration of "labs" as the engine or learning mechanism for OCD efforts, to the utilization and advancement of our thinking and practice about action research initiatives, to deep level of exploration of collaboration in team development to a new framework for consulting to DEI in organizations from a systems perspective to attempting to differentiate between the field of organization development and change management. Collectively, these chapters and the collaborative inquiry they represent contribute to a sustainable trajectory of research and practice that will enhance our ability to be a relevant player as the world is moving through the pandemic and to deepen the role that the field can play globally.

This volume also introduces a new component to the series. As the field continues to evolve, we felt that asking a member of the community to reflect on an issue or a theme or trace the evolutionary trajectory of a key concept or theory based on their work and bring it to our current digital context for the future would be of added value, as we are approaching volume 30 of ROCD. In this volume, ROCD 29, we are introducing this idea with a manuscript by W. Warner Burke that examines the evolution of OD and CM and draws some distinct boundaries that can be helpful for both future inquiry and practice.

From our editorial perspective, one of the best parts of our work on this series is that our collaboration with the authors always brings new learning, whether in the form of making history accessible and relevant, challenging assumptions, extending the theoretical pillars of our theory in creative ways, or integrating perspectives that heretofore have remained separate. The series has been around long enough to substantiate the claim that we have published some true classics in the field of organization change and development. We have provided scholar-practitioners across career stage, sector, and geography with a platform to share their work and for colleagues to learn from each other in order to inform future collaborations. Moreover, the ROCD series has provided reliable sources for contributing to the ongoing development of organization change and development theory, research, and practice. It is our hope, that as you read through the volume, you will consider your own thoughts and practice and possible contributions to the field and the community and you will contact us to suggest topics or themes for future volumes.

Abraham B. (Rami) Shani
Debra A. Noumair
Editors

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ARE OD AND ANALYTICS TWINS SEPARATED AT BIRTH? TOWARD AN INTEGRATED FRAMEWORK

Alec Levenson, Maura Stevenson and Alexis Fink

ABSTRACT

Organization development (OD) and people analytics (PA) have developed and are typically practiced as entirely separate and nonoverlapping disciplines in organizations. We review the principles underlying each of the two disciplines and show much greater overlap and similarities than commonly believed. An integrated framework is provided, along with examples of OD tools that should be part of the PA toolkit for any practitioner. Case studies of what the integrated framework looks like when applied in practice are discussed.

Keywords: Organization development; people analytics; HR analytics; workforce analytics; talent analytics; talent management; organization change; team performance; organization performance

And if I say to you tomorrow
Take my hand, child come with me
It's to a castle I will take you
Where what's to be, they say will be.
But the wind won't blow
You really shouldn't go
It only goes to show …
What is and what should never be. –Led Zeppelin

This chapter is about the intersection of organization development (OD) and people analytics (PA). On the one hand, OD and PA are closely related, with action research forming a core of OD practice as described by the researchers

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who write about and study the phenomena (Coghlan, 2011; Cummings & Worley, 2009; Greenwood & Levin, 2006; Reason & Bradbury, 2001; Shani & Coghlan, 2018). On the other hand, as practiced in organizations, the fields of OD and PA are often viewed as almost polar opposites, invoking metaphors such as left brain vs right brain, head vs heart, etc.

The common perception is that OD is the domain of people who like to work on people issues and change directly in the organization, rolling up their sleeves and diving into the interpersonal and team dynamics. In contrast, PA is viewed as the domain of people who only like to work with data and statistics and try to stay above the fray of the messy reality and ambiguity of working with real people in real time. While all stereotypes are overly simplistic, in this case, the reality is not far removed from the characterization: the overwhelming majority of OD people would never identify themselves as doing PA, and vice versa.

