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Large Systems Change

Integrated Leadership Development
and Reflexive Machineries

Thesis for the degree of philosophiae doctor

Trondheim, April 2007

Norwegian University of
Science and Technology

Faculty for Social Sciences and Technology Management

Department of Industrial Economy and Technology Management

NTNU
Norwegian University of Science and Technology

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TOC:

Acknowledgements:	2
0.1 Pre-story	6
A Constitutive Story	7
Part 1: Introduction.....	16
A Thirty Year History	16
Prologue to the Research Perspective	20
Main Concepts and Definitions.....	23
Three Steps towards an Action Theory	27
Outline of the Parts.....	28
Part 2: The Literature on Leadership Research and Discussions of Integrated Leadership Development	33
2.1 Canons of Leadership Research and Practical Interventions	35
What is Leadership?	35
“Canons” in Leadership Research.....	37
Social Constructivism and Leadership Research	46
Canon Summary	52
2.2 The Autonomous Field of Leadership Research	53
Angle One: Substantial Limitations in Leadership Research.....	55
Angle Two: Leadership Development as a “Closed System” of Thinking.....	60
Angle Three: The Individual and Psychological Dimension	64
Angle Four: A Practical and Empirical Dimension	71
Angle Five: Knowledge Production and Validity	74
2.3 Theories of Organizational Development - Take Me to the Leader.....	81
Organizational Theory – History and Diversity	85
The Development of Organization Theories – Substantial Changes in Organizational Metaphors.....	93
Organizational Metaphors and Actionable Knowledge	99
Integration of the Development- Challenges of Interventions (one).....	102
The Research Question in Light of the Theory Discussions	109
Part 3: Method – Epistemology as Methodology	112
3.1 From Epistemology to Methodology	112
Epistemology Operationalized	118
Methodological Concepts.....	120
Main Conceptual Models Applied	125
3.2 Method – Empirical Context	129
Basic Project Categories:	130
Data Use and Application	133
Validity Revisited.....	138
Part 4: Analysis – Learning Cycles and Project Spirals.....	142
4.1 Project One: Conflict Management and Organizational Development.....	145
Key Observations: Paradox of Causes	151
Key Analysis: Fundamental Attribution Error	153
Key Improvement: Integration of Analysis and Handling.....	158
Key Actions: Reframing Mental Models	164
Experiential Consequences for the Large System Research Process:.....	169
4.2 Project Two: A Shift in Organizational Model	176
Key Observations: Technological Language and Rationality	181
Key Analysis: Implementation versus Participation	184

Key Improvements: Methodological Congruence	188
Key Actions: From model implementation.....	190
Experiential Consequences	192
4.3 Project three: the Centralization of Functions.....	196
Key observations: One-sided justification	203
Key Analysis: Organizational Trends and Pendulums.....	207
Key Improvements: Introduction of Change Dimensions.....	209
Key actions: Reflecting Back.....	213
Experiential Consequences	216
4.4 The Challenges of Interventions (two).....	219
4.5 Project four: Analysis of a Reflexive Machinery.....	224
What is Reflexive Machinery? – Continued.	228
Content Elements	232
Reflections in Action – Language and Reflexive Machinery	236
Key observations: Empiricist Leadership and Team Concepts.....	239
“What are cross-functional and autonomous work teams?”	240
Key Analysis: Organizational Development as Language Development	243
Key Improvements: Organizational Experience as Individual Experience.....	245
Key Actions: Reflexive Machinery as Language Developer	252
Further Reflections	263
4.6 Speculations on Reflexive Machinery - Parallel Rationalities as a Premise for Democratic Organizations.....	265
Reflexive Machineries and the Mastering of Paradoxes	274
Further Reflections: Parallel Rationalities and Democratic Organizations	277
Part 5: Conclusions and Contributions – The Methodological Takeaway.....	282
5.1 The Gap between “Seminar Reality” and “Daily Operations” – Intervention Challenges (three)	283
# 1 Regression Effects and Individual Projects.....	284
# 2 The Challenge of Non-Human Actors	286
# 3 Lack of Enabling of Leader.....	289
5.2 Generic Design Principles and Pedagogy	289
5.3 Widened Ramifications – The Need for Parallel Activities.....	296
References	304

0.1 Pre-story

To start with a caricature and physical metaphor, this text is about how to turn a supertanker by the force of a mixmaster¹. More literally, it is about how a project group varying in size between two and five researchers² has been working for a period of six years on organizational change in the production units of the largest Oil Company in Norway -- a company whose contribution constitutes approximately 10% of the Norwegian BNP. When what you need to be is a set of tug boats but what you have is a mixmaster, simple engine tuning is not enough; so this text is about experiences of *interventions*, small as well as large, in a large scale system³. The text outlines and highlights glimpses of the actions taken during this period and experiences of what works; it offers theoretical conceptualisations of leadership and organizational change; and it represents an indirect shift in perspective of project actions which entailed *moving from organizational development interventions, toward the integration and institutionalisation of leadership development for the purpose of organizational development*.

Over the period of time covered by the projects – from 2000 to 2006 - I was employed as a researcher at the Work Research Institute (WRI) in Oslo. My first encounter with the Institute was as a student (in 1999), when I was involved in organizational conflict handling projects in connection with my thesis for my Master's degree in psychology. After completing my degree, my main activities have been connected to projects dealing primarily with practical work environment and organizational development issues. Within this field, the many projects of this period have covered a wide set of topics, ranging (in chronological order) from organizational conflict handling; to mastering of “emotional labour” (in airline industry and service sector); work environment studies in the media sector; organizational development and downsizing in traditional process industry (particularly smelting

¹ A metaphor ofte napplyed by the project manager (Øystein Fossen) to characterize the project.

² The project group has included Øystein Fossen (project manager) together with Thoralf Quale, Beate Karlsen, Kathrine Holstad, Trude Steinum and myself.

³ The main six-year perspective employed in this text represents the time of my involvement. It should be added, though, that these projects were made possible by previous projects, as well as by a 30-year history of cooperation between the WRI and the company.

plants); organizational network development; and, for the two last years, regional (cluster) development in the metropolitan area of the Norwegian capital (Oslo). My involvement in these projects has taken place parallel to my work on a large number of projects in the case to be discussed here. Over the same period I have also each semester given lectures at the University of Oslo, particularly on topics of relevance for practical project development and group processes, to students dealing with development and evaluation projects.

Parallel to this, and covering the same period of time, our group at the WRI has been deeply involved with a wide range of developmental projects in the organization which provides the main case study for this text. For my part, the projects connected to this organization have represented my main activities in terms of the time and resources spent. These projects are at the core of this text; they are examined as the basis for the theoretical reasoning and practical analysis, and constitute my contribution to the EDWOR doctorate program. Moreover, of course, an integral part of my activities as an organizational researcher has been to participate in and contribute to national and international seminars and conferences, both those geared towards theoretical and academic contributions, as well as the more practitioner-oriented ones. In sum, these experiences contribute in an indirect and partly conclusive way to the reasoning presented here. Partly conclusive in the sense that certain ideas and arguments that have become internalized over the years representing and constituting my current “interpretational horizon”⁴ are sometimes presented as mine even though their actual origin might be found in a particular meeting, lecture, reading, or other activity no longer consciously available.

A Constitutive Story

⁴ This is just to say that it is difficult to keep total track of all ideas in the complex and intertextual praxis of life, even though I of course try to live up to established academic standards for theoretical references. Particularly the close and long term cooperation with the project manager (Øystein Fossen) makes it difficult to with accuracy sort what qualifies as the point where ideas “actually” departed, or who in the group planted the initial seed.

Before I dig into the intellectualisation, abstraction, complexity reduction, and analysis of the journey through the particular system at hand, I want to introduce the case through a rather personal story. The story represents some of my first experiences as facilitator and researcher in the context of a leadership development program, a program designed to support an organizational change process targeted at all the offshore production units of the system, i.e. of the Norwegian oil company that constitutes this case study. It is a story about an organizational change process where a highly traditional and hierarchy-driven organization had the ambition of changing into an offshore organization based on semi-autonomous and cross-functional teams of operators, as well as teams of leaders. As a project context the story represents the main issues related to the research question (introduced below), and it also represented my first movement away from dealing mainly with organizational development issues towards handling more integrated leadership development issues, with the overall purpose of what is here given the name “large system change”.

In terms of time, the situations described here occurred after a period of slightly more than two years' experience of projects in the system. These two years resulted in a period and a position where we – the project group⁵ – together with the department of internal consultants, were able to design and establish a comprehensive development program targeted at more than 300 offshore leaders (platform leaders and department leaders). Basically, the program was an intervention intended to support and give increased impetus to the ongoing large-system change processes in all of the offshore production units (as well as in some onshore refinery factories). In short, it was a comprehensive process through which the traditional offshore hierarchy, which had up to seven hierarchical levels from the operator to the platform manager, was to be challenged and transformed into what would essentially be a two-level organization consisting of a team of leaders and a set of cross-functional and semi-autonomous teams of operators. The established and traditional form was basically divided into professional (functional) departments, where the tasks were formally coordinated through the line of managers, a line which to a great extent was

⁵ And particularly by the efforts of the project manager (Øystein Fossen).

formalized as a line of giving and receiving orders.⁶ This system can be said to have many similarities and analogue principles to what is known as “Bureaucratic Organizations” in the theories of Max Weber (1920; 1975). Accordingly, our basic intention was to transform the organization into a more modern organization: a flatter, more empowered, and more production- and task-based one. In the rest of this text, and for simplicity reasons, this larger historical and theoretical development is generally referred to as a “*team based*” organization. These shifts are further presented in the theoretical discussions of part two, and the related experiences are dealt with in the analyses of part four. The following paragraphs, presenting some personal and psychological “micro” experiences, as well as experiences from the first meetings with offshore leaders, are merely meant as a teaser, where the purpose is to give some imaginative flesh to the more abstract analysis of interventions to come:

It was close to a horror situation. We were located in the conference room of one of Norway’s most badly designed hotels. It was the prototype of a pastel-colored cookie-like hotel with cliché references to Hansel and Gretel nostalgia. And accordingly, it was filled with all the pastel details of interior and exterior that existed when it was built in the mid-eighties. The closest neighbor was the highways and some crop fields, and the climate was cold and dark. The autumn had entered its final phase, although the freezing and pastel twilight of the surroundings was not the main anxiety-producing factor at the time. Rather, the pink room and the atmosphere were filled with overt hostility from those present. It was the first day of the first program to be run, and the group of twenty-five offshore leaders was displaying a crossed arms attitude and a heavy skepticism explicitly directed toward the change process in general, and the changes expected in terms of the role of leaders in particular. They also had close to *no* confidence in the idea of autonomous and cross-functional teams, and did not seem to represent the optimal point of departure for a three-times-four full-day seminar on how to lead this kind of changes. The overall atmosphere manifested itself as completely wrong.

⁶ Historically, managing offshore installations required the same formal education and certificates as commanding and leading ships -- a formal training which represents a long tradition of (military-like) hierarchical organizational forms with the Captain at the undisputed top, and with several clear-cut levels of command down to the able seaman. This organizational form had basically hibernated in the production system for the first decades of offshore oil production, and was seen at the time as out of sync with the main developments and trends in the “onshore” organizational world.

Basically, this was my first experience with leadership development issues, and few of the facilitators had any prior experience with handling such seminar hostility. In addition, our project group had invested rather a lot in establishing this program as an important factor in keeping up the momentum of the overall change process. The arguments produced in favor of the need for such a program were so successfully presented by the project manager that the top management had promptly decided to make the program mandatory for all leaders. (As such, this was the pilot of a long series of similar efforts to come.) And at the time, and luckily, I found some consolation in the fact that the internal consultants involved, particularly the more inexperienced ones, felt the same way. One of them even started the morning pre-brief with the following utterance: *“On my way here I was so unsure of what these days were going to be like that I wished I would either become sick, drive off the road, have an accident, or that something would happen which would make up a good reason for not showing up”*.

The anxiety we experienced in the situation was not due to a surprise encounter with the participants' extreme hostility, but rather to the prolonged challenge of having to live with it and handle it in its numerous repetitions over a total period of twelve days. Through other parallel and previous projects we were well informed of the general attitude that existed amongst the leaders at this level, and the skepticism it represented formed part of the overall justification for initiating the program. This was at a time during which several of the offshore production units were struggling heavily with the change process, and the discourses had become deeply politicized and entrenched. The division into opposite positions and arguments of the type “if you are not with us, you are against us”, was growing stronger each day; unconfirmed rumors of successes and failures were flying across the organization; and particularly amongst the local leaders responsible for the process -- the target group of the seminar -- the general resistance was growing. And there was no way around the fact that without the support of and major efforts from those represented in the room -- the local leadership of each production unit -- the change process could not be realized.

However, despite the crucial role of this target group of leaders, it seemed that their voices were not part of the initial concept and scope of participation and anchoring of the process, which had been based first and foremost on agreements between top

management and the central unions, and to a less extent on agreement between local unions and leaders – this was yet to be done (the topic of management and union cooperation on local level is further elaborated in Qvale, 2003). Moreover, the local leadership seemed to have numerous reasons for not embracing and putting their efforts into the change process, but rather making sure it became a failure. In addition to lack of involvement, many other factors also counted in, and it relatively easy to understand their hostility toward the initiatives, and their hostility toward a program designed to foster initiatives they did not believe in at the time:

A majority of the leaders had long-term experience with a system which functioned fairly well, where all parties had their well-defined roles, and the structures of command were clear. Moreover, the functional departments had long historical roots in educational systems as well as in matters of professional and personal identity. For a mechanic, to take one example, working oneself up to become the best amongst equals, and eventually moving into a position where one could use one's expertise to coordinate one's colleagues and be the main person in charge of a well functioning department was connected with a wide set of symbols of professional pride. Personal identity was so strongly linked to this professional pride that it even seemed likely that the inscription "Ola Normann, Mechanical Leader of Platform B, R.I.P⁷" might one day be found on a tomb stone. In comparison, a title along the lines of "coach of cross functional team number two", naturally did not have quite the same appealing ring to it in terms of professional pride. In addition, the strong hierarchical structure was also rooted in the fact that offshore production units potentially constitute large un-detonated bombs. Over the years, there had been many (large and small scale) accidents and injuries, and many of those with long experience at sea had suffered severe accidents and loss of workmates (as well documented in Qvale, 1993). Security issues constituted a fundamental rationale for the organizational structure. These issues loomed large and constant at the back of any employee's head, and the organizational strategy for maintaining general preparedness for accidents was structured as clear and unquestionable lines of command and responsibility.

⁷ An particular identity marker introduced by Øystein Fossen in one of the early seminar settings.

Offshore production units also mirror many of the traits described in theories of total institutions (as formulated by Goffman, 1973), as one is literally cut off from everyday life and society upon entering the unit; which is only possible after going through a whole set of security rituals connected to the necessary helicopter flight. And as Goffman (1973) shows, the role of authority and leadership takes on its own strong and fundamental dynamic in “total institutions”. The relation to those in authority seems to be amplified beyond what is normal, for both good and bad purposes. Consequently, there is a feeling of a vast distance separating life on the offshore installations from the reality of the onshore organization, and the ideas and decisions made at levels and by departments without direct and daily experience of the offshore world are met with skepticism – for a number of good reasons. A majority of the offshore leaders have long experience at sea; they have thus had numerous encounters with ideas and initiatives from “above”, and from the support system of the onshore organization. They were used to the idea that as long as they kept on as before, the wind of new concepts would sooner or later die down. From the position of any offshore leader those lacking the experience and understanding of “us out here” do not really know what it is all about. Thus, any initiative seems to always run the potential risk of rejection on the grounds that it is based on false premises.

From the more personal and individual perspective of the leaders, the experience of going from a role of clear authority and responsibility (with established respect and an identity based on professional and functional knowledge) to the more diffuse role of being part of a team of leaders (each assigned-- as it was perceived at the time -- the rather undefined role of “coach” for the autonomous teams), was explicitly, although not literally, said to be tantamount to having one’s balls cut off. The decisions underlying the change process, as well as the new concept of autonomous teams, were experienced as a massive disqualification of their history, of their knowledge, and of their established ways of running the production; in fact, it was perceived as close to a dismissal of the sacrifices they had made in their efforts to provide the Nation with its oil-based wealth. And in the pictures drawn of “the new” organization, the role of the local and front line leadership was rather invisible. It was experienced by the leaders as a void in the plans, both in terms of involvement in the preparation processes and of the intended outcome; a perception that gave rise to many rather extreme speculations based on the need to create new definitions of

roles. In particular, the circulation of new concepts, such as “autonomous teams”, formed the basis of creative speculation about the future role of the leadership: The leaders not only feared that their roles of authority were at stake; they were also afraid of losing their jobs. Accordingly, the defensive mechanisms in play were severe, and many questions dwelled on the role of and the need for a leader in a situation where the teams themselves are expected to: run the production; make decisions about which actions to take; coordinate necessary recourses; drive processes of continuous improvement; decide on the need for courses and training; order materials and equipment; have increased responsibility for health and work environment issues; and eventually, also control the main expenses.

