"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

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Introduction (2012)

Is self a "structure" or is self a "process?" How would the answers to these two question fit into our phenomenological sense of an enduring "I" – something that my Gestalt colleagues still debate about? I love the Gestalt work but am not academic enough to join that debate. Instead I would like to dangerously post a participant's view to say that there are aspects of self that are quite hardwired in us (self structure). Yes, they can be modified and reshaped, but the active self needs to be provoked to a point where the self is willing to do some work to lessen the hardwiredness. However, I also believe that self is a process. In Gestalt (Perls, Hefferline, & Goodman 1951) self can be defined as "the system of contact at any moment...there is no self independent of the situation – it is 'given' in contact." The self emerges from the changing ground and it "does not exist prior to, or apart from, relationships with the environment" (Chidiac & Denham-Vaughan, 2009). This concept is made even clearer by the Gestalt therapeutic community in which they asserted that the purpose of the self is to organize the emerging and changing experiences to make it meaningful, as the sense of self emerges from our interaction with others and the environment. As a fluid and dynamic process, the self is capable to change and adjust according to the situation within which it finds itself as well as respond to the changing needs and goals of the environment (Philippson, 2001; Chidiac & Denham-Vaughan, 2009).

What does this have to do with the content of this article? Ten years on, the crucial question I (and I hope other colleagues will join me) need to ask is have we modified and reshaped our sense of self as we have worked with many different client groups and colleagues? Or have we held on to the hardwired self and insisted that is our true self, and used every opportunity to justify our approach to work? Do we allow the diverse contacts we have had with diverse groups of clients and colleagues to help us realize: "Gosh these colleagues, clients and/or the client systems are so challenging, what type of mobilization of self needs to happen once I am made aware of what is happening? By the way, what is my emerging self from such contact tell me about me?" It is hard to talk about the continuously effective use of self if we do not allow the changing ground or the relational contact to make us more curious about the bit of the self that is unknown to us. Without doing that, it will be difficult for us to stay curious, non-judgmental, and available to help others to discover the unknown aspect to them. If self is shaped as we make relational contact, then how we work with what comes from these contacts is crucial as we continue to strive to use ourselves in the moment to formulate our work with groups or organizations, and to help our clients. I share Chidiac and Denham-Vaughan's view that the sense of self as a fluid process is a way of formulating our use of self as instrument when undertaking organizational work. Is our sense of self more structured or more fluid? And how may that affect our use of self as instrument in our consultancy work in the next 10 years?

Table 1: Roles 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 and Lippitt (1975)	Outline eight roles along a continuum with **Directive** and **Non-Directive** 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, and 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)	Outlines four change agent key roles: • OP (Outside Pressure) – advocating certain changes, planning strategies for advocacy. • AFT (Analysis for the Top) – conducting a study for a client organization and providing a report for top management. • PCT (People Change Technology) – providing a service for individuals within the organization. • OD (Organization Development) – serving as external consultant to develop systems.
Beer (1980)	Lists two consultant roles: (1) as Generalist with an organizational administrative perspective and (2) as a Specialist in the process of organizational diagnosis and intervention.
Ferguson (1968)	Lists 18 roles of OD Consultants ranging from capturing data to promoting a proper psychological climate to assisting in the management of conflict, to serving as plumber or obstetrician and in-between, etc.
Nevis (1987)	Outlines five basic roles / activities of a Gestalt-oriented consultant: 1. To attend to the client system, observe, and selectively share observations of what you see, hear, etc. 2. To attend to your own experience (feelings, sensations, thoughts) and selectively share these, establishing your presence in doing so. 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 mobilization of energy (joining) so that something happens. 4. To facilitate clear, meaningful, heightened contacts between members of the client system (including contact with you). 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.

The Self as Instrument (2001)

Warner Burke (1994) asserted that, "OD as a field has a bright future... The point is that OD, or whatever it may be labeled 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 organizational effectiveness. Consider the following characterizations of OD.

» Planned interventions to increase organization effectiveness and health (Beckhard, 1969).
» A process directed at organization improvement (Margulies, 1998).
» Building and maintaining the health of the organization as a total system (Schein, 1988).
» Organization revitalization achieved through synthesizing individual, group and organizational goals so as to provide effective service to the client and community while furthering quality of

product and work life (Lippitt & Lippitt, 1975).

Within this context, the primary role of OD consultants is to establish helping relationships with and among individuals and groups within organizations. 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 organizational 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 *Table 1* (previous page).

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) stated this succinctly:

> Organization 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 organization as a system. (p. 7)

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

Table 2 (next page) summarizes 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 organization consulting. Nevis (1998) defined the qualities

of "presence" as the effective integration of knowledge and behavior:

> Presence is the living embodiment of knowledge: the theories and practices believed to be essential to bring about change in people are manifested, symbolized, 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. We could employ 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.