Since analytics is at the core of action research, and action research is a foundation of OD, we find the current state of affairs to be a bit puzzling. Moreover, both OD and PA seek to use information about the organization to improve its functioning, so they share common principles, even though the methods can differ greatly. In this chapter, we explore the intersection of OD and PA: where they overlap in principle and how they might be better integrated in practice. While published research has a place in academic discussions of OD and PA, for the discussion here we draw primarily from the collective experiences we ourselves have had working with organizations along with our colleagues who work in both areas.

In the first part of the article, we start with a discussion of the domains of OD and PA, defining the foundations and boundaries both perceived and actual. A key issue is the deviation of OD practice from the ideals set down by the leading teachers and researchers in the field: when working in organizations, practitioners rarely have the time, resources, and support to do OD process the "right way." The parallel issue in PA theory versus practice is the biases frontline practitioners have toward "hard" data analysis and away from qualitative methods, even though proper social science training encompasses both. The conclusion we reach is that there are opportunities for each domain to be improved by the other.

The second part of the article addresses the intersection of OD and PA in practice. We start with a discussion of specific examples of techniques that can be used dually for diagnosis and change instruments, as well as for data collection and measurement. We end with discussion of case study examples that satisfy the features of Cummings and Worley's comprehensive approach, including data collection and analysis as a core element – demonstrating how an integrated OD and analytics approach can be realized in practice.

DEFINING THE FOUNDATIONS AND BOUNDARIES OF OD AND ANALYTICS

The origins of OD and analytics are quite distinct. OD is grounded in the aspirational and human-centered ideals of the time it emerged, around the 1960s, and

focused on how the organizational system can be improved in the interest of both the shareholders and the humans who work in it. In contrast, PA focuses on measuring and improving the efficiency, effectiveness, and impact of human resource (HR) programs, policies, and systems. PA also tries to link people data to business outcomes but often struggles to make a direct connection.

The foundations and boundaries of OD: Cummings and Worley (2009) comprehensively define OD as:

> Organization development is a systemwide application and transfer of behavioral science knowledge to the planned development, improvement, and reinforcement of the strategies, structures, and processes that lead to organization effectiveness.

Specifically,

- OD focuses on "the system," where system can be the entire organization, a business unit, a department, a single site/location, a work group or team, or individual role (job). Transformation of the entire organization or a subsystem is often a primary objective.
- It applies systems diagnostics and bespoke design, using behavioral science research knowledge and insights derived from practice, such as leadership, group dynamics, work design, strategy, organization design, and international relations.
- It is concerned with managing planned change to accomplish the system-level objectives, through an adaptive process for planning and implementing change, not a blueprint for how things should be done.
- It also involves reinforcement of change beyond the initial efforts to implement a change program to a longer-term concern for appropriately institutionalizing new activities within the organization.
- It is oriented to improving organizational effectiveness, which includes (1) building the capability for organizational members to solve their own problems, (2) achieving the desired financial and technical performance needed to execute the strategy, (3) enabling its workforce to be engaged, satisfied and learning, and (4) satisfying external shareholders and stakeholders.

The comprehensiveness of Cummings and Worley's definition also highlights the challenges of taking such an approach in practice. In the real world, there are numerous factors and complexities that get in the way of achieving true organizational effectiveness. Most important are time and resources needed to support OD work and the attention of leadership. The world of business (and nonprofits) moves fast and rarely is there enough time and commitment to engage in such a rigorous process. The lament typically voiced among those on the frontlines is that the world has already changed by the time you finish the rigorous OD process.

A related issue for OD practice is reducing scope to what can be dealt with reasonably, given the available time, energy, and resources. There may be clear organization-wide or larger scope challenges that need to be addressed ultimately. Yet doing so often is not practical because of the complexity: it would require

engaging too many stakeholders, dealing with too many interdependencies, etc., rendering it impractical or even impossible to make meaningful progress on the biggest picture challenges in a reasonable amount of time. Instead, the OD practitioner identifies a smaller-scope challenge to address, fully recognizing that addressing the biggest systemic issues will require expanding the scope for diagnostics and solution solving further down the line. The objective is to achieve progress, not perfection, so tangible gains can be made to further a broader agenda.