In short, a rather “existential” worry took root among the leaders: If the teams themselves are taking over all of the tasks that are our responsibility today, and become autonomous teams, then what is left for the role of leadership? The leaders were also individually bullied for their loss of power and their fumbling with their new role, and they were constantly tested by the operators or team members in the cases where authority was actually to be transformed to the teams. In addition to making fun of the “undressed” leaders without authority, stories existed of “authority-testing” in the shape of extreme budget overspending by the teams, as well as severe violations of security issues. At the same time, the offshore leaders were supposed to be key actors in the implementation of the local processes of change, and if this group blocked the initiative, it meant a general blocking of the initiative.

It was against this background that we -- some young researchers and consultants -- met the leaders. Based on their previous experiences of extra training and seminars, and their long term familiarity with the overall hierarchical line of command saturating the system, we were pretty much perceived as representatives of the enemy, namely top managers and the sheltered onshore staff organization. As their need to channel their frustration and make their voices heard seemed vast, we probably represented grateful targets. We were representatives with the expected brief of being there to convince them -- the offshore leaders with a total of several hundred years of real life experience of how to run the production -- of how to eventually run the production more effectively through the means of a team-based organization. One does not need to be a psychologist, even though it might help, in order to understand the basis

for the hostility harbored by this group of leaders, their widespread refusal to contribute actively to the overall change process, or their lack of motivation to contribute to this particular leadership program.

Even though the situation was to be expected, the anxiety of the facilitator group ruled the preparations, leading to a sharpened focus in the preparation of the overall interventional strategy: Based on the previous experiences from process consultation and conflict handling, and the project manager's extensive experience with group processes, we tried to prepare to "stay in" the hostility, and to do our utmost not to fulfill their expectations and their attribution of frustration by getting ourselves into a defensive position, or to take on the expected role as missionaries from "above" or "onshore". In addition, the strategy was to systematically reject any temptation to enter into the political debates on organizational models and principles, restricting ourselves, rather, to pragmatic discussions on issues of general development and improvement and the solving of operational tasks; while acknowledging the organization's total dependence on these leaders in terms of bringing about changes. As the practical implementation of new organizational forms required more – not less – input from the leadership, it seemed important to hold up a "mirror" to make visible what was the contribution made by the local leaders. Furthermore, on the micro perspective we tried to resist every temptation to provide any direct answers as to what constituted correct actions, opening up for variation within rather wide parameters of general organizational principles in each production unit, rather than narrowing down the perspective and providing set definitions of the one correct way. We also set out to examine conceptions of what team leadership is about, particularly in terms of the content of the leadership role, and to openly discuss the responsibility one has as a leader and any possible motivation for working on this rather unpleasant situation. In short, the interventional strategy for handling the hostility was to shift the focus from discussions on rejection of theoretical models to discussions of practical measures.⁸

Luckily, the interventional strategy functioned, and after enduring approximately two days of "malevolence", where our efforts concentrated on taking the participants'

⁸ The content details of the program and a more thorough discussion of the interventions are given in part 4.5.

reactions seriously, and showing that their voices were heard, the atmosphere shifted drastically, with attitudes and discussions starting to address what to achieve within the existing framework. At the end of the first program module, the so called “happy sheets”, the mandatory evaluations made at the end, showed top scores. Given this psychological turn, the participants’ assessment of the program’s relevance increased steadily from the first module to the last (it also gradually increased from this first pilot group of participants and throughout the years⁹).

For me personally as well as for the group of facilitators, the overall experience was one of great intensity. The shift in atmosphere prompted a strong realization of organizational knowledge production, and represented a strong personal experience of correspondence between psychological *theory* and interventional *actions*, as well as strong and effective proof of the insightful theorem often ascribed to Kurt Lewin’s pioneering work:¹⁰

“To really understand an organization, one should try to change it”.

A powerful insight, this theorem functions as a foundation for the examinations to come; and a powerful experience, the integrated leadership development program – an initiative to support large system change -- is at the core of the analysis and discussions.

⁹ The program is still running at the time of writing, although it has gone through rather comprehensive redesign processes as new issues have become more prominent within the system.

¹⁰ Even though this insight is often ascribed to Kurt Lewin and his works (for example in Argyris, 2003), I have not been able to find the actual statement in his writings.

Part 1: Introduction

The introduction and preface outline the basic research question; give a short glimpse of the history conditioning these projects and an introduction to the research perspective; and present the main elements of the remainder of the text and the order in which they appear. Based on the gradual maturation resulting from interventional experiences and dealing with organizational and leadership development in this large system, the overall topic and research question is formulated as:

Why integrate leadership development and organizational development for the purpose of large system change?

The question is an indirect derivative of some major experiences and efforts in terms of processes of change, interventional maturation of the project group, and the theoretical discussion of part two; and it became explicitly relevant through the design and accomplishment of the integrated leadership development program, later labelled Reflexive Machinery. Parallel to this, the question is derived from identification of challenges connected to the action orientation of leadership research, explicit leadership development in action research interventions, and the integration of leadership development and organizational development in general. Each of the five parts which together constitute the text contains both a direct discussion of the question and indirect analytical, empirical, and theoretical deliberations of relevance for the examination. The main focus is therefore connected to the logic and development of interventions in large systems, and not primarily to the discussions of substantial dimensions of large systems as such.

A Thirty Year History

As an important background for the projects presented later, it is useful to consider that for a period of close to thirty years, researchers from the Work Research Institute have been engaged in different projects in relation to the large Norwegian oil

company which provides the project context for this text. This continuity is represented by one of the senior researchers at WRI in particular: Thoralf Qvale has featured prominently in a long list of projects for almost three decades. He has also played a central role in the establishing and introduction of the basic premises for the overall change process, and in the identification of the organizational concepts which were later to be brought together under one umbrella to describe “The Best Operator of the Industry” (BOI). Vital in this context is the co-creation of the main rationale for change, as introduced below; as well as the anchoring of the ideas in the shape of policy documents in the board of the company, as well as among its top management and central union representatives. A distinct part of this history, as it relates to the history of projects at The Work Research Institute, is the topic and achievements connected to cooperation between top management and the central unions. In general this cooperation lead to agreements on some of the basic principles of a team based organization as a mean to become the best operator in the industry, as well as it resulted in a widespread use of “work councils”, a local “board” for cooperation between unions and leaders at each production unit (as elaborated in Qvale, 2002).

In a short survey, parts of this history is also presented parallel to the description of three distinct phases of design development in the Norwegian offshore industry (as conceptualized by Qvale & Hanssen-Bauer, 1990, in Qvale, 1993). During the first *pioneering period*, the main focus was on coping with the practical problems associated with exploration and production in the hostile nature of the North Sea, with its many technological challenges and needs for both organizational and technological innovation. In this early phase, the operating organization was not involved in the design processes to any considerable extent. During the second *bureaucratic phase*, the increase in accidents, overspending, labour conflicts, and unacceptable employment practices caused political reactions which led to the implementation of detailed and sophisticated planning and control systems in all phases of operation, from design to fabrication and production of units. The organizational models ruling this phase were not balanced by feedback and feed-forward mechanisms between design and production phases, and suffered from organizational discontinuity; which in turn resulted in both serious overspending and improper operating design. For the same reasons, organizational learning between

production units was also at best perceived as spurious. The third phase, the *socio-technical period*, started as a reaction to the increased bureaucratization, and was speeded up by a drop in oil prices around 1986. This phase attracted and increased interest in the work of the Work Research Institute, particularly in connection with a “re-design of the design process”. There was a perceived need for innovations related to the connection between technological layout and organization, and for a modernization of the overall organizational thinking, particularly through the use of socio-technical design criteria (ibid). This also led to what later became an imperative, namely that those who will be responsible for the production phase of a new platform can develop a management philosophy on how to run the platform, and work in close cooperation with the design teams in the early phases. This in turn led to a central role in one of the biggest “green field site design” projects in Norway to date – a project in which the design and training of the organization has been closely integrated with the design and development of the technological layout, resulting in an extremely modern and team based organization closely integrated with the technological processes (Qvale, 2002).

Naturally, I have not personally taken part in this long process, and the relationship of our project group to the company builds directly on the later work and door opening function of this history, both in terms of internal projects in the company, due to the long term network, and through the forum for new organizational concepts in the process industry (FNDP¹¹), of which this company has been a member since the beginning (Qvale, 2001). This network provided one of the main inspirational sources for the organizational development issues, particularly those connected to issues of socio-technical design and participation, and thus to the introduction of team based organizations.

Traditionally, the oil and gas industry on the Norwegian continental shelf has been organized in a conservative manner, relying heavily on organizations based on hierarchical control and bureaucracy (Qvale, 1993). Not that long ago, one could find as many as seven hierarchical layers ranging from the operator to the platform manager on offshore installations. In contrast, the most recent production platforms,

¹¹ Forum For Nye Driftskonseppter i Prosessindustrien (FNDP)

such as Åsgard, are basically organized according to a dual layer model of cross-functional and semi autonomous work teams, and a lean platform management team. Older units still retain three to four layers, as well as a more traditional division between professional departments, rather than cross-functional ones. Nonetheless, some of the main efforts discussed in this text, as well as the overall organizational trends, are all forces pulling in the same direction, which is towards team based principles, albeit with different paces for different production units. Consequently, the general trend in this large system, as in many organizations these days, is to cut down the number of hierarchical levels, and to establish more cross-functional units, teams with higher degrees of responsibility, and more flexibility in terms of tasks, processes, and project dependent organizing – in other words, what is here described under the collective term of “team based organization”.

Since the mid nineties, the company has experienced several large-scale organizational restructuring and change initiatives. Some of these were initiated on the basis of low or mediocre benchmark ratings at the industry level, unsatisfactory scores on internal work environment indicators, and low employee confidence in management in general; and some were initiated based on the motivation to create a stronger international position for deep sea production. In the late nineties, the company’s ambition was to become “*the best operating company in the industry*” – an overall ambition structured around the abbreviation BOI. In theory, or by design, the change was based on some of the historical developmental processes outlined above, in combination with a more socio-technically oriented conceptualization of organizational effectiveness. Some of these conceptualizations have later turned up in general organizational principles in the trends and fashions of the last decades; and in the more specific conceptual tools and techniques found in the literature on Total Quality Management (e.g. Flood, 1993) and Business Process Reengineering (e.g. Hammer & Champy, 1993), which both adapt the task oriented focus of socio-technical design (as found in e.g. Herbst 1974); as well as in elements from Learning Organization (as typically found in Argyris & Schön, 1996; and Senge, 1990); and also in the trends of Balanced Scorecard and Management by objective trends (e.g. Kaplan & Norton, 1996). All in all, “The Client System” can generally be described as a large international organization with the general ambition of becoming the *best operator in the industry* (BOI). Initially, and based on the historical efforts, the

principles were well anchored in the policy documents and on the different levels. This text is about experiences we made at a time during which the efforts to change and thus become the best operator of the industry were at the top of the implementation agenda.

Prologue to the Research Perspective

Specialized and well-trained group-therapists are able to dissect and examine in detail and for hours what is going on in a few minutes' extract of a video-taped group discussion. A few minutes of observed actions can potentially become hours of systematic examination of everything from body language, to group roles, communication- and decision patterns, power relations, identity markers, relational issues, and other psychological dynamics. In total, as a project group we have spent more than 15,000 man-hours in the organization over the past six years, and I have personally spent some 4,000 hours. Most of this time was spent participating in the different micro cosmoses of a few hundred meetings, seminars, conferences, private dialogues, interviews, text reading sessions, report writing sessions, and so on. And when the examination of a few minutes of relational transactions can result in hour-long interpretations, by equation it becomes obvious that "systematic reflections on a few thousand hours of action" has the potential of becoming an examination process lasting a lifetime – or probably longer. Thus, to state that this text is not the whole story is not just based on empirical fact, and one practical limitation, but it is also an epistemological necessity. The main challenge, then, is to select amongst the overload of observations, analyses, improvements, actions and other kinds of experiences contained in this material.

The overloaded complexity of experiences made has to be overly reduced, and one may state with Luhman (1984; 1995) that complexity reduction as well as a level of self-reference is the ultimate and inescapable essence of any social system. Without these, there is simply nothing, or at least not a story to be told, and irrespective, one is always forced to make unjust selections. This is due to the fact that since the fundamental pixels of complexity cannot be directly observed, any meaningful observation presupposes a radical reduction. The purpose of making a point of this

here, is that this self-evident fact also entails epistemological and methodological consequences which are not always sufficiently taken into account in social research.

Of course, the overall purpose of the text – to examine the main dimensions of the research question – serves as a critical guideline for demarcation of what constitutes relevant topics for elaboration. Still, even the most narrowly defined and most detailed research question will inevitably encounter the same dilemma: One can create some basic methodological rules, and epistemologically argue for these rules (as I do in part 2 and 3); but one needs only scratch the surface of the philosophy of science to discover that ultimately, there are no basic and fundamental principles for how the rules of methodology have to be applied, and the question of demarcation is always inconclusive and self-referential. Given this situation in combination with the generally acknowledged necessity of complexity reduction, one is always vulnerable to the common critic's questions of why the reader's main area of interest is not covered as part of the examination...

Consequently, the forming and generic rules for selection and demarcation have to be legitimized through other means than "systematic reflection on action", and I will argue that this is the role of epistemology. Given the inconclusive nature of epistemological questions, rooting the discussion in actual and practical contributions may help to sort out the most relevant considerations; which is also how I conceive one of the main strategies for validating actionable knowledge (see part 3). For me personally, this acknowledgment of practical validation has been like a long-term meandering through philosophy and theory that has lead toward a primary interest in practical problems and their solutions in action. It follows that this text is filled with epistemological reflections on a large spectrum of actions, and in this introduction I aim to give a quick impression of the main perspective applied:

Historically, one can trace a pendulum development from the days of the Sophists – and probably even earlier, and also in other cultures than the western one – between different perspectives of relative versus universal knowledge, or *relativisms versus universalisms*. The tension between relativism and universalism seems to have been a feature – manifested as a continuous dialectic of positions – of western philosophy and particularly the philosophy of science for at least for two thousand years. It has

taken its current form in the many debates connected to modernism and post-modernism, as well as in the critique of positivism from the perspective of more constructivist orientations. The pendulum's position seems to shift between different positions in a debate circling around the possible existence of universal human elements of knowledge, and the contributions of culture and language to the social construction and relativism of truth. I have no ambition of solving this dispute by taking a common one-sided stance, or of getting below the surface layers of this theoretical debate; I merely aim to create a minimal platform for the applied perspective and to better understand the discussions to come.

In order to create a stylized reference, we can stereotypically place Heidegger, Gadamer, Foucault, Rorty, the later Wittgenstein, and the many branches of social constructivism in social science on the more relativistic side; and on the other side, of universalism, we find Kant, Habermas, and Apel, and the more positivistic and empiricist-oriented approaches in social science. The main point to establishing such a divide –as the history of ideas contributes to illustrating – is that both sides exist in parallel, and one could even say that they seem to constitute one another as necessary premises. Thus, the pretensions of universal validity (as found in Habermas' 1996 transcendental pragmatics, with historical connections to the philosophy of enlightenment) may be useful as a necessary counterweight to relativism, scepticism and, ultimately, solipsism. However, the pretensions of universal validity have an inherent imbalance: As universal concepts where validity is based on the criteria of truth, correctness, comprehensibility and sincerity they make perfect sense and are easy to support on a general, abstract, and philosophical level. But their general, abstract and philosophical nature normally means that they lack direct consequences for concrete and specific knowledge production and action. The more the universal validities are specified and defined as academic methods, tools or actions for knowledge production, the more they become transformed into the controversial and disputed positions we know from practically any knowledge-producing field –which they are meant to inform. When the philosophical theories of validity are transformed into actionable processes we get the never-ending disputes of validity, a discourse ruling any scientific debate on methodological practice, both qualitative and quantitative, and also the action-oriented ones. And the biggest and perhaps most common error in this debate is to use one of the sides to out-define the

other, rather than to learn from the long-term historical dialectic, and see that each position is basically strengthened by its ability to see the other position in the brightest light possible.