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 recognize 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

Table 2: OD Consultant Competencies

Authors	Roles of OD Consultants
Burke (1982)	1. The ability to tolerate ambiguity 2. The ability to influence 3. The ability to confront difficult issues 4. The ability to support and nurture others 5. The ability to listen well and empathize 6. The ability to recognize one's own feelings and intuitions quickly 7. The ability to conceptualize 8. The ability to discover and mobilize human energy 9. The ability to teach or create learning opportunities 10. The ability to maintain a sense of humor 11. A sense of mission
Argyris (1962)	1. Self confident 2. Interpersonally confident
Beer (1980)	1. Be credible 2. Be neutral 3. Ability to stay marginal
Sullivan and Sullivan (1995) McLean and Sullivan (1990)	McLean and Sullivan involved over 2000 OD practitioners in defining essential competences of internal and external consultants. They listed the required 187 competences under ten categories of OD activities: 1. Marketing Phase (3 competences) 2. Initial Contactivity Phase (20 competences) 3. Start up Phase (10 competences) 4. Assessment and Feedback Phase (45 competences) 5. Action Planning Phase (16 competences) 6. Intervention Phase (12 competences) 7. Evaluation Phase 8. Adoption Phase (13 competences) 9. Separation Phase (13 competences) 10. General competences (40 competences)
Nevis (1987)	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. Skills organized in terms of consultant's major tasks: 1. Ability to stay in the present and focus on the ongoing process, with faith in natural developmental sequence. 2. Considerable sensitivity to sensory, physical functioning of self and others. 3. Frequent tuning into your emotions. 4. Ability to separate data from interpretation and to emphasize non-judgmental observations. 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. 6. Ability to see where the client is at any time, and to respect that in working with the system. 7. Ability to face and accept emotional situations with a minimum of personal defensiveness. 8. Ability to make good contact with others. 9. Ability to present self as a highly attractive yet non-charismatic presence. 10. Capacity to be both tough and supportive during the same work session. 11. Ability to help the client system draw meaning or understanding from its experience with the consultant. 12. Appreciation of the significant contextual issues involved in System Intervention. 13. Awareness of the aesthetic, transcendent, and creative aspects of working as a consultant.

about the accuracy of your 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
» Organize 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 can-not 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 super-vised 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 perfor-mance is costly and unsustainable.
3. Effective consultants who are in opti-mal 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 inter-vention 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, depen-dency, 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.
2. Their commitment to take time to pur-sue 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 symp-toms 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 emphasize 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, counselor, adviser, and supporter, using ourselves as key instruments, we must undertake a process of lifelong 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 organizations 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 organiza-tions. 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 organizations are run. Ultimately, a healthy organization can develop itself with its managers as the primary practi-tioners. In this way, more managers will come to understand the necessary balance between freedom and constraint, democ-racy and authority, profit and ethics in organization life and health.

Postscript (2012)

Ten years on, have the concepts discussed in this article gone out of fashion, or do they remain relevant?

There has been a lot of debate about the conditions that will lead to sustain-able changes. The traditional consultancy establishment provides very much needed services on back room work—focusing mainly on using benchmarking data to help organizations carry out continuous process reengineering work while applying rigorously the slim processes approach to ensure organizations will achieve a sustain-able cost base to face fierce competition. Our back room colleagues occasionally allow OD consultants to work alongside them, but frequently they only involve us after the back room process has been completed in order to do the damage limi-tation, people engagement work. Is there any wonder why the track record on change is rated so poorly by all parties?

This raises three questions for me. First, what do OD practitioners (external and internal especially) need to do to gain enough relational traction with those senior decision makers so that they will trust us enough to think more thoughtfully about doing the back room and front room work simultaneously? Second, how do we continuously establish our unique reputa-tion in achieving change sustainability via people engagement work, so that those

whom we serve will not go ahead with any change work without first saying "I must talk to our OD or HR person?" Third, how do we showcase and not apologize for our expertise in human dynamics, group dynamics, and system dynamics as part of business critical approaches in change?

I believe the answers to these three questions all point to our effective use of self, especially in the area of how we function and behave in the relational arena, in our use of our voice; in our courage to speak the unspeakable truth within a trustworthy and compassionate frame; in using our moment by moment sensation to meet people where they are: and to create the impact that helps people make the "right enough" decisions to drive economic efficiency within the "people matter" framework. The key challenge is how we continue to do deeper inner work so that our groundedness and our continuous fluid but evolving integrated self manages to help us to have congruence between our outside behavior and inner self. Finally, are we able to give a sense of inspiring and establishing presence when we work with people – so that by working with us people get a glimpse of "ah, that is what this change is about – because I am experiencing the end game that we are meant to be heading towards (the embodiment of the end game)." So is the use of self still critical in our field of work? I guess by now you would have made your own mind up about this – and my final question to all of us is – what are we going to do more to move closer to that end of the effective use of self continuum? Maybe it is a bit exaggerated, but the future of OD is critically dependent on all of us using ourselves effectively to bring successful and sustainable change within a humanistic framework to the world of work.

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