Because of the challenges of scope, time, and resource availability, rather than engage in the full end-to-end OD process as defined by Cummings and Worley, in the overwhelming majority of cases only a "lite" approach can be applied. The lite approach emphasizes managing planned change as the primary objective, focusing on one part of the system, and applying at least some behavioral science knowledge and practice to the intervention to identify the most important primary driver(s), recognizing that secondary drivers, while important, may have to be addressed in subsequent work. In addition, reinforcement of the change is often addressed later in the process, if there is time.

In practice, the lite approach means (1) getting key decision-makers to focus more broadly on systems issues than they would have otherwise, (2) ensuring a more thorough diagnosis and development of solutions than can happen quickly, (3) introducing different ways of interpreting the data and information to describe the problems at hand, based on behavioral science knowledge, and (4) making sure both the business operating model and needs of the people who work within the operating model are addressed.

Though the lite approach often falls short of Cummings and Worley's ideal in a number of ways, most expert OD practitioners – as well as expert HR business partners and PA practitioners – work hard to ensure that both sides of the perceived trade-off between "what's good for the business" and "what's good for the humans/people" are addressed in their work. The business benefits are measured in terms of the financial and technical performance metrics, and/or measures of strategic success as defined by external stakeholders, such as introducing new products, entering new markets, developing better relationships with government regulators, etc. The people benefits can be any one of the many examples of employee engagement, satisfaction, learning, career advancement, and building bench strength for succession planning or talent pipeline objectives.

In practice, a lot of OD practitioners' time is spent developing and maintaining trusted relationships with senior leaders and key stakeholders throughout the organization. A good case in point is the video the OD Network put together highlighting "What is organization development?" (https://youtu.be/X9NE-_G4AJM). The vignettes address critical challenges such as developing and maintaining trust with key stakeholders, working through complex diagnosis and change challenges, focusing on the system, and relying on scientific knowledge. Yet the specific acts of measurement and analysis are never mentioned.

The reasons for this can be seen by examining the OD competency model developed by the OD Network (https://www.odnetwork.org/page/global-framework). The main competencies of the model are the following:

- Systems change expert: systems change leader; culture builder; innovator
- Efficient designer: efficient designer; process consultant; data synthesizer
- Business advisor: strategic catalyst; results-oriented leader; trusted advisor
- Credible strategist: credible influencer; collaborative communicator; cross-cultural navigator
- Informed consultant: self-aware leader; equity advocate; life-long learner and practitioner

The data synthesizer role, under the efficient designer competency, includes the following:

- Understands and applies basic data gathering methodologies, including both qualitative and quantitative techniques (e.g., surveys, interviews/focus groups, etc.)
- Analyzes performance, identifies the root causes of a system's current level of effectiveness, and proposes tailored solutions at all levels of the system
- Notices similarities between different and apparently unrelated information and quickly identifies the central or underlying issues
- Integrates and translates salient information into simple insights that create clarity and commitment

So the data synthesizer role clearly includes the domain of analytics, yet in practice, analytics – especially advanced statistical analysis – is often the least-employed skill of the OD toolkit. Viewed this way, one could say that, in principle, analytics competencies are just a subset of OD competencies, yet in practice, virtually no one would say that's the case.

Consider the weight given to data analysis itself in this global OD competency model: it is only one of 14 elements listed under the efficient designer competency, and that competency is only one of five main competencies, each of which have 15–16 elements within them, for a total of 75 total elements across the five main competencies. So data analysis accounts for a single, solitary element and represents only 1/75th (1.3%) of the knowledge, skills, and abilities needed for successful OD.