Simply stated, to the extent that this text is written within an action research perspective, it is a deeply rooted acknowledgement of the ability of the language of knowledge to both *uncover and produce reality*. Language has the ability to empirically uncover facts, while at the same time also producing new reality and facts through symbolic actions. Language is universally and objectively at hand (in all relevant historical and cultural dimensions), while at the same time constituting what produces the historical and cultural differences in perspectives. *This dual role of language, to simultaneously both produce and reveal reality, pervades both the theoretical discussions and the practical analyses of this text.*

The consequences for the approach here is a focus on the language in use, on differences and co-existence rationalities, on what it covers and reveals, how it is related to materiality, and on what it might or might not produce in terms of actions. And, perhaps of even greater importance for the applied perspective, some of the focus will be on how action research has to deal with both the existence and the deliverance of substantial empirical knowledge, and on methods for language interventions and co-production of new knowledge, as well as on its parallel rationalities. This general insight can be translated into numerous sets of practices, and for this context, such conceptual interventions are highlighted as a common ground for the integration of leadership and organizational development.

Main Concepts and Definitions

As the logic of language is central for the perspective, the logic of definitions is also questioned: A popular and common notion is that introductions should define – and define with (unified) clarity – the basic terms, concepts and words that are going to be applied. However, there are several reasons for treating the assumption that clear-cut definitions can be established as flawed. For example in part 2, the problem of such an assumption is discussed further and illustrated with the example of our failed

attempt to create a unified definition of the term leadership, pointing out that the search for definitions represents part of the problem in the field of leadership research.

But more generally, the flaw is connected to epistemological considerations of regression and meaning. Simply stated, when one is seeking to establish a definition, one has no other choice than to use already existing terms and concepts; and to make the definition definitive, one would also have to define these other terms and concepts; so that ultimately, one could be caught up in an infinite regression of definitions.¹² This phenomenon is also analogue to what Luhman (1985; 1995) uses as the “fundament” for the theory of social systems and their necessary self-referential and autopoietic nature.¹³ Further, the applied understanding of language in this text is highly influenced by Wittgenstein’s (1952; 1997) philosophy of language, and the notion that the meaning of language is first and foremost defined by the way it is applied and used in a set of practical situations characterized by family-similarity – a conception often translated into the concentrated slogan “meaning is use”.

A practical problem also arises from the use of singular definitions as the starting point for research based or theoretical examination: It simply overshadows the fact that different perspectives and theories are different because they define the same subject on the basis of different assumptions and preconditions, so that ultimately, they are operating with different definitions. Establishing one definition of e.g. leadership, and then discussing the different existing theories of leadership, would make the discussion artificial, and it would rule out the possibility of grasping the essential differences between theoretical perspectives, which are necessarily embedded within the use of the term. Consequently, and maybe contrary to the popular belief that clear and unified definitions are a prerequisite for good research procedures, I regard such definitions as epistemologically improper and as a hindrance to a true investigation of the topic.

¹² As discussed in part two, this is an infinite regression that has proven its existence – as a self-induced trap – in much of the leadership research tradition.

¹³ Luhman further mirrors the self-referential nature of social systems with their attempted philosophical alternatives of establishing conditions of possibility, transcendental pragmatics and idealism (particularly found in Habermasian reasoning) and other kinds of literal fundamentalism in the theory-building of social systems.

However, none of these arguments are used as an excuse for not introducing the main concepts applied, or to give a description of their use; my point is merely that these introductions are not meant to function as ultimate definitions, and their self-referential and tautological nature is seen as a natural strength, rather than something to be avoided. Furthermore, it follows from this that the meaning of the concepts is constituted in the way they are applied throughout the text, and they are meant to become more and more meaningful through their actual application. The following is a short introduction to some of the main terms and concepts that will be widely applied and discussed throughout the text:

Integrated leadership development is the term applied to leadership development particularly tailor-made with the intention of supporting organizational development processes. Adding the term integrated simply refers to the focus and design in relation to organizational development processes, partly in opposition to the traditional views of leadership development as primarily a matter of fostering individual development.

The term ***Reflexive Machinery***¹⁴ is an oxymoron which in this text refers to an interventional strategy where systematic *reflexive processes of development* are institutionalized as part of the overall “organizational machinery”; in contrast to a view of developmental efforts as one-off, single projects set apart from the “machinery” of daily operations. In this case the term refers to an integrated leadership development program institutionalized as part of the mandatory leadership development efforts designed to support organizational development.

Large Systems¹⁵ is used for this case as a term that is interchangeable with the actual “organization” or “company” discussed and analysed. The term “system” is

¹⁴ The term *Reflexive Machinery* was first introduced as a concept by the project manager (Øystein Fossen). He said upon request that it was inspired mainly by two factors: The practical experience that single organizational interventions often tend to be drowned by other initiatives, and the theoretical concepts of organizational routines, as well as single and double loop learning. These first lead him to develop a team reflection tool named “reflexive routines”, which further was inspired by theories of Actor Network (ANT) and the concept of machine like forces in social systems. These insights were later combined – to cover the organizational level – and given the name reflexive machineries.

¹⁵ Similarly the conceptualization of organizational development of this kind as “Large Systems Change” was also first introduced by Øystein Fossen through seminar discussions and texts. Both concepts were also presented and discussed by the group at Academy of Management 2004 and EGOS 2005 (Fossen, 2004; 2005).

applied in order to amplify its “social system” dimensions, with an internal complexity consisting of many “sub-systems” (organizations) and networks which together constitute the large-scale organization. Moreover, it is directly interwoven with the surrounding (geo-) political systems, with national and international systems such as the economy and technological systems of innovations, as well as with other social systems, such as, for instance, interest groups.

The term **Rationality**, and particularly parallel rationalities, refers to the family similarities, or common denominators, of concepts such as “paradigms”, “life worlds”, “interpretational horizons”, “language games”, “social perspectives”, and “sensus communis”; and to their reference to the existence of different premises and presuppositions for more and less incommensurable “ways of understanding”. Basically, we apply the term in our analysis to note the different “rationalities” of groups of people holding different positions and coming from different professional backgrounds in a social “sub system”.

The term **Constitutive Concepts** refers to words, labels, metaphors, models and ideas that contribute towards constituting and *producing* the reality they are related to. Thus, the term Constitutive Concepts is frequently applied throughout the text as a contrast to **Descriptive and Reductive Concepts**, which refer to phenomenon more directly, or describe empirical givens, without directly interacting or interfering with them. The construction of this dichotomy enters the very core of the dispute between empiricists and social constructivists in social science, and, as argued, the perspective applied here attempts to acknowledge that the role of the language of knowledge is both socially constructive of reality, and a tool for uncovering descriptive and empirical facts. This conceptual dichotomy – or paradox - thus does not represent a clear-cut divide; it is in itself both *Constitutive and Descriptive* for the approach applied.

Other definitions and necessary explanations will be given in the context where they appear, and through their actual application.

Three Steps towards an Action Theory

Before presenting the outline of the different parts of my thesis, I will round up this prologue to the applied perspective with a presentation of three steps that help place my approach in relation to other academic and knowledge-producing strategies:

The **first** and simplest stage of academic and scientific examination and critique is to simply present the critique of methodological approaches and theoretical contributions by identifying their limitations and challenges. Simple critique is particularly easy when written texts and models are taken as the point of departure. Since written texts, like any language-based models, represent reductions of reality, they are always vulnerable to qualified critique. Thus, it is possible to argue that its value is limited, both in terms of intellectual contribution and in terms further practical use, even though establishing such critiques seems to be a common academic game to such an extent that it can be said to constitute the very ethos of academic practise. In addition, a commonly experienced side-effect of pure critique is that the criticised raises his or her guard, often blocking the potential for constructive dialogue and development.

The second and more challenging intellectual move is to suggest alternative solutions and create answers as to how to make improvements. However, this does not necessarily represent an intellectual challenge or a positive contribution, unless the suggestions are implemented and tested in some practical sense. As we can empirically observe by looking into the enormous and diverse literature on organizational change, there is no lack of suggestions for alternative methods of how to deal with identified problems within this field; what is missing, rather, are attempts at, and realistic approaches to, actually applying the alternative solutions. The very relation between theory and practise, and particularly the translation of theory into action, seems to be the ever-present Achilles heel of organizational research.

From this perspective, **the third** and most important challenge is how to accomplish the alternative and hopefully better solution in practical terms. For the academic and theoretically oriented community, there is also the added challenge of how to integrate the practical implications with a necessary theoretical and epistemological

conceptualisation. Consequently, one ambition of this text is to – in theory – answer such questions through the introduction of a conceptual apparatus connected to interventions; through practical testing; through the integration of leadership and organizational development; and eventually through the actionable knowledge represented by the generic version of Reflexive Machineries.

Outline of the Parts

Part 1 (this part) represents an introductory overview of the field and of the applied epistemological approach, with its brief introduction of some of the main concepts, definitions and chosen approaches; its identification of some of the basic demarcations; and its general presentation of the project and its field setting.

Part 2 of the text is based on the existing literature in the field, and discusses connection points between leadership research, organizational research, action research, and development processes. Part 2 particularly highlights elements from the development of the field of leadership research after World War II, and establishes basic reasoning for why this development legitimizes the addition of more actionable knowledge production in the field of leadership research. Typically, the development of the field forms a narrative from the focus on leadership as individual abilities; toward a focus on situations, behaviour and relations; and ultimately a focus on leadership as the use of language and symbols. Parallel to this, it goes from a conception of leadership as a *causal* relation of giving orders, and toward today's dominant view of leadership as *transformative* practice (e.g. as captured in popular concepts as knowledge, change, and innovation management). This line of continuous development is further aligned with the particular case, which deals with the development of leaders ideally going from causal and hierarchically dominated leadership styles toward the transformative practices of organizational change and team development.

This theoretical discussion also helps illustrate why the research on leadership keeps failing to accomplish its goal of creating a substantial definition of leadership, and particularly a substantial definition of good leadership. The discussion will also

revolve around this underlying monotheism in the research – that is, the search for a “holy grail” of leadership – looking at why both the psychological and the epistemological systems of leadership studies reject this approach. One main consequence of the lopsidedness of much of the research on leadership is that it cannot be transferred and applied to practical leadership development. Part 2 further contains epistemological reasoning directly designed to bringing the field of leadership research closer to actionable knowledge and experiences. A consequence pulled from this reasoning is that, generally speaking, if leadership research is going to be of any use to leadership development, it needs to be more closely related to experience; and one example of a possible approach is represented by the topics and projects discussed in this text. Thus, part 2 also works indirectly as a legitimization of the use of experiential learning, and of the *action-reflection* method applied to knowledge production in Part 4.

Within a partly similar strategy, Part 2 also contains a short discussion on some fields and traditions within organizational theory and of traits of development in organizational theory over the last decades; as well as attempts at providing a background and theoretical basis for an action-oriented approach to organizational development. It particularly highlights a development containing integration of interventions for leadership and organizational development.

Part 3 identifies the link between the epistemology and the applied methodology, and describes the material which the analysis is built upon. This part, on methodology, establishes the basic outline of and reasoning for the methods used to systematize and analyze the field experiences and projects. It will be linked to the previous epistemological discussion on leadership research and integration of leadership development and organizational development, and conceptualize action-reflection-cycles as the basic model for systematic reflections in and on this integrative action. In general, theories of qualitative methodology represent few clear cut methodological recipes, and the methodological “toolbox” developed for this case focuses on the similarities between experiential learning and knowledge production. This method for knowledge production will be conceptualized and structured in terms of experiential learning cycles. In addition, this part presents the main material

available from the practical projects, with the main forms of data from these, as well as descriptions of how this data is analyzed.

Part 4 deals with the analysis of the projects, establishing the key project maturation, and illustrating the gradual development from organizational development to an integrated leadership development. This part deals in detail with the analysis of four key projects (out of a total of approximately 12) from the six-year period. It follows a structure where I select three projects of relevance for the gradual maturation; for the development of an interventional strategy; and the development of personal relations and positioning in the system; as well as important experiences contributing to the gradual development and increased relevance of the research question. These project analyses are selected and developed based on the criteria established in the methodological outline of part 3, and basically follow the same structure, going from key observations via key analyses to key improvements and key actions. The basic intention is to use these projects to present both my personal introduction to the field, and the shift of intervention emphasis from conflict management through organizational development, eventually to end up with a focus on *integrated leadership development*.

The last part of this analysis concentrates the focus on the establishment and application of this integrated leadership development program, and it introduces and establishes the oxymoronic label *Reflexive Machinery*, which is applied in order to highlight two interventional aspects: The application of systematic *reflexivity* on and in action as the basic foundation for integrated leadership development; and the *institutionalization* of interventional methods, that is, the importance of making them part of the overall organizational *machinery*. This takes the shape both of an integration of insights and experiences from the three previous projects discussed, and of an integration of theoretical and practical interventions. The discussion of the Reflexive Machineries will further constitute the main reasoning connected to the research question, and in the last part this will be treated as a more generic interventional method.

Part 5 consists of the conclusions and the methodological “takeaway”. This part has an ambition of subtracting the main elements from the theoretical discussion of part 2 and the analysis of part 4 in order to create a merely prescriptive summation of the pedagogical principles necessary for effective interventions, as well as a set of interventional dimensions necessary for successfully achieving large system change. It highlights benefits and limitations from more institutionalized interventions as well as interventions taking place over a prolonged period of time. Particularly three of the interventional challenges discussed in parts 2 and 4 are summed up, namely dealing with “short-term and single projects and their potential regression effects”; dealing with “non-human actors” in large systems; and the core challenge of “enabling leaders” for the purpose of organizational change. These challenges are discussed against the possibility of “institutionalizing” interventions by creating arenas for continuous and more permanent systematic reflection on and in action. The leadership development program is used as a descriptive case and is regarded as an example of such institutionalised machinery for systematic reflection, or as a *specimen* of the generic *breed* of Reflexive Machineries.

Part 2: The Literature on Leadership Research and Discussions of Integrated Leadership Development

This section is about *Leadership* as a *theoretical* field of research, and the claim that its construction of concepts inhabits traits that make it partly detached from the complexity and contextual factors of leadership *practice*. This detachment creates a particular distance between leadership experiences and leadership research. One reason is connected to the general ambition in the field to search for universal definitions of leadership, and at the same time a tendency to state that “everything” is context-dependent. The present discussion on leadership research is about such paradoxes and how these relate to practical developmental processes involving leaders and organizations. In order to be able to discuss some of the main contributions of the research on leadership and its relation to integrated leadership development, I will outline some characteristic traits of the field, considering how these relate to, and demonstrate the need for, an additional, pragmatic research strategy – one that is experientially- and action oriented. The main strategy in this part is to take leadership research as a point of departure and to show its detachment from the field of development in general, and its lack of integration with organizational development in particular. Towards the end of this section, I also illustrate that this also works, at least partly, the other way round: Research on organizational development is detached from the field of leadership research and leadership development. This double phenomenon functions as my theoretical reasoning for a closer integration between organizational and leadership development. Thus, this section also prepares the ground for the basic epistemological and methodological approach applied in the later analysis, and it provides further introduction of the main concepts applied.

The discussion is divided into three main parts:

First the discussion is related to examples of the canonized and mainstream literature in the field of leadership research, and the connection between this

literature and the knowledge production on leadership. This first part represents both a short version of the canonized literature and at the same time a canonized narration of the development of leadership research. The ambition with this part is to assess the state of the field and to suggest how it can better relate to action oriented and integrated leadership development.

In the Second part I establish a discussion of some main preconditions for the study of leadership, such as methodological considerations; the relation between individual and collective dimensions; and substantial and thematic characteristics of leadership functions. This part deals especially with some characteristics of the leadership research with epistemological relevance for the development of leadership as an integrated effort of organizational development. The ambition here is to contribute to the discussion of integration through mainly epistemological considerations.

In the third part, in order to further legitimize the integration, I give a short glimpse of some of the canonized literature on organizational development, illustrating that this literature and this field of research partly lack a conceptualization of leadership, and that it thus produces limited knowledge on the significance of integration of leadership development for organizational development.