The reality is that most OD practitioners spend the overwhelming majority of their time focusing on activities that are in the other 74 elements that do not cover data collection and statistical analysis; and when they do focus on data collection, it's just as likely to be qualitative data as quantitative data and often directional at best. PA professionals, in contrast, are mostly quite happy to only focus on databases that lend themselves to quantitative analyses and ideally to advanced statistical analysis and often feel like they are operating way outside their comfort zone when presented with situations that require qualitative data collection and analysis; and when they engage "non-hard data" analytic techniques, their approaches typically fall far short of robust and nuanced qualitative analysis.

The foundations and boundaries of people analytics: According to van den Heuvel and Bondarouk (2017), HR (or people) analytics is "the systematic identification and quantification of the people drivers of business outcomes, with

the purpose of making better decisions." Another common framing is that PA provides a data-driven approach toward HR management (Lawler, Levenson, & Boudreau, 2004). The following description of an executive education program at MIT nicely summarizes the expectations for PA (https://executive.mit.edu/openenrollment/program/leading-people-at-work/): The course

> …illustrate[s] how leading companies are using cutting-edge techniques to analyze data about their employees to make their organizations and their individual employees more successful. Participants will gain a deeper understanding of how and when people analytics can be applied to improve critical issues such as recruiting and hiring, performance evaluation, promotion and training, compensation, and organizational change.

These definitions highlight the emphasis of PA on data and statistical methods, and that PA is designed for scale from the very beginning. PA is designed to address large-scale data analysis from the outset, from data intake through analysis and results distribution. In contrast, OD is designed for very hands-on, bespoke work and solutions. In keeping with that difference, PA draws from research on how to apply social science methodologies to the statistical analysis of people issues in organizations. The approaches often include a role for qualitative work, but usually only as a follow-up to the quantitative analysis, where organizational stakeholders are engaged in sensemaking of the study results to determine potential courses of action to be taken and to validate, even if only in a rudimentary way, the statistical analysis results. Very few PA practitioners would consider conducting qualitative analysis that starts or solely includes interviews of key stakeholders and applies techniques such as case study analysis and informed storytelling without including a statistical analysis to drive the storytelling.

The two main priorities for PA traditionally are (1) data that already exist in various computer systems (compensation; performance management; time keeping/scheduling; job assignments; competency ratings; etc.) and (b) data that are collected through systematic methods like surveys and peer ratings (such as 360-degree feedback). These are the main sources of data used to estimate models of employee engagement and performance. More recently, advances in computer software and in collaborative applications such as Slack, and applying techniques such as natural language processing, have enabled the systematic coding of large volumes of text data which previously had to be coded manually, which had made them too cumbersome to include in the models.

On the one hand, the rapid development of PA capabilities within companies has been very impressive, especially in large organizations with the resources to afford the investment. In many cases the groups are well staffed with deep technical expertise in statistics, surveys, and data science and complement those capabilities with one or more people with more of a general HR and business background. Yet for every group that is blessed with an abundance of such resources and expertise, there are many more organizations where the headcount and levels of expertise are much more limited.

As a consequence, many dedicated PA groups often struggle to move beyond basic data management and reporting, let alone rudimentary statistical analysis, because of a lack of expertise, resources, and/or both. In smaller organizations

and/or those with few dedicated PA resources, the basic issue of getting data into a state where it can be used effectively is often a huge challenge: before any advanced analysis can be considered, basic tasks like standardizing messy data and reliably calculating turnover first have to be effectively addressed, and that fundamental work can consume all available people and resources. In fact, the specific example of turnover and its counterpart – headcount – alone consume more PA time and resources than most other metrics combined: they are foundational to leaders understanding who is working for the organization and who is leaving and yet are fiendishly hard to calculate accurately and consistently given often rapid and unpredictable changes in personnel flows, the myriad of different types of employment arrangements that are commonplace these days (temps, contract workers, interns, etc.), and the challenges of assigning people to specific parts of the organization when there are complex matrix reporting relationships and team-based assignments.

Even in the more advanced groups, the focus tends to remain first and foremost on what can be addressed using data that can be analyzed statistically. This leads to the classic challenge articulated as "not everything that can be counted counts, and not everything that counts can be counted." (Note: Most Internet searches attribute this quote to Albert Einstein, though with no reference to any printed citation. Perhaps the first printed citation for the quote is from Cameron, (1963), according to quoteinvestigator.com (https://quoteinvestigator.com/2010/05/26/everything-counts-einstein/)). The counterpart is "you treasure what you measure," meaning once you count or measure something, you pay too much attention to it. This tendency has been memorialized by the classic joke about the person looking for their keys in a dark parking lot, but only under a solitary lamp, even though it's obvious the keys are not there, "because that's where the light is."

This PA emphasis on "hard" data typically leads to a bias toward analyses that are statistically rigorous but which may provide only incremental improvements in understanding the drivers of motivation and behavior: the analyses and insights are overwhelmingly at the individual level because that's the source of the vast majority of reliable data available for statistically rigorous analysis (Levenson, 2015, 2018). In a positive development, the recent proliferation of newfangled ways of analyzing unstructured text in PA has generated a lot more data that can be analyzed statistically; yet at the same time it has created an unfortunate dichotomy. On the one hand, techniques such as natural language processing have meant that rich information buried in open-ended comments in surveys and the like can now be systematically processed to identify broad themes in employee sentiment. On the other hand, even with the recent advances, such techniques cannot be fully automated and require time-consuming human intervention to ensure the right analyses are conducted and proper sense is made of the results. And adding more data at the individual level does not address the challenge of how to conduct analyses at higher levels of aggregation (team, business unit, enterprise) where interdependencies in the work either enable or block successful strategy execution.

Even more of a challenge is that the potential false sense of security engaging in such techniques can provide for PA experts, who may incorrectly assume that

such analysis is the only type of qualitative approach they need to employ. In reality, there are many situations where qualitative analysis is the only or primary option including (1) analysis of the drivers of overall organizational performance or performance of individual business units, (2) identifying the sources of cross-functional and cross-business unit collaboration and conflict that arise from the organization design, (3) comparing the performance of teams that are structured very differently and have different objectives, (4) analyzing culture, (5) identifying and comparing the drivers of managerial performance, and many more.

The unifying characteristic of all these examples is that they lack the basic requirement for statistical analysis: a large number of observations drawn from a homogeneous sample. In the case of the enterprise or a business unit, the sample size is only one observation. In the case of dissimilar teams, there is too much heterogeneity to allow for classical statistical techniques. Statistical analysis is possible only when there are data on many instances of "the same thing" such as hundreds of people in a role or tens upon tens of different teams doing the exact same type of work. While the toolkit of the typical PA practitioner may fall short for doing analysis at the enterprise, business unit, and dissimilar team levels, the good news is that the OD toolkit is perfectly suited for such work and provides a strong foundation for collaboration and cross-pollination.

WHERE OD AND PA ARE MORE LIKELY TO INTERSECT IN PRACTICE TODAY

If we were to end our discussion here, it would be quite reasonable to conclude that, like the Led Zeppelin lyrics quoted at the beginning of the piece, OD and PA resemble two star-crossed lovers who are destined to travel on very different paths that never meet up. Yet the reality is much more positive. There are current examples where the practice and processes of OD and PA already intersect in meaningful ways, whether that means using both approaches in an iterative fashion or deploying them simultaneously.

One example of an area where OD methods and PA methods are complimentary might be devising a strategy around managers for an organization. An organization might begin with the quantitative (PA) insight that some meaningful proportion of those exiting the company cite difficulties with their manager as one of the reasons for their exit. That might be complemented by employee engagement survey results that show a lot of variability in satisfaction with core manager behaviors and predictive research showing that managers with more than a year of experience are more effective. Natural language processing of survey comments might further clarify that role clarity and support for developing skills and growing careers seem to be important to effective management. However, those empirical findings do not help the organization know how to select or develop for the behaviors they have now determined to be effective. Further, the organization might not necessarily even be sure that investment in managers is the best way to spend their resources.