As a literature discussion these parts connect a purely theoretical discussion to the introduction of alternative and more practical interventions for organizational development. The overall strategy of this theoretical detour is to probe into the integration of leadership development and organizational development, and thus to illuminate their integration through a discussion of basic considerations in the field of leadership research. In the context of exploring the overall question of “**Why integrate leadership development and organizational development for the purpose of large system change?**”, the purpose of this part is to establish a short and comprehensive analysis of the literature in the field of leadership; to connect it to some epistemological dimensions of knowledge on leadership; compare it with the field of organizational development; and to establish a basis for showing how this knowledge relates to the practical reasoning and empirical analysis of integrated leadership development.

2.1 Canons of Leadership Research and Practical Interventions

What is Leadership?

Literature reviews on leadership research can usually be read as an explicit or implicit ambition to answer this question. Explorations of scientific studies of leadership show that this question represents the common ambition to search for the holy grail of leadership essence. Today, there exist numberless well written literature attempts at providing overviews of the field. For my purpose here, I will apply a selection of these, using examples from overviews such as Sørhaug (2004), Northouse (2004), Strand (2001), Grønhaug (2001), Rost (1991), Bass & Stogdill (1990), and Yukl (1994, 2006). And even though these examples vary greatly in terms of approach and thematic focus, it is still possible to abstract from them a few main characteristics of the field. The main reasoning I apply, and my identification of a “canon”, build on the mainstream conceptualizations of the field as presented in this literature; and I particularly owe credit to the insights created by Sørhaug (2004) in his recent book on leadership as “Managementality” and changes in the role of authority.

This discussion has no ambition of competing with those well qualified attempts and overviews (or of trying to establish literature overview number $n+1$). Given the purpose of this text I will, rather, focus on why the attempts to answer the question itself often lead the leadership researcher into detached and “closed systems of thinking”.¹⁶ These closed systems are not necessarily conducive to practical achievements or useful in terms of helping leadership development activities become more integrated with actual organizational development. The common lack of practical applicability also provides the background for the normative attempt of this

¹⁶ “Closed systems” should be understood metaphorically and refers to Luhman’s (1995) conceptualization of social systems and their fundamental self-referring structure. The metaphor can usefully be compared with and substituted by other concepts with family similarities – to use a Wittgensteinian term – such as the ethos of leadership research and its *sensus communis* (Kant, 1995); its language games (Wittgenstein, 1953; 1997); its interpretational horizon (Gadamer, 1960; 2004); and its internal perspectives, just to mention a few attempts at conceptualizing “social coherence” and its possible demarcations.

contribution, which is to discuss arguments and possibilities for a more practical integration of leadership research and developmental issues.

As I am starting out, I find it necessary to state that this literature discussion builds on perspectives on literature reviews that are somewhat different from the ones that are commonly applied. Hopefully, this approach will contribute to a perspective more consistent with the overall pragmatic epistemology through which leadership and development are investigated. The very idea of scientific literature reviews usually builds on some basic assumptions connected both to the theoretical understanding of knowledge production (epistemology), and to the actual knowledge production (research). These assumptions sometimes create literature reviews of great value for academic communication, but it is nonetheless tempting to rework some of the doctrines and norms of existing leadership literature reviews. As my explorations in this text demonstrate, the characteristics of the field of leadership research; the substantial topics and themes in leadership research; the practical challenges connected to the amount of knowledge production over the last decades; and the more pragmatic understanding of knowledge production – all of these contain anomalies that beg for a somewhat different approach.

As a conventional contrast, we can start with some basic and generic objectives for literature reviews within the existing ethos of leadership research, and for that matter within many other topics in the social sciences. The normal objectives of literature reviews can be formulated as being:

- To identify what is the existing body of knowledge
- To identify gaps to be filled in this body of knowledge
- To identify what is the (new) contribution to this body
- To identify the theoretical position of the contribution to the body of knowledge

An examination of these objectives seems to suggest that they build on a conception of written knowledge and knowledge production as *an identifiable body of knowledge with gaps to be filled by new contributions within a theoretical position*. This is also how contributions in leadership studies and research are normally understood and applied in the general leadership literature (e.g. as found in Yukl 2006). This kind of

epistemology represents an understanding of knowledge production that has been heavily challenged by a vast amount of social scientific and epistemological contributions over the last decades.¹⁷ I have chosen not to reproduce the critique within the scope of this text, but I nonetheless find it useful to mention that this literature discussion builds on a different foundation, namely the one described and elaborated in the next parts of this document.

Moreover, I further connect the debate on leadership to epistemological reasoning by illuminating the field from five different angles. This may be better conceptualized as a way of re-thinking some of the driving assumptions in the leadership research tradition, in the sense that it represents an attempt at contributing to and participating in relevant discourses through systematic reflection on research activities –rather than at filling gaps with knowledge.

“Canons” in Leadership Research

In this part, leadership is discussed by looking at some of the “canonized” leadership literature, theories and models. The focus will be on a selection of theories and perspectives constituting the field, and particularly on theories that contribute to the argument for an integration of leadership and organizational development. My main ambition is to give a short glimpse of the historical expansion of approaches, with some of its connections to the field of organizational development, and thereby to look the consequences of applying leadership development in organizational development processes. The elements of continuous change and flux in the essence of leadership research will be highlighted, that is, the embedded impossibility of a stable concept of leadership; as well as the question of how the design of interventions can help relate to and apply this flux and continuous change on both the organizational and the leadership levels.

The theoretical “Canon” of leadership research only deals with leadership development as a practical field to a very limited extent. Consequently, in order to be

¹⁷ In Nowotny et. al (2001) the discussion on new forms of knowledge production and distribution touches upon a large field of academic and philosophical work in the landscape of epistemology and philosophy of science, e.g the discussions of positivism and methodology, and for the purpose of this text I will indirectly connect to this debate by discussing the field of leadership studies.

able to establish arguments connected to integrated leadership development, it may prove useful to see how the “Canon” identifies what is “good leadership”, thereby indirectly identifying whether it gives any normative directions for leadership development. As shown in e.g. Roost’s (1991) review of leadership definitions, there has been a development over the past century away from the study of leadership as mechanisms for steering and control, towards a focus on influence, interaction and reciprocity.¹⁸ This picture is further confirmed by the inflation over the past decade of literature within areas that have become known under terms such as “knowledge management”, “relational leadership”, “change management”, and “innovative- and transformative leadership”. This tentative shift towards relational dimensions, and perspectives from and on the historical development, constitute the two main structuring dimensions for this literature discussion.¹⁹

A conceptualisation of “Canonical works” in the field is a selective approach made for a particular purpose. It builds on selections and categorizations made in typical “overview literature”, and it can be stated, e.g. as suggested in Roost (1991), that the main elements of the storyline below by themselves represent a canonized narrative of leadership research. Accordingly, the main point here is to focus on characteristics of the field of particular relevance for the discussions to come:

“The Beginning”

When establishing the genealogy of modern leadership research it is common to create references to theories of “big men”, and to pursue a romanticized worship of the genius (Sørhaug, 2004). Thomas Carlyle (1993) with his lectures “On Heroes, Hero Worship, and the Heroic in History” is a typical point of departure for these narratives. Almost needless to state, a perspective like Carlyle’s, that is, studying leadership through kings, priests, and Gods, can of course easily be rejected on the basis of its simplification of the topic, and its naive reduction of complexity. Moreover, from the perspective of social systems and relational constructivism it is tempting to reject such a focus on “big men” and its overly individualistic point of departure. At

¹⁸ This historical change is also highlighted in Sørhaug (2004)

¹⁹ This historical development also has clear resemblances and linkages to the empirical development of the large system and the projects, and particularly the changes connected to the role of leaders; as well as to the use of an integrated leadership development program intended to facilitate a process of going from an hierarchally driven structure of steering and control, and towards a typical transformative leadership role - where guiding and coaching of more autonomous teams was the theoretical ideal.

the same time, doing so would be to ignore important historical contributions to the leadership research, and to ignore its historical and cultural origin. For instance, one of Carlyle's main ambitions was to highlight the "de-humanization" of the early industrial epoch in organizational research. With his main focus on human factors, we can say that he anticipated parts of the "re-humanization" in the critique of Taylor's (1911; 2006) "The Principles of Scientific Management", and of Weber's (1920; 2000) theories on structural bureaucracy and hegemony. Furthermore, he also anticipated a perspective on how individuals influence social structures; an approach often neglected in social sciences, where the opposite is the most common perspective. Regardless of these points, however, focussing on a single individual – and especially on the "hero" – as the only subject of a leadership study is too great a simplification, even though the leader, perceived and understood in terms of individuality and personality, attracts a lot of attention (as is evident both from the leadership literature, and from picture created by common media debates, with their abundant focus on individualized explanations in terms of both scapegoats and heroes).

In this context, and as a lesson from the origins of leadership research, there is reason to believe that the language of social science in general, and especially the language of "social constructions", through its main focus on the social and relational, is by its very structure not tuned to catching the individual dimension of leadership. The general focus in social science is more often directed towards the system's effects on the individual, rather than on how individuals affect the social system. The individual subject almost seems to be endangered in social constructivist approaches – to use one of Luhman's (1995) many critiques of relational and social "fundamentalism". As a consequence, the importance of individuals, with their paradoxical relationship to social structures, makes it difficult to handle – in theory. Although in most sociological texts the relationship between society as constraints and society as shaped through individual participation is widely discussed, this topic is less commonly addressed in terms of individual roles. Thus, both the historical and the contemporary focus on "the individual leader" make it necessary to create a more consistent reflection on the link between individual and social processes when discussing leadership research. For the purpose of this text, a parallel dichotomy can be observed in a dualism between the fields of leadership development and

organizational development. The first field is absorbed by the individual's development and the effect of this development on the surroundings, whereas the latter is preoccupied with the development of organizations and the effect this has on individuals. The divide is also found in the practical dimensions of leadership: In leadership development programs and in the mainstream literature on leadership development, for instance, the development of individuals is naturally at the core (e.g. CCL Handbook of Leadership Development. Mc Cauley et al. 2004).

The Personality of the Leader

This early focus on “big men” in leadership research has influenced the later canonical works related to studies of leadership personality, and the continuous search for the ultimate personality traits of good leaders. If we consult research overviews such as Northouse (2004), it is apparent that a focus on personality traits is still prominent in the field of leadership research. At the same time, it has proved impossible to establish through research the personality traits that are important for ensuring good leadership in general. In the attempts to create scientific explanations for good leadership there seems to exist a paradox between the fact that the individual's characteristics are important, and the difficulties in specifying exactly what aspects of these or why they are important. One of the early influential canonical works within this approach is Stogdill's (1948; 1978) meta-research (in Bass 1990; and in Northouse 2004), where he tries to survey the existing literature and thereby establish an overview of the most common personal traits possessed by influential leaders. The short version of the results is that it was not possible to establish this general picture based on the existing research at the time. Against the background of these negative results, Stogdill's conclusion was that different situations require different personalities, and that what is considered good leadership in one situation may just as well be seen as destructive in another. Corresponding conclusions and critique are well established in the field today, and on the basis of this work's canonical status in the field, we can assume the later shift towards “situational leadership” was highly influenced by Stogdill's conclusions.

Despite the fundamental problems and the lack of success, the many contributions to the research on leadership personality still constitutes a large field within leadership

research. This may be due to the commonly shared and highly practical experience most people have of the actual importance of a leader's personality. If asked, most people will relate both personal experiences and general ideas about what kind of personality a good leader ought to have. And at uneven intervals, articles and books featuring lists of important traits for good leadership, presumably empirically proven, are still produced; and in the big and growing commercial consultancy market for leadership selection, a widespread approach is to focus on personality traits.

Intuitively, one may think that at least a simple general trait such as *being intelligent* would function as a precondition for good leadership. A rather thought-provoking fact (and a curiosity) in the research on personal traits, is that intelligence constitutes a rather ambivalent trait when it comes to good leadership. Large volumes of research have concluded that intelligence can be a direct disadvantage in a leader. For example in situations that require quick problem-solving, being intelligent in the traditional sense can be a direct hindrance to fruitful action (e.g. Grønhaug et.al 2001). This particularly applies to situations where general experience from similar dilemmas is more important for a good outcome and for the intuitive handling of the situation. And likewise, there is in leadership theory a general tendency to highlight *self-assuredness* as a central personal trait for good leadership. In the same way, it is simple to give examples of good leaders who were far from secure, or of situations where secure behaviour produces less responsible co-workers; and it is often tempting – by using psychological theory – to analyse the exaggerated self-evaluation of many leaders as a compensation for feelings of insecurity rather than expressions of the opposite.

For good epistemological reasons (further explored below), the “good leader personality picture”, is probably never going to be a complete one. Even though every one of us will continue to experience that individual traits are important for leadership, the addition of just “some more research” will not necessarily help. What we are dealing with, then, is not a “knowledge gap” to be filled with more research, even though the search for “the leadership personality” will continue to influence practical and effective tools of both leadership selection and leadership development.

Situational and Behavioural Factors

A turn in the field towards the study of situational factors can be said to have resulted from these rather detached, de-contextualized, and failed ambitions of the focus on individual traits. It can be demonstrated that different situations require different personal abilities, and this reasoning seems to have led the research into more situational concerns. The shift to a focus on situations can be compared to a similar tendency in social science and the critique of positivism: here, the emphasis on cultural and historical relativism has in many respects turned into a mantra of “situational fundamentalism”, where only local and native knowledge is said to represent valid knowledge. The often one-dimensional focus on situations is just as potent an example of blindfolded reductionism as is the one-dimensional focus on personal traits and individuals. For example, among the simpler contributions of social constructivism we can observe a tendency to say that “we should not state anything general on this topic, it (everything) depends on the situation and context”; which amounts to complete relativism based on an analysis about as insightful as the fundamental belief in personal traits.²⁰

Based on this focus on “situations”, it seems that other “observables” also started to be taken into account, placing more “behavioural factors” at the centre of leadership studies. A similarity can be observed between the development of social science and the development of leadership research, at least in the sense that the research methods applied have faced some of the same challenges, critiques and improvements. The turning away from what was considered a romanticized picture of individual leaders; and from detached theories; weakly founded opinions; situational relativism; and other non-scientific approaches, seems to have led towards “behaviourism” in leadership research. Like in social science in general, this shift represented a search for the independent variables determining for leadership; in this

²⁰ Wittgenstein’s concept of “family similarities” and the “private language argument” are useful tools for getting out of this either/or situational trap. In short, he demonstrates that in order to be able to see at all what makes the distinctions between situations meaningful, we depend on their family similarities; in other words, we are dependent on the similarities to see the differences. Relying exclusively on situational similarities is as false as relying only on their contextual differences. Hence, being able to generalize is necessary in order to create meaning, even though both universal truths and contextual solipsism can be shown to be contradictions in terms. Moreover, Luhman’s (1995) insistence on and conceptualisation of the mutual necessity of systems, sub-systems, and environments, and his claim that none can exist without the other, also shows a way out of reductive “situationalism”.

case variables identifying effective leadership behaviour. And as is well recognized today, this approach also failed to fulfil its theoretical promises. The behavioural focus can be said to have met the same predetermination as its behaviourist sibling within more psychologically-oriented research. The operationalization of behaviour, the identification of independent variables, the artificial use of laboratory metaphors, and so on, rendered this approach incapable of capturing the essence of realistic leadership. Ultimately, “the laboratory” approach proved even more detached from the essence of leadership than other approaches (Sørhaug, 2004). It seems that both the personal and individual dimensions, as well as the complexity of any situational dimension, disappeared through the focus on the independent variables of behavioural elements; just as they did in psychological behaviourism as stereotypically attributed to Skinner and Watson’s theoretical contributions (as stated in Saugstad, 1998). Although the focus on behaviour did not lead to a scientific breakthrough in leadership research, or in terms of the ability to identify good leadership; it has nonetheless resulted in a large amount of rather widespread concepts, tools, techniques, and models. Elements of these models are still applied and are asserting their influence to a great extent both in the field of leadership research and in the field of leadership development, as can be illustrated by many examples from the *Handbook of Leadership Development* (Mc Cauley et al, 2001). The argument is that the focus on behavioural aspects represents the approach that has had the greatest influence on the tools, models and metaphors applied in both educational and traditional leadership development settings. Even though the perspective has been proven to create immense problems as a research approach to studying leadership, behavioural approaches are widespread in the design of tools for leadership development. I consider this paradoxical tendency, the rather high negative correlation between lack of research support and the practical diffusion of tools, a crucial starting point for further investigation and illumination of the relation between theory and practice in leadership research. What does it say about the experiential detachment of leadership research, that tools and models without research-based support are widely applied and diffused for the purpose of training and development; while the more well-documented models rarely come into use?

As an example of a canonized breakthrough in the behavioural approach, we can use a major post-war research project established at Ohio State University (as

described in Northouse, 2004; Sørhaug, 2004). To identify effective behavioural elements, the project used a traditional research set-up, thus identifying 1800 descriptions commonly used of leadership. These were divided into 150 categories, categories which in their turn formed the foundation for a widely used “Leader Behavior Description Questionnaire” (LBDQ). In short, some thousand employees answered the LBDQ, and factor analysis of their responses identified two main factors: *Consideration* –showing consideration, being relationally oriented, showing respect and trust; and *Initiation* –being task-, productivity- and time-efficiency-, and structurally-oriented. These variables were considered different and independent variables, and in later models they have been translated into a commonly used and widespread distinction between *relational and task oriented* leadership

The point here is not to delve into the methodological limitations of this set-up,²¹ but to show an example of a study that has had been used as a canonized basis by later leadership research. The dichotomy of *task* versus *relational* leadership orientation has been highly influential within the development of behaviour-oriented tools. And within tools used in leadership development programs, such as 360 degrees feedback tools, group reflection tools, and tools for continuous handling of administrative structure and organizational culture, it constitutes a divide still widely applied.

The basic metaphorical dichotomy of task and relational orientation has influenced a number of other models, often fitting a variation of the two dimensions into a traditional four-field table. Blake and Mouton’s (1984) four leadership styles based on high and low scores along the two dimensions is one example of this. Another example is Hersey and Blanchard’s (1987) model, where they similarly create four styles and link them to the “developmental maturation of employees”, thereby adding a *situational dimension* for leadership style. This had the ambition of establishing categories of proper behaviour according to the four different situational factors. Apparently, over the years more than a million leaders have been exposed to this particular model while participating in developmental programs, and Hersey and Blanchard state themselves that due to its wide representation, 400 of the Fortune

²¹ For example the tautological dimension in using people’s descriptions and definitions to measure and “essentialize” (factor analyse) their descriptions and definitions.

500 companies are regularly using this distinction as a basic categorization for internal development tools (in Sørhaug 2004). At the same time, a great many other models building on this distinction also exist, and the interesting point here is that according to a review made by Yukl (1994), *virtually none of the many research projects completed are able to provide any further support for the validity of such models for directing effective leadership behaviour.*

Such models, as conceptual and constitutive actors, seem to travel far and become heavy formatting metaphors for leaders (and others), even though there is no clear scientific support for their contribution to effective leadership. It should perhaps come as no surprise that other forces are stronger than those of scientific validity when it comes to application of leadership knowledge, although we can only speculate as to what kind of forces these may be. One tempting interpretation is that the lack of traditional scientific validity is compensated for by a validity connected to workability: Workability in the sense that the models seem to be seducing metaphors serving the function of structuring the thoughts in a field filled with confused, complex and paradoxical dimensions (as elaborated below). They may well be able to penetrate the chaotic picture and the paradoxes of everyday leadership, becoming welcome tools for complexity reduction, and for giving a structure to the question of “how to deal with the topic”, even though it is not possible to establish their efficiency through conventional leadership research.²²

In line with this reasoning, the opposite also seems to be true: There seems to be a negative correlation between scientifically well-founded models, their practical diffusion, and the connected experience of workability (Sørhaug 2004). Taking such insights seriously implies a rather radical change in the perception of the division between scientific theory and practice. At the same time, it establishes a need for radical change in leadership research – if this is to have the ambition of becoming useful and connected to the practical experience of leadership. Thus, this paradox can work as one of many steps toward a more integrated leadership research, where

²² This reasoning is distinctive from a more common and obvious economic analysis where the “fulfilment of a need” (demand) makes such models easy objects to sell (supply) in a capitalistic, confused, slogan and fad dominated market of leadership development. A great number of academic analyses establish such connections, and they constitute the most traditional critique of unscientific “management concepts” (e.g. in Rolfsen 2000). In this perspective, the ritual reference to the forces of a capitalistic market represents repetitive analyses with limited ability to transcend the critique and to point towards useful actions.

experiential approaches are at the core of knowledge production, and where the overall link to leadership development and organizational developments is a natural connection.

One reason for this negative correlation seems to be of a more practical nature: If one, as a leader, wants to take the scientific theories of leadership into account, with the intent of putting them into use, the models are simply too complex to be of any useful help. This is exemplarily illustrated in Yukl (1994), and pointed out in Sørhaug (2004). Yukl accomplishes a meta-exercise by combining the major, and some of the best documented, dimensions of leadership research established over the past 50 years of research in the field. From this he constructs an “integrating conceptual framework” of leadership, with the ambition of summing up the most influential research in one model. The model is a flow chart of relations and contains everything, ranging from individual leader traits, behavioural aspects, power relations, situational factors, and success criteria, to fairly well documented intervening variables. Thus, he creates what seems like a theoretically and scientifically sound model, but at the same time a model so complex that it becomes close to useless for normal applicable purposes. For example, if the intended use is to assess a practical situation, or to debrief a problematic incident, or to categorize actual leadership actions, the model is simply so complex it would serve to make the picture rather more chaotic than systematic. Based on my own experience of leadership development initiatives, my simple guess would be that if the model were introduced for leaders operating in a normal leadership setting, they would be more confused by trying to evaluate actions, decisions, and planning according to the model than doing the same without it.

Social Constructivism and Leadership Research

A more recent shift in the field of leadership research is a turn towards more symbolic, language, and constructivist approaches. These come in many disguises, often have links to the classic work of Berger and Luckmann (1971), and are placed under the umbrella of social constructions or social constructivism (e.g. Gergen 1994). Some are also highly influenced by the more textually oriented studies of

“Deconstruction” rooted in the work and tradition of Jacques Derrida. It seems that the massive critique of the established scientific approaches in social science over the last decades, and especially the critique of positivism, has had a twin impact within leadership research. Another example from the field of organizational theory is the critique formed according to the influence of theories such as Carl Weick’s (2001) contributions of seeing organizational knowledge as socially shared ways of making sense of the environment and the weight on socially shared constructions.

We can interpret the more constructivist and linguistic turn in leadership research partly as a reaction to the massive critique from within the field itself, and the enormous problems associated with trying to establish knowledge within the existing epistemological framework discussed above. The anomaly created by the inability to fulfil the promise of explaining what effective leadership consists of, or the causal relations of effective leadership, naturally throws open the field for other epistemologies and research paradigms. The shift towards a study of symbolic interactions, constitutive concepts, and how words and language work, can in such a picture represent a turn which tries to save the research from its own dissolution brought on by broken promises. It yet remains to be seen where this will all take the field, but I will argue that the shift towards social constructivism will be no more able to solve all the identified problems, or to fulfil the field’s somewhat different expectations, than previous approaches. It seems that many of the contributions within this symbolic and linguistic turn generate an understanding and a conceptual apparatus which in some senses are just as one-dimensional and detached from the essence of leadership as their more conventional and positivistically oriented predecessors. Two main arguments can be established in support of this objection:

The first of these arguments is the lack connection between the epistemology of social constructivist theories and substantial psychological dimensions. So far, and as an example, the essence and dynamics of individual and social psychology are not well linked to social constructions, and most theories within social constructivism seem to be detached from the matter of human psychology. There is a tendency, rather, to “reduce” social constructivism to a matter of the structures of language and communication. When it comes to the field of leadership, these limitations become particularly apparent when dealing, for example, with relational psychological

dimensions such as authority and dependency. And one does not need to make that many self-reflections or situational observations to understand that forces and systems far beyond the scope of language and communication play important roles in the knowledge production about human life.

The second argument is linked to the tendency to under-communicate how for example technological and economic forces and systems influence social constructions, as parallel systems, and how material forces both form constructions while at the same time constituting active agents themselves.²³ However, even given these insufficiencies, one can argue that social constructivism and the linguistic turn in social science have made major contributions and represent a step forward in the effort of fine-tuning the understanding of social phenomena in general, and particularly in terms of understanding the role played by language and communication as constructive and constitutive elements. This is particularly so when it comes to bringing research approaches a step further from the reductions and essentialist perspectives of the conventional search for the best definition of leadership. Just as any text is never the whole story; neither is any stated epistemology the whole truth about knowledge production. By necessity, any representation of a social system will put some dimensions to the fore while relegating others to the background, thereby over- and under-communicating matters. The point here is merely to comment on the fact that two important dimensions of leadership, namely the matter of psychology and the matter of technology and economy, have a tendency to disappear in the esoteric discussions about the role of language in social constructions.

Different types of “deconstructions” of social phenomena are among the methodological approaches that can be placed under the umbrella of social constructivism and its related epistemologies. They can be applied as a method to study the field itself, to illustrate by a kind of deconstruction that the deconstructions of knowledge on leadership are not a result of the work of declared deconstructivists, but rather of the work of traditional “empiricists” in the field: What we can name the

²³ Both of these arguments are of an epistemological nature slightly beside my main line of argument here, and those interested in an elaboration of the arguments on limitations of social constructivism and linguistic reasoning should confer the comments of Dag Østerberg in Pålshaugen’s (1998) *The End of Organizational Theory*.

real deconstruction of leadership knowledge is perfectly well accomplished by the traditional field itself, even though it is not explicitly intended and goes under a different name. As the above discussion of the main perspectives demonstrates, the strongest critique of these perspectives seems to be established from within, through rather harsh methodological “deconstructions”:

“The deconstruction is established through a neat and thorough self critique conducted by the many “hard-working empiricists” in the field”
(Sørhaug, 2004; my translation).

This critique from within contributes to three typical deconstructive strategies, even though it is not intended as a deconstructive effort, or as an attempt to place itself within the deconstructive tradition: The first of these strategies is set through the massive critique of the overall lack of ability to establish clear definitions of leadership, and thus the lack of ability to produce meaningful systematic measures and observations. This argument is illustrated as the almost mandatory ritual of any textbook on leadership of complaining about the lack of clear definitions. The second strategy is set through the critique of the ambiguous connections between leadership and efficiency, and the related inability to establish clear knowledge on what is effective or “good” leadership. The three-fold critique connects to the paradoxes elaborated in the next part of this text, and a similar interesting paradox is linked to the third strategy (ibid): Why does the topic of leadership attract so much attention, including from the research community, when it has proven difficult to ascertain whether leadership is by definition possible to observe; and when if it is observable, it is unclear whether it works; and when if it works, for most situations it is possible to show that something else could work just as well?

The reason why this topic attracts attention is of course manifold, but one rather phenomenological, psychological and social constructivist dimension contains an important part of the answer: This dimension is to be found in all the theories about leadership dealing with *attribution theory* and the construction of authority (Hewstone, 1989). As a common denominator these theories explain important aspects of the general attraction towards leadership in terms of the leader’s representation of personal causation of social phenomena. The generic answer in the attribution

approach to leadership is that leadership attracts attention because it contains symbolic power, and by representing a rather visible and continuous object – the leader – in the otherwise, blurred, discontinued, chaotic, ephemeral, paradoxical and ever-changing context of everyday life. It thus conceptualizes the attention as a symbolic construction based on perceptual and cognitive heuristics applied to situations otherwise unintelligible.²⁴ Or with Luhman's (1995) conceptualization, complexity in itself is unobservable; the chaotic and complex situation of organizations presupposes that complexity reductions are observed, and leadership may represent one such category or manifestation of reduction – or to go further: Leadership is complexity reduction.

The three “deconstructive” arguments or critiques from traditional leadership research are quite fundamental, and could lead to the legitimization of a more interpretative and symbolic approach to the study leadership, or even to the conclusion that symbolic interpretation, or a version of social constructivism, is the only way to study leadership. Such an approach is rejected here for the reasons mentioned above, and because of the tendency of under-communicating more materialistically-oriented dimensions when language-based constructions take the main position.²⁵

And even more importantly for this discussion from a pragmatic and action-oriented perspective, the production of workable effective concepts and tools in leadership development – including integrated ones –still today takes place within other approaches than the ones found within social constructivism. Even though more “positivistic” models, as argued above, often work by their contribution to reflections

²⁴ Indirectly, when the social constructions created by projecting situational ineligibles on individual leaders are used to explain the “leadership attention”, it represents a typical cognitive psychological approach. A cognitive approach to social constructions has limitations when it comes to dealing with e.g. the role of emotions in attribution, parallel to the limitations of a language-based approach. The simple fact that we – all humans - are literally born into a first emotional attachment based on unilateral dependency, might just as well explain the attentions of leadership. Without digressing into the psychology of infants, we can state that the genealogy of emotions is probably just as relevant for the construction of attributions as other factors, which illustrates in a simple way a limitation within the symbolic and merely cognitive approach.

²⁵ Again, this is not to say that symbols and language are not material happenings, and represent both actions themselves as well as they are fully able to produce new actions. What I underline is the tendency to under-communicate the importance of materiality. i.e. technology, when symbolic actions are the primary focus of interpretations, as they often tend to be within “social constructivist” analysis. Actor Network Theories, like Law and Hassard (1999) elaborate on this tendency.

on actions through more symbolic reasons than through traditional criteria for scientific validity.²⁶

Another more empirical approach to explaining the turn of perspective and interest towards symbolic interpretations and language can be found by looking at a more general shift in the conceptualisation of means of production over the last decades. It will not be fairly dealt with here, but we can point to the general growth in organizations introducing symbols and relations as a dimension of capital, where mere “symbols” seem to constitute more important means of production. One example is the purpose of knowledge production, and stereotypically within research and innovation-intensive enterprises. As such, symbols also represent an increased focus on social constructions of relevance for production (of knowledge), and are typically highlighted under today’s canonized umbrellas of “Knowledge - Innovation - Relation - Transformation”, and similar leadership and management concepts.

This can be exemplified through experiences I made over the past year through my involvement in the development of leaders of corporate communication in the same system, both within the top management and in relation to their representation in each of the sub systems, the business units, and their leadership groups. The basic tasks of these leaders encompass all the various aspects of information management, a fact which represents a parallel shift in organizational perspective from what I have worked with within the more functional areas of production. Coming from a perspective where the organization of work is designed as a result of the tasks and the layout of the technology at hand, and the interpersonal relations are organised from starting point of the structure and nature of the task; this experience represent a shift towards a rather opposite logic, where the task – information management – is basically to manage relations, and the ultimate task is relations. In this context, the means of production are symbolic actions creating the necessary and wanted relations with the employees, with unions, with government, with media, with foreign countries, with cooperating companies, with sub-deliverers, with

²⁶ To use a relevant metaphor from Sørhaug (2004): Creating a complete epistemology, and thereby both starting and ending with symbolic interpretations, as argued for in the more extreme approaches (e.g Gergen, 1994), is similar to putting the name “Placebo” on the label of placebo medication. This metaphor is used to state that symbols do of course work and have effects, especially the Constitutive ones, but their effect is limited when they are perceived simply as symbols.

consultants and researchers, and with all other stakeholders considered relevant. In short, it means organizing for a purely social and psychological construction and production of relational meaning. And the means of production are basically symbolic, in the shape of information strategies. Moreover, these are symbolic actions with far-reaching material consequences, for example in the shape of negotiations for a concession to develop a new-gas driven power plant; and over whether this will have permission to emit CO²; or whether the company will get the operating role of a new oil field on the continental shelf; or whether it will manage to become the preferred contract partner in a new Russian/Siberian development project. The development of the necessary relations is then naturally concentrated on the relational and “transformative” end, on a scale going from causal, to transformative management and leadership – as seems to be the overall trend in the conceptual and practical development of the field.

Canon Summary

This glimpse into some main approaches in the field of leadership studies partly serves to illustrate a historical development, and partly provides a picture of the field today. Even though the narrative highlights the historical shifts, each of the canonized approaches mentioned above is still influential in the field. In order to provide a further discussion of this development, I will in the next part probe more deeply into some substantially grounded epistemological challenges.

As a premature conclusion we can state that the literature discussion so far gives indirect clues which help illuminate the research question. The established knowledge and existing perspectives in the field of leadership are still unable to directly produce knowledge on what leadership is, or on what should be perceived as good leadership, and it thus gives few direct answers as to how leadership could be integrated into developmental processes. As long as the field provides almost as many answers as there are theories, integrating and designing leadership development on the basis of knowledge from existing leadership research seems to be tantamount almost to a shot in the dark. Herein lays, then, one of the foundations for the overall argument in favour of a more action-oriented approach, one which combines the learning and knowledge production of leadership with means other

than the knowledge generated in the field of more traditional leadership research. As such, this glimpse into the main traditions of leadership research and some of the critique directed at it will function as a foundation and argument for a somewhat different approach. And through a more epistemologically oriented discussion on leadership, the ambition is to provide further basis for the action-oriented approach in the field of leadership research. The following part explores five such epistemological angles.

2.2 The Autonomous Field of Leadership Research

The field of leadership research is a theoretical and conceptual tradition whose main genealogy was established after the American Civil War. The historical and cultural background has its basis in the modern shareholder-owned enterprise, and as a research field it is basically concerned with the causal relationship of “how someone (makes someone) make someone do something” (e.g. as formulated in Sørhaug 2004); and as formulated in the attempt by Northouse (2004) to extract the common denominators from all the different categories of definitions, “*leadership is a process where an individual influences a group of individuals to achieve a common goal*”. As such a universally-oriented field, I will argue that the tradition has partly become isolated from its historical, cultural, and organizational context. My ambition in this part of the text is to identify and discuss the effects of this partial isolation of leadership studies, and the consequences of this isolation for knowledge production in leadership development; particularly in terms of how detached leadership research also affects its connection to organizational development. Consequently, the purpose of this part of the text is to discuss how dimensions of leadership studies are detached from other thematic areas of organizational theory – such as organizational change and development – and how this detachment affects the practical understanding and integration of leadership development and organizational development.

The argument in this part will build further upon the discussions in the previous part, and will be approached from five complementary angles. Taken together, the five angles constitute *the epistemological discussion* of leadership research, and they

connect the literature discussion to both the epistemological and the practical challenges of interventions, as well as to integrations with organizational development. The five angles are given the following headlines:

➤ Angle one: *Substantial Limitations in Leadership Research*

This angle elaborates on the principal difficulties of establishing a positive science on leadership due to substantial dimensions of leadership and authority as such.

➤ Angle two: *Leadership Development as a “Closed System” of Thinking*

This angle discusses the field of leadership development with a particular focus on the professional field of leadership development programs and its relative “closeness”, assessing the consequences this has for the development of integrated interventions.

➤ Angle three: *The Individual and Psychological Dimension*

This angle discusses the role of individuals and the effect of individuals on the surroundings – as opposed to the organization’s effects on individuals – and the implications of this aspect for integrated leadership development.

➤ Angle four: *A Practical and Empirical Dimension*

Angle four discusses the epistemological consequences of the empirical fact that there exists more literature and research on any given substantial organizational and leadership phenomenon, than it is practically possible to overview; and considers this particularly in terms of a fact for which the epistemological consequences have yet to be taken seriously.

➤ Angle five: *Knowledge Production and Validity*

Angle five discusses validity in relation to actionable knowledge, and particularly in relation to what looks like a negative correlation between the diffusion and application of research-based models on the one hand, and their support from traditional validity criteria on the other.

And to anticipate part of the summary of this discussion, all of these angles represent epistemological arguments for adding a more action and experientially-oriented knowledge-production strategy to the field of leadership research.

Angle One: Substantial Limitations in Leadership Research

The state of the research helps illustrate how the field of leadership knowledge is filled with paradoxes and complexities, and one of the epistemologically crucial dimensions is the lack of agreement on how to understand and define the concept of leadership. This lack of agreement has a far-reaching consequence: A large proportion of the leadership research, and especially the texts that tend to create overviews and reviews of the field, tends to start with a critique of the research for its lack of ability to create substantial knowledge on leadership. This argument is further linked to the large amount of different conceptual definitions and the lack of agreement on how to define leadership. Such critiques are essentially based on the common assumption that leadership research is fundamentally dependent on a clear definition of leadership. A significant proportion of the leadership research, as well as overview texts, starts with this kind of fundamental critique. Based on the same assumptions, it is common to criticize both explicitly and indirectly the fact that it is impossible to make any statement whatsoever about the field, while at the same time of course saying a lot about it.²⁷ This repetitive and fundamental critique from within also makes it tempting to apply the perspective of Kuhn(1962; 1996), interpreting this state of the field as a growing anomaly that is asking for a paradigmatic shift in the approach to leadership research.

One of many typical references and quotes reflecting this antagonism is found in Burns' (1978) classical writings on leadership, where he introduces the field with the conclusion that *leadership is among the most widely observed and least understood phenomena*. The statement seems to be just as valid today, and represents another main argument for a change in the epistemology of leadership research. The general solution, to make leadership research scientific through the creation of a clear and

²⁷ This observation is thoroughly discussed and analyzed by Sørhaug (2004) and represents a starting point for one of the most significant studies of the field of leadership research I have read so far. This is also one of the main inspirations for my line of argument in this text, and the reason for the continuous references to this book.

unique definition of leadership, seems to represent part of this problem. This claim is based on a particular view of the connection between definitions and their reference, or in other words, between language and reality. It presupposes a perspective where the social reality of leadership relates to language as if language does not affect the reality of leadership. This common lack of epistemological language-sensitivity is a general problem within social science, and it represents a specific problem for the studies of leadership. This is not to say that it is impossible to study central elements of leadership by using clear definitions. However, when one is looking for the essence of a topic – here leadership – and when it is possible illustrate that important parts of this essence has the ephemeral quality of a constant flux within paradoxes, it follows that approaches other than the fundamentalist/essentialist definition have to constitute the point of departure and the common grounds of leadership research.

A useful conceptualisation that serves to simplify this tendency can be illustrated through the use of a dichotomy or conceptual continuum from constitutive to reductive concepts (as also presented in the introduction and further applied in the analysis).²⁸ This divide or continuum can be said to partly “save” the approach social constructivism from the debates of eternal regressions and solipsistic relativism, and integrates the logic of social constructions closer with a material realism. It helps to establish a basic division between what constitute more purely socially and ideally constructed factors, and what constitute more materially fixed ones. Thus, by accepting and illustrating that language and concepts both create reality and refer to reality, one can bring constructivism a step further and make it stand on, or walk with, two feet.. This is done through the creation of a difference between concepts that do not directly affect what they refer to (*reductive concepts*), and concepts that by their use contribute towards changing the character of the (objects or) phenomena they refer to (*constitutive concepts*). Stereotypically, reductive concepts are descriptions of physical nature, while constitutive concepts typically refer to social nature and systems – but there are exceptions to this rule. Examples of typically constitutive concepts can be found in vocabulary that both describes people and at the same

²⁸ This continuum is inspired by a dichotomy established by Hackin (1999), and applied in Sørhaug (2004) between indifferent and interactive concepts, and where interactive concepts contribute towards changing the character of what they refer to, whereas indifferent concepts simply refer. I have particular problems with the idealized understanding of indifferent concepts – as simply referring – and through the use of Luhman (1995) I prefer to apply the description reductive to such concepts, in the sense that they primarily reduce complexity by their references.

time contributes to their stigmatisation, where the stigmatisation then refers to a social construction of identity; as for example in diagnostic terms and categorizations that contribute towards self-fulfilling changes in people's self-conceptions.²⁹ In this sense, constitutive concepts are to be understood not only as terms with a reference in reality, but also as terms that interact with whatever they refer to.³⁰ Hence, constitutive concepts are also crucial for understanding self-fulfilling and dynamic social phenomena in general. Many concepts used in leadership research can easily be illustrated as constitutive in this sense, and as such they necessarily bring elements of social construction into their understanding. The most intuitively present of these concepts is that of charisma, and the constitution of motivation (normally short-term) based on charismatic leadership action. Another recent relevant example of a constitutive concept that produces reality is the Danish drawings of Mohammed, and the rather physical production of reality constituted and created by their publication...

Within this line of reasoning, between constitutive and reductive concepts, one can also interpret and understand the difficult relation between a search for fixed definitions of leadership, and the realities of leadership. By looking at some common themes in the substantial content of leadership practice one can further understand why the fixation of a definition is impossible, and why a definition partly works as a constitutive concept that contributes towards changing its reference, and thereby its legitimisation – per definition. As such the introduction of constitutive concepts can help us understand why the incessant search for a fixed and ultimate definition is deemed to fail.

For example, one of the more generic and common – and rather un-controversial – dimensions of the substantial content of leadership is connected to the regulation of organizational boundaries, and to the contribution to organizational unity by connections and demarcations on intra- and extra- organizational relations (e.g.

²⁹ And from the field of organizational research the famous “Hawthorne-effect” (Dickson et. al 1966) can be interpreted as resulting from the constitutive concepts of the experimental setting.

³⁰ Some, particularly constructivists, would argue that all concepts are by definition constitutive, affecting the meaning of what they refer to. This partly connects to a larger philosophical debate on the relationship between language and reality, and will not be fully dealt with here. But I will contend for the purpose of the present argument that the distinction helps us to understand the constitutive effect of both leadership descriptions and leadership actions.

Emery & Thorsrud, 1976; Emery & Trist, 1974; Sørhaug, 2004). In other words, leadership is then conceptualised and understood as complexity reduction and as part of the constitution of social sub-systems that form organizations. If leadership is seen as a boundary and demarcation concept, then clear definitions will necessarily create instable definitions, if one tries to use them to capture the essence of leadership. The boundaries and demarcations are – by definition – never clear and unambiguous, and in any practical setting they are subject to a process of continuous negotiations between paradoxical forces of influence. In the figure below I list some examples of dimensions of principle from the field of leadership substance. They are examples of the paradoxical setting within which leadership and organizations are “always-already” situated, and at the same time paradoxes that constitute and produce leadership. As such they contribute to more substantially and “empirically” illustrating the problems of principle associated with seeking to establish, through research, substantial definitions of leadership:

Some examples of typical paradoxical dimensions related to the essence of leadership practice	
VS.	
Individual needs	Collective needs
Centralized concerns	Local (decentral) concerns
Short-term perspectives	Long-term perspectives
Feelings and emotions	Reason and rationality
Organizational rules	Situational exceptions
Organizational descriptions	Practical interpretations
Powerful	Powerless
Open systems	Closed systems
Values and norms	Economic concerns
Steering and control	Trust and responsibility

The list could have been a lot longer, and as a paradox in its own right, it illustrates substantial dimensions that define the field of leadership, and which make it fruitless

to look for clear and unambiguous concepts and definitions. And again, just conducting some more research to find better definitions will never end in a fruitful solution, even though many researchers in the field follow that strategy. Thus, it is necessary to construct research practices that incorporate and handle these paradoxical and constitutive dimensions of leadership. The combination of a substantial paradoxical nature of leadership, and identification of leadership in terms of constitutive concepts, can thus help us understand the massive projections and symbolic power that are connected to people of authority. The massive set of reality-constructions, able for instance to at the same time create both “hero” constructions and “scapegoats”, makes it even clearer that there are no direct links to a defined reality in this field, and that most descriptions and definitions of leadership are naturally of a constitutive nature.³¹

To sum up this first angle, there is little reason to try to map the established empirical body of knowledge within the field of leadership studies, and thereby to identify gaps in a well-defined knowledge base. *A more useful approach, rather, seems to be to identify the search for definitions of leadership as the anomaly and “the gap” in the field.*

If this is so, it indicates that research on topics related to the themes and substance of leadership will not necessarily be of any direct use for the practical field of leadership development; nor will it contribute to its integration with organizational development. Generally speaking, it indicates that development as a leader is not accomplished by acquiring the present research-based knowledge on leadership, but rather through the creation of mastering mechanisms for dealing with constitutive

³¹ The concept of leadership seems to be infected by highly ideological interactivity also in the area of social science, and seems sometimes to constitute a pariah, as do symbolisms. In an environment of social scientists one can experience scepticism in studying leadership at all, and much more symbolic credit is given if the focus of study is on those affected by leadership. There seems to exist a critical perspective with a tendency to treat leadership as something suspect, as expressions of a ritual norm of “kicking upwards”, and a cultural bias against people of power. Rather than creating systematic reflections on the complexity of leadership, and the necessity of participation for leadership to be possible, this common ethos can also be said to contribute to the detachment of the field. A critical perspective on leadership and power is of course both necessary and legitimate, but when it becomes a unilateral and one-dimensional activity it will not help bring the knowledge base any further. In some other traditions, for example the more business-oriented literature and research, the opposite seems to be the case, with an over-construction of the leader as “hero” and the one who takes responsibility for and not from the rest. Both approaches illustrate that leadership is always interwoven with a high degree of reality production, and the research field itself displays the paradox of dealing with leadership as a one-dimensional approach.

paradoxes. The argument about the detachment of leadership research can be further explored through the more practical field of leadership development, by identifying its practice as a partly “closed system” of individually-oriented thinking.

Angle Two: Leadership Development as a “Closed System” of Thinking

One way to frame the field of leadership development is to see what kind of historical and contextual tradition it is a part of, thereby to place it in an overall contextual scheme. Initially, this can imply framing the nature of leadership development within the “modernity” discourse of work organization (as found in Lash, 1999; Beck et al, 1994.; Østerberg, 1999).³² In this discourse, and especially the parts covering “work organization”, one can identify and follow a shift in the use of metaphors. Stylistically speaking, the shift is parallel to the shift in the perception of leadership – as it goes from causal relations to transformative ones – and it can be described as a tendency to gradually open the metaphors applied to describe organizations, and to go from machine-like metaphors illustrating the system thinking – where organizations are fixed structures that transform input into output – and toward metaphors suggesting a more integrated structure. An example of the latter is the “almighty” and popular use of the network metaphor of today, which is applied to give structure to everything from personal and individual networks of acquaintances, to professional networks of employees or leaders, networks of teams and project groups, networks and clusters of enterprises, networks of regions and cities; and it is even applied as a general description of fundamental developmental traits in society as such (as used e.g. in Castell’s “The Rise of the Network Society”, 1996). This part of the text seeks to discuss the development of more open and dynamic metaphors for organisations, and to apply these to characterize the field of leadership development, as it needs bringing up-to-date on this development.

³² The discourse of “modernity” is a large and well-established discourse, and a substantial field of analysis in social sciences. As such, it focuses particularly on later historical changes, and also on the division into variations of post-modern perspectives. It is important to keep in mind that the very limited aspect covered here has no ambition beyond providing a limited idea-historical framework for the field of leadership development in order to support the overall argument; it is not at all meant as an attempt to give a fair representation of this well-established academic discourse.

The practical tradition of leadership development and its developmental programs, on the other hand, has traits that work as an exception to this development toward a more open conceptualisation³³. It can be argued that through their focus on the development of individual dimensions of leadership, parts of the discipline of leadership development, and particularly its institutions (such as the traditional programs run by AFF in Norway, and Centre for Creative Leadership (CCL), on a more international scale), are captured in a closed system of thinking that is partly detached from the field of organizational development and its change of metaphors. For example, institutionalized leadership development efforts normally contain a main focus on the individual leader's development, and often operate rather detached from development of the organizational and cultural context in which the leader is situated. The professional literature in the field also confirms such a tendency – for instance, one of the authoritative books in the field, the “CCL Handbook of Leadership Development”, concludes that further integration of individual and organizational development is needed for the future (Mc Cauley & Van Velsor et. al, 2004). In short, development of the particular organization outside the programs, as a practical field, or the organization as a social and collective whole, have not to any considerable extent constituted the premises for the design of traditional open leadership programs (ibid). This is not a clear-cut division, or one without exceptions, but it points in the direction of a shift, or addition, to the field's existing way of thinking, indicating a more integrated focus of leadership development; one which would identify and expand the field of leadership development in terms of more open metaphors that are more closely integrated with other topics of organizational change.

Through the modern history of organizational theory – often in the history of ideas denominated “Modernity” – the organization and division of labour can be read along the two dimensions of *differentiation* and *specialization* (in Østerberg, 1999). As part of a conceptualisation suited for a “modern” analysis, organization theories have tended to be rooted in bureaucratic models, with their emphasis on hierarchical control, vertical communication, distinct functional divisions, discipline-based

³³ To frame the field of leadership development as a “closed system” was as a metaphor introduced by the project manager (Øystein Fossen) through discussions on more “integrated leadership development” approaches. For my part, this introduction has also fostered a conceptual scheme later applied to demarcate integrated leadership development with “traditional” leadership development, and as such it is constitutive for parts of the overall text.

specialization, and rule-based, rational decision making processes. Such hallmarks can be found in many theoretical contributions, and are archetypically attributed to Weber's (1920; 2000) organizational writing on bureaucracy and Taylor's (1911; 2006) more practical and manufacturing-oriented "The Principles of Scientific Management". These theories have later been massively criticized – almost as ritually so as positivism – and it seems that through a cultural-historical ignorance they have been reduced to one-dimensional and naïve thoughts from the beginning of "Modern Times". (However, e.g. Weber's (1920; 2000) three-dimensional divide on legitimisation of authority could on the contrary be interpreted in rather "post-modern" terms, in the sense that it opens up the possibility for parallel and qualitatively different rationalities in the understanding of leadership. See part 4.6 for elaboration).

In later theoretical contributions, differentiation and specialization is framed in more systemic terms, as conceptually found in theories about social systems (e.g. Luhman, 1995), and similar conceptualisation is also often to be found in socio-technical systems theory (e.g. Emery, 1968). Although systemic thinking is still popular, over the past decades, alternative, and even more cross-disciplinary, theories seem to have created the ruling metaphors. As mentioned, the recent hegemonic metaphors in the network family can work as examples (as e.g. in Castells, 1996; 2001). Such a continuous "opening" of the metaphors used to understand organizations can serve as a historical background for exploring new ground in the field of leadership development.³⁴ Within this theoretical conceptualisation of the traditional differentiation of labour into specialist fields and professions, where *leadership development can be seen both as one such tradition and as a profession*, it can be argued that the tradition has reached some self-referential limits and is lagging behind in a closed system, and as a detached and "differentiation and specialization"-driven conceptualisation.

Traditions in the organizational field are continuously affected by the development within other societal dimensions, particularly development within the forms of production, and new forms of crossover integrations are created. Leadership

³⁴ One possible explanation for the popularity of "network" metaphors might be that the specialization of knowledge in most professional disciplines has come so far that the main challenge in most organizations today, and also a general leadership challenge, seems to be to coordinate and integrate the many different specialist fields.

research can in this picture be interpreted as a projection of other cultural trends connected to authority. In a more Marxist-inspired perspective, the changes within the means and mechanisms of production influence organizational aspects, and the understanding of ownership and control is challenged when for instance knowledge takes on the role of capital. In this sense, leadership development is connected to general societal development. The opening-up of metaphors used and the recent popularity of the network metaphors can serve as examples of an integrative approach in this picture, connecting the individual to the organizations to an even greater extent than what is found in e.g. socio-technical and systemic approaches.

The language and theories about “network” (Castells, 1996) – and for that matter some of the associated action research metaphors, such as “development coalitions” (e.g. Ennals & Gustavsen, 1999) – picture new kinds of connections and syntheses across differentiated disciplines and institutions.³⁵ Although such “network metaphors” are today almost an all-encompassing trend, the tradition of *leadership development*, with its persisting focus on individual development, seems to be just in the initial phases of being affected by the general opening of this metaphoric conceptualisation. Thus, there is an enormous contrast and gap between the hegemonic role enjoyed by metaphors such as “the organizational network” in parts of the organizational literature, and their absence in the conceptualisation of leadership development.

It is not the intention here to argue for the salvational force of open concepts, but rather to use it as one among several parallel metaphors and rationalities useful for understanding the field of leadership development.³⁶ The profession of leadership development, and its traditional and continuous focus on the individual leader – i.e. the individual leader’s personal growth and relational maturation – can in this way be framed as a partly “closed system of thinking”. As a temporary summation, we can state that the development and opening-up of metaphors observed in organizational

³⁵ But the terms “Network” and “Development Coalition” are both used in different ways, and without one singular meaning.

³⁶ The opening-up of metaphors and the related organization of work can just as well be judged upon their negative effects: It still remains to be seen what will be the long-term consequences. However, meeting new and stronger demands for change and innovation by organizing into networks, also means destabilizing institutional and social structures. One consequence might be that leadership experiences more overload as a function in weaker organizational structures; another consequence might be to increase the load carried by the individual employee; a third alternative is that both of these will materialize.

theory towards a wider integration and new structures of disciplines and function, could benefit from being more closely related to the practical profession of leadership development. The term “integrated leadership development” which is adopted and explored in the rest of this text is an overall normative attempt to make a further contribution in this direction.

Angle Three: The Individual and Psychological Dimension

Discussions on leadership development and leadership research necessarily bring the individual subject, the leader, into focus. In opposition to many other social science approaches, where the social structures’ influence on the individual is at the core, the sound study of leadership forces us to also integrate the opposite perspective, namely the individual’s influence on the social structures. The argument explored in this section is about dimensions connected to this gestalt shift of figure and ground. When we search for theoretical reasoning connected to the integration of leadership development and organizational development, it is necessary to be aware of these parallel perspectives of inquiry. As a connection to a larger epistemological debate in social science we can rhetorically ask a series of questions: Is the social system best understood as a sum of its individual parts?³⁷ Or are social systems best understood as emergent structures and something qualitatively different from the sum of its parts?³⁸ Or is begging this question a false fundament – should we look for a third approach rejecting the divide between the social and the individual and focus of the relational interaction?³⁹ Or are such “either-or” questions merely theoretical constructions of no relevance for the practical integration of leadership- and organizational development?

The epistemological nature of such questions makes it impossible to provide direct answers; but there are reasons for exploring some elements of this discussion, as it connects to the understanding of leadership development, and to how the “individual-social” dimension becomes relevant when we seek to integrate individual (i.e.

³⁷ A position often denominated methodological individualism and often ascribed to Popper and Weber.

³⁸ A position often ascribed to a “Durkheimian” perspective and in various forms denominated structuralism.

³⁹ As is the case for most of recent social constructivist approaches (e.g. Gergen, 1994), as well as for Luhman’s (1995) theory of social systems.

leadership) development with social (i.e. organizational) development. I will first explore some immanent parts of the leadership role and see how these parts connect to this debate. As discussed above, people with roles of power and authority provide particularly good examples of how language and reality is connected by and through actions: Basically, people in these roles act through the use language and symbols, and whenever something is stated, a language act are produced.⁴⁰ At the same time, it is relatively easily observed that leadership as a practice both attracts immense attention, and at the same time works as an emotional target for both social and individual projections and attributions. This is even more so than for most other people, due to a complex set of reasons; and for this purpose, due to some fundamental dimensions of the leadership role: According to a “decisionist” perspective,⁴¹ decisions in organizations are made through more or less structured social processes. And ultimately, there are no basic or fundamental rules for how the essential rules of decision-making should apply, and at the end of the hierarchical or organizational line, the leader is theoretically a guarantor for organizational direction. When the (otherwise and usually preferable and democratic) dialogue fails, leadership is both in principle and for most practical situations, given meaning through such a guarantee of direction. By this definition, leadership becomes a function for handling *exceptions and resistance*, for instance when the situation demands exceptions from the norm of participation, when democratic processes fail, or when a preferred organizational direction meets resistance.. Leadership, then, is the “x-factor” which is not covered by the structuring forces of organizational rules, procedures, steering systems, handbooks, work processes, best practices, and other documented regulations.

In this picture, leadership is fundamentally the structural role that provides guarantees when the normal rules and structures of the organization do not apply. Within a “decisionist” perspective, as in life itself, it is not possible to find definite

⁴⁰ This phenomenon does of course apply to most people, but since the attributed consequences are often of greater impact when the person is in the role of a leader, it is even more easily observed among leaders and figures of authority.

⁴¹ A perspective often connected to an anti-democratic tradition and associated with the rather dark sides of Carl Schmidt’s theories, and a perspective responsible for the development of the totalitarian epochs of the European history. My purpose here is to connect the individual leader to one of the many paradoxical parts of the leadership role, among which “decisionism” is one of several, and where in principle, the role of the leader is to be the guarantor for action and direction in situations structured by exceptions and resistance. This part of the leadership role is also thoroughly discussed in Sørhaug (2004).

criteria for how these fundamental rules are made, and in the end one literally needs some kind of fixation point.⁴² The fixation point of organizations is sometimes the leader, or a hero, and if these fail, some might even look for a God to set the basic rules – or alternatively a scapegoat if the rule generates failure or too much personal stress and anxiety. Within such a perspective it is again possible to state that baked into the very concept of leadership, as a guaranteed principle, there is in the end no final way to define and describe the practicalities of leadership. If leadership is a matter of handling deviations and exceptions, we can establish arguments for why it is by definition a paradoxical activity to capture or to identify the essence of leadership in a one-dimensional manner. In Sørhaug (2004) we can find an analogue argument in that this kind of reasoning is used to explain that in the end, authority has fundamental traits of *self-explaining* and *self-legitimizing* logics, and that it thus tends to draw back from scientific investigation.⁴³

Such reasoning through the investigation of leadership paradoxes can also contribute towards explaining the great visibility of the individual leader and her enormous role in the generating of the symbolic construction. It is difficult, or perhaps even impossible, to consciously manage and cope with all the paradoxes constituted within leadership - and the consequence is that in principle, it is impossible to establish sound or scientific arguments for leadership, or scientific arguments and legitimization of authority. The “fixation point”, then, cannot be established directly through arguments or documentation, but only indirectly, e.g. as ultimately self-referential individuals. It contributes to the understanding that leadership is both inevitable in and a dangerous challenge for democracy. In an everyday organizational setting distinguished by a complex flow of paradoxes, what emerges as a “visible” point of fixation is the individual leader.⁴⁴ Thus, leadership represents a

⁴² Philosophically and practically we will never find rules for how the rules in organizations are established – but sometimes we will find pointers. And if we see the construction of meaningful actions as a product of following rules (from Wittgenstein, 1953; 1997), it is impossible to find the final rule for how meaning is created; and leadership studies thus have to be even more aware of the epistemological point connected to the relation between symbols and actions, or language and reality.

⁴³ To create clarity of meaning in a setting blurred by paradoxes one can also imagine that concepts and metaphors which help to sort the complexity are more useful, and thus more widely disseminated and used than the ones of scientific significance. If this is the case it also helps explain the phenomenon of qualitatively different validity criteria discussed in the next part.

⁴⁴ A similar inference is established in the psychological research on attribution directed to individuals, for instance connected to what goes under the name “fundamental attribution error”, which refers to a general

sub-system of complexity-reduction in organizations, and serves a constitutive role in relation to other systems and rationalities, as well as vice versa.

Emotionally, existentially and epistemologically, it is impossible to endure in the long run a conceptualization of the surroundings, or of the organization, that is too complex or chaotic. It is well documented in psychological research (e.g. Seligman, 1992) that chaos and lack of predictability can be extremely stressful, and lead to both depressions and psychosis. This again generates a situation where social constructions of heroic or scapegoat attributes are easily produced as perceptual relievers; especially in a situation where emotional and psychological relations to authority, together with existential coping with paradoxes, influence the epistemology of knowledge production – which in this case is the construction of the leadership role. Leadership understood as complexity-reduction also illustrates that this kind of personal construction cannot simply be rejected as a social construction disconnected from material reality, which would amount to interpreting the individual leader as an organizational “placebo”. As most people will have experienced, it normally matters who the individual leader is, and she can make both a violent mess or create a positive difference “merely” through the use of more or less personal symbols – normally words and speech acts. Hence, we can state that as a necessity, the concept of leadership is symbolically potent, it contains expressions of material reality, and it is heavily produced as and through “constitutive concepts”.

Such paradoxes and complexities of leadership studies may contribute to what seems like an epistemological uneasiness in social science: Within sociologically oriented attempts to capture the field, the focus has mainly been upon social processes and structural influences on individuals. And as mentioned, the leadership research identifies central dimensions in the theoretical debate on ontological individualism and social structures. In contrast, within studies in psychology, and especially social psychology, the opposite has normally been the case. Some of the most famous studies of authority and influence in psychology, for instance Milgram’s (1975) famous studies on obedience to authority, investigate leadership and authority

everyday tendency of over-attributing causes of incidences to persons, and similarly overlooking the situational factors (e.g. as referred in Hewstone, 1989).

as an independent variable, and proceed to assess its influence on social structures.⁴⁵

A similar one-sided approach to social systems also seems to dominate the theoretical parts of Action Research on leadership. If we look into how Action Research deals with the field of leadership, it is apparent that the perspective of individual influence is largely absent. With a few exceptions – such as Peter Reason’s (2001) conceptualization of a “first person” approach, and sometimes in discussions of the role of the researcher – the role of the individual as a general point of interest worthy of study has almost disappeared. This is even more apparent if one looks into how parts of the action oriented approaches deal with leadership. If one looks into standard textbooks of AR (such as “The Handbook of Action Research”, Reason and Bradbury, 2001), for instance, it becomes clear that the topic of leadership as a distinctive field is simply not a part of organizational studies. And along the same lines, the study of leadership and leadership interventions seems to have been relegated into the background in relation to establishing participation-based intervention methodology. Against this background, one may speculate whether the ideological focus on participation has contributed to the disregard for what seems like one of the vital dimensions for sustained participation. An example from *The Handbook of Action Research* may serve to illustrate this point: Among a total of more than 450 pages, about 200 pages deal explicitly with the topic of participation, whereas 5 pages are devoted to explicitly dealing with leadership,⁴⁶ Similar proportions are found in the main journals of action research.

This apparent lack of references to the topic of leadership also has another interesting exception in this referential book: In his article on the founding of Action Research, William Pasmore (2001) refers to one of Kurt Lewin’s famous field experiments on group performance. These experiments made apparent that only democratic groups exhibited both high productivity and low conflict level. In the experiments, the leadership styles involved differed between what Lewin named “*Autocratic, laissez fair, and democratic*” styles. The study provided overall

⁴⁵ This uneasiness may also have contributed to the experiment’s ability to foster ethical provocations, and to its widespread use in the discourses of research ethics.

⁴⁶ Moreover, it is tempting to speculate on the coercive dimensions of political correctness in AR, since the 5 pages concern one single case on Female African-American Community Leaders.

confirmation of Lewin's field theory ($B = f(p, e)$), and explicitly supported his assumption that leadership style was more important for predicting group behaviour than personality and the background of group members. Such insights provided the fundamental backdrops for the development of a socio-technical school and of Action Research.⁴⁷

In the Norwegian and Scandinavian context, where Einar Thorsrud played an important role in the establishment of normative development and action-oriented research, the picture is somewhat different. But in the main dimension, based on the theoretical grounding of socio-technical system theory (Emery and Thorsrud, 1976; Emery et al. 1974), where organization is designed through the interdependence, relations and demarcations of tasks and people and their basic needs, we find a unilateral focus on social and technical processes. And the organizing principles are more dependent and derived from the nature of the tasks rather than from any specific idea about individuals in leadership, hierarchy, or organizational models.⁴⁸ Naturally, Emery and Thorsrud (1976) treat the leadership role in relations to its possibilities to support democratization of industrial organizations, and leadership is (as mentioned above) conceptualized as "*boundary regulations*". Emery and Thorsrud also foresaw that organizational flexibility and continuous learning on the shop floor level would necessarily change the characteristics and role of front line leadership. They formulated a vision where the role of the front line leader would gradually change from supervision and steering of machines and employees, toward a focus on management by objectives and the development of human, financial and material resources. In short, they foresaw a development that was going to become a momentous trend both in general, and for the large system of this study – and maybe even worldwide – and they foresaw it more than twenty years before it happened.

⁴⁷ I addressed this kind of objection in a dialogue with Peter Reason, one of the editors of "The Handbook", at a meeting in Bath in 2005. His response was in line with my overall reasoning: He basically said that he was surprised by the absence, and that it was probably connected to the dominant focus on social processes and constructions.

⁴⁸ In Sørhaug (1996), "*On Leadership – Power and Trust in Modern Organizing*" (my translation), Thorsrud's approach to leadership is compared and contrasted to that of the American George Kenning – whose theory was widespread in Norway at the time – and an analogue point is made: In short, George Kenning's management concepts were focused on the individual leader and his individual responsibility, namely the hierarchical line and decisions; whereas Thorsrud focused on the social and technical structures of tasks, participation, community, systems and boundary regulation.

Despite this foresight, the lack of focus and development on front line and middle manager levels is one of the main established arguments seeking to explain why the experiences from the Norwegian “collaboration experiments” – which were based on new forms of collaboration between the employers’ federations and the trade unions in the nineteen sixties – were not able to spread and diffuse as much as intended. The front line and middle managers were seen as the bottleneck in a process well anchored in both top managers and unions, as they were squeezed between development on the top and the shop floor levels in the organizations (according to Herbst, 1976). In this context we can state that in the sixties and seventies – as is the case for many Action Research projects of today – the main goal and focus was to enrich and develop the work processes through an effective socio-technical systems theory and a democratic value system. In terms of practical development projects, the researchers focussed on the need for top management support, protection and interest; and despite awareness of the crucial role of front line leaders and foremen, developmental activities failed to include this particular group in the development target (Sørhaug, 1996). Based on this historical narrative, we can situate the integration of leadership development and organizational development in this text at least partly as a continuation of Thorsrud’s foresight, and conceptualise the Reflexive Machinery (part 4) as a field experiment based on similar challenges identified in previous interventions.

This history gives reasons to believe that what seems to constitute a bias against important dimensions of leadership in the field of Action Research could be amended if the individual’s influence on social structures, as well as the role of leadership development in participatory processes, were added to its concerns. For me, these constitute some of the main arguments for bringing leadership studies and interventions back where they belong: Into the pragmatic and action-oriented approaches of participation-based development. To “bring them back” also means to establish a parallel conceptualization of both social structures and individual influence.⁴⁹

⁴⁹ Although there are few distinct leadership discussions in this literature, this is not the case for practical interventions, where the role of the leaders was well acknowledged Einar Thorsrud was – according to what I have been told – also part of the establishment of the Norwegian Solstrand program for leaders; an open leadership development program directed toward top-management, and still running as a central program today.

At the same time, there is an argument for bringing in a parallel focus of research based on the individual, and particularly approaches focussed on individual and psychological dimensions dealing with attribution and authority, and their effect on practical group interventions. It can be argued, then, that more systematic reflection on the role of the individual in social processes is needed in the field of Action Research, where systematic reflection on action is at the core of knowledge production. The connection and integration of leadership development and organizational development may be one way of dealing with this need.

The ambition of this part was to argue that implicit in the theoretical functions of leadership we can identify a paradox in the sense that the definitions of leadership cannot be identified and established scientifically. At the same time, many social scientific approaches lack the perspective of individual influence, and some of the action-oriented approaches seem to be amongst them. Connected to the research question then, both of these lines of reasoning – the focus on the individual and the ultimate self-legitimation of leadership – can be read as arguments for a closer integration of leadership and organization in action-oriented research processes.

Angle Four: A Practical and Empirical Dimension

Almost needless to state, it is simple to empirically illustrate that more texts have been published on the topic of leadership than one person can possibly hope to read in an entire lifetime. Simple computer searches in the field of leadership theory show that the production of various texts, articles and books takes place at a daily pace that makes it physically impossible to take the role of a renaissance scholar, or create a “birds eye perspective”, and gain an overview of the field. At the same time, the general ambition to create a more unified definition for understanding leadership is not getting closer to realization. As shown above, there are epistemological and empirical reasons for why this is the case, and for why matters are likely to stay that way. Thus, even if, in principle, one wanted to achieve such a unified definition, it would be practically impossible. It may well be of practical consequences that one is not able to overview the textual knowledge production of the field, but I will argue that this is not seriously reflected in an epistemological sense. The ambition of this angle is to make a point of how these two lines of reasoning – lack of definitions and the

practical and principal problems of overview –should both be taken into account epistemologically when one wants to deal with action-oriented leadership research.

The fact that more texts have been produced in the field of leadership research than one person can possibly read, or gain a sound overview of, is easy to illustrate and is a rather well recognized phenomenon today. However, even though this is well recognized, its actual epistemological consequences are not explored to any significant degree in the literature, and even less so in practical inquiries. There are probably many reasons for this neglect of the problem, and one speculation might be that one has to break the heavy academic norm of professional overviews, where the ruling doctrine seems to be to “identify gaps in the body of knowledge”, and “admit” their limited validity. Rather the opposite tends to be the normal case. The overviews try to be just that – overviews of the field, often along the same narrative line as presented above, but without any epistemological discussion on the consequences of the practical impossibility of gaining such an overview. The argument here is of course not supposed to provide an excuse for skipping the reading of textbooks about leadership; my point, rather, is that the consequences of this simple fact are often neglected or hidden in the academic game of literature reviews and discussions.

For instance, the assumption that it is in principle possible to identify a “body of knowledge” which constitutes the field of leadership research, seems to provide a basis for this activity. Identifying “a body of knowledge” is only possible, however, if one believes in the massive play of words and efforts to create “a definition of leadership”; which then in turn is accepted as a foundation upon which we can lay the new bricks of knowledge – as if the metaphor of “building with bricks of knowledge” is the most prescriptive metaphor for bringing leadership research further. In terms of validity, these beliefs seem to be at least questionable, as they are, firstly, disconnected from any material reality or practical possibility; and as, secondly, this “body of knowledge” or its presupposed “definition” is not established or to be found anywhere; and as thirdly, and importantly for action-oriented research, the attempts so far are, as shown in the introduction of the field, rather useless for practical application.

It could also be empirically demonstrated that many of the better contributions to a “body of knowledge” come from elements and approaches introduced from other fields or disciplines, from other systems of thinking, or other paradigms. This could be conceptualized according to the famous dispute between Popper (1959; 2002) and Kuhn (1962: 1996) and their theories of scientific development; or in short, as a replacing of a Popperian stereotype of “adding bricks of knowledge on knowledge” through the falsification of hypothesis, with a Kuhnian epistemology of taking the many “anomalies seriously and creating a paradigmatic shift”. And as shown, the anomalies in the field of leadership research are many, and as deconstructions they are produced from within, and in sum they ask for a paradigmatic shift. One of the possible strategies, then, might be to bring leadership studies back into the mainstream of action-oriented research, or, and thereby, bringing leadership development back into its integration with organizational development. Even though literature overviews seem to be a mandatory academic process, it follows that mapping the “body of knowledge” is not necessarily the best point of departure for a literature discussion if one wants to make a contribution to a field. This argument is not meant to be mis-conceptualised as an argument against literature reviews, nor is it my intention to say that they are useless; my point is to highlight that they often do not build on the epistemological assumptions they presuppose.

This claim is also supported by the large discussion connected to an emerging and more socially disposed mode of knowledge production, and by the apparent need for both new research practices as well as new ways of conceptualizing knowledge production. This becomes particularly obvious when a larger part of the production processes become depend on both social and technical research and innovation. The consequence is that research and knowledge production are conducted in other ways and by other institutions and other means than what has traditionally been the case, e.g. by being moved from research institutes and universities to be replaced by research-intensive production in organizations. Consequently, the diffusion and production of knowledge changes, and this also affects the ways of knowing, and what constitutes valid knowledge, and of course the shape of the “body of knowledge” (e.g. as found in the widespread discussions connected to Nowotny et al. 2001; and in the writings of “Re-thinking Science”).

Rather than to re-construct and strengthen the belief that all we need to do, is conduct some more research, or some more of the same knowledge production, or to stand on the shoulders of a sum of existing theories in the field, I will argue that the challenges discussed so far provide strong arguments for a shift in perspective, and that we need to look for gaps in practices rather than in the research literature and reviews. To re-quote Geertz (1973; found in Elden and Levin, 1980):

“If you want to understand what a science is you should look in the first instance not at its theories or findings and certainly not at what its apologists say about it; you should look at what practitioners of it do.”

When it comes to practical interventions and methods for the integration of leadership development into organizational development, my reasoning may give some indirect guidance for how and why to integrate leadership development and organizational development. For instance, it implies that installing communities of systematic reflection on relevant leadership knowledge, experience, fashion, fads, concepts, and actions, may represent a better methodology than trying to teach leadership based on an overview of the research in the field, as is the approach of, for instance, so many management schools and programs. If one interprets new knowledge either as another brick to be fitted into a gap, or as a new perspective to be developed, either one naturally connects to a parallel and large debate on what is valid and reliable knowledge. For the purpose of the analyses of part 4 I will connect to the reasoning above and build the argument further toward an extension and shift of the criteria for validity, from the traditional ones connected to generalization of knowledge, towards more pragmatic and generic criteria of workability.

Angle Five: Knowledge Production and Validity

The above discussion of common challenges in leadership research can easily lead to a disillusion about doing research on leadership. Eventually, if the traditional validity definition is to be applied, to the conclusion that there exists no valid method for knowledge production connected to leadership. If this is so, it represents a major

paradoxical gap between the critique of research and the more general and everyday experience of most people, and similarly, a gap between the research and the content of well received leadership training programs. Both the immanent and the outsider critique of “canons” of research approaches presented in the introduction basically end with the conclusion that we cannot say much about what leadership is, or about what constitute its causal effects. At the same time the general experience is rather the opposite both amongst leaders and others. It is simply the fact that we know a lot about leadership and we frequently experience its effects. As the argument goes, the challenge seems to be that through lack of epistemological sensitivity the research has become detached from its field of study, and detached from the world of common and practical experiences.

It is particularly illustrative for the state of leadership research that the most thoroughly documented theories within the existing paradigm lack practical diffusion, and are seen as useless; while the most widespread and applicable ones are rarely supported by existing methodology for knowledge production in the field. This paradox points towards a knowledge production where experience based learning – such as systematic reflections in and on actions – is also acknowledged as representing added and valid value. And if the consequence is that knowledge production on leadership has to be more analogous to experiential learning on leadership, the conceptualisation of validity partly needs to be reconstructed. Some basic reasoning connected to this kind of change is what I try to touch upon through this angle. I will apply it in the analysis, but only after delving quickly into the concept of validity.

A dimension that connects this to the discussion on validity of leadership research is the dimension of complexity and complex concepts, versus simplicity and simple models – or the degree of complexity reduction and its relation to validity. In short we can say that the normal relation between reliability and validity is a zero sum game. The research dilemma is its eternal and internal dynamic; when reliability increases, by definition the validity decreases, and vice versa. Within the traditional perspective on validity, this definition seems to be true also for leadership research, and the normal rule of the field is: When the theory or models score high on validity, they tend to be more context and situation dependent, and emerge as local theory; and when

they score high on reliability the contextual and local sensitivity is gone, and they become detached from, and sometimes too general to be valid in, particular contexts. In parallel, when the complexity of the model increases, as in the example from Yukl (1994; 2006) above, it scores higher on validity, and lower on reliability. Furthermore, the simpler generic models are normally more suitable for generalization and less connected to context, and at the same time they often become too general to be able to explain the specific context. A third strategy to transcend this dichotomy might be, then, to see the sum of reliability and validity more as a degree of usefulness – in the sense that it contributes towards developing experience in terms of workability – rather than as a degree of local or general description.

Thus, and as a much of the literature and research empirically exemplifies, the field of leadership theory and practice can be approached from a practically infinite number of perspectives. Within a great range of epistemological approaches one can in turn choose from a long list of methodological approaches. Everything from extreme realism and objectivism to radical constructivism and idealism can be identified as applied strategies. One could conduct literature studies, philosophical studies, historical studies, anthropological studies, sociological studies, psychological studies, social economical studies, strategy studies, and pedagogical studies, to mention a few of the common disciplines dealing with leadership. Or one could enter into the more thematic areas such as feminist and gender studies, power studies, democracy studies, innovation studies, complexity studies, critical studies, developmental studies, sustainability studies, work environment studies, labour relation studies, political studies, efficiency oriented studies, psychoanalytic studies, to mention a few of the available options for dealing with leadership in an academic context. Furthermore, under each of these labels there exist from a couple of dozen up to hundreds of approaches, definitions and disputes.

What, then, is validity? If we consult everyday language, we find that for statements, descriptions and explanations, their validity is connected to how well supported they are by different sets of experienced evidence, or simply to given characteristics which can be criticised and investigated without being rejected. In general and abstract terms, then, validity is knowledge – either practical or theoretical – that in some way makes available enhanced understanding, compared to just any coincidental opinion

or belief. Validity is thus what is worth believing in a case, and consequently both normative and argumentative. It can cover different sets of knowledge, from what is aesthetically valid as beauty to what is fair and true, to what is actionable and applicable for development.

Within social science, validity has also had a methodological and instrumental reference, historically adopted from the natural sciences, particularly measuring what is representative and generalized knowledge on a phenomenon. However, attempts to establish such generalized knowledge on leadership has failed within most areas, whether the focus has been on personality, situations, behaviour, or mere social constructions.

During the last fifty years or so, the extensive critique of the empiricist and “positivistic” perspective has opened up the research community’s approach to knowledge production toward an almost indefinite number of ways to define validity, all of course attempting to create valid knowledge. In this critique, the technical and instrumental understanding of validity seems to be abandoned, and the alternative does not seem to be constituted by “one” new conception, but rather by different sets of validities for different perspectives, different discourses and interpretational horizons; even though many theories claim to have created a universal understanding of validity, such as Luhman’s (1995) theory of social systems, and Habermas’ (1996) theory on the universal structures of valid arguments. The basis for their claims is the construction of abstract conceptual theories of validity that can easily be agreed upon; but at the same time, they give no unified instructions for valid knowledge applicable to a particular or concrete research project, where the actual knowledge production has to take place. Consequently, they open for the same discussion on what constitutes an applied concept of validity, for instance when it comes to giving concrete answers of what is valid knowledge on leadership, in the same manner as many theories that reject the possibility of universal validity. Even though it is easy to agree upon transcendental-pragmatic ideas of truth, and that language contains unavoidable conditions of possibility for knowledge, the derivative of which gives inescapable arguments for validity (Habermas, 1996); or the inescapable and universal reality of social systems (Luhman, 1995); or other general and fundamental abstract ideas of truth and validity, the same manifold and diverse

discussion emerges when one is faced with the attempt to build knowledge on, or decide upon, practical problems – for example in the shape of what is to be considered good leadership.

Accordingly, validity cannot be fully derived from the application of abstract and theoretically distanced ideas, even if their theoretical foundations are of a universal kind. These arguments can lead to different sets of validity constructions when the objective is to create knowledge in practical settings, and one reasonable way to achieve these might be to apply more practically oriented epistemological philosophies. Different conceptualisations are available, and Wittgenstein's (1953; 1997) theory of meaning and language is one of them. Again, this does not provide us with direct instructions for knowledge production, but rather with a way to understand meaning production, where the validation of meaningfulness is related to the practical and experiential use of words, concepts and models. There are, of course, difficulties associated with equating meaning- and knowledge production, so the actual applications for knowledge production in the field of leadership research have to be concretised further. This is done below, as well as in part 3 on methodology.

I will begin with a summation of the investigation of leadership research established in the four angles created above, and condense these into four major critical points:

1. *There seems to be a negative correlation between the scientific support of leadership concepts and models, and their diffusion, application and developmental use.* As is exemplified in the above discussion of the model of Blake and Mounton (1985), and Yukl's (1994) "integrating conceptual framework", there is an indirect negative correlation between usefulness or diffusion and scientific support. Thus, more of the same research strategy will probably contribute towards an increased gap between experience and research based knowledge.
2. *There exists no consensus on the definition of leadership.* As exemplified in the discussion of leadership definitions, a common assumption in the field is the existence of almost as many definitions as there are researchers. This lack

of unified definitions is combined with a notion that it is necessary to create unified definitions to add further knowledge to the field. There is reason to question whether this constitutes a problem, and perhaps the assumption and its premises constitute a bigger problem than the actual lack of agreement on clear definitions. And again, the fact that research is not able to capture the ultimate leadership definitions is contra-intuitive to general experience: Most people, if asked, have a working definition of leadership, or a theory in use, and they tend to know a lot about it. So far, theoretical discussions based on traditional validity criteria are only able to make the opposite conclusion: That it is impossible to define leadership, or to create valid causal analyses of it, or even to observe it. This represents more of a theoretical problem within the existing paradigm than a practical problem for knowledge generation on leadership, and therefore one might want to look for another approach to validity, one that is more closely integrated with common and actual experiences.

3. *It is difficult to establish causal relations about the effect of leadership.* This is based on the traditional scientific belief in the relevance of focussing on the dependent and independent effects between variables, and of understanding valid knowledge production as analysis of what variables cause or condition other variables. In leadership studies one could easily detect the misfit of this approach by multiplying the content in the canonized approaches with each other: In order to establish valid causalities in this sense, leadership research would have to handle the multiplication of the different leadership personalities, times the possible number of different situations, times different behaviour and skills, times differences in subordinates, to mention but a few variables. These factor analytical problems would create a picture so complicated that one would not be able to see a picture at all – only pixels. Creating models that make it possible to detect some useful pictures -- pictures that can be practically tested and applied through the experience of leaders -- therefore seems to be a more fruitful approach than having the ambition of disclosing the picture as such.

4. *Attempting to legitimate leadership and authority by research is associated with fundamental and substantial difficulties.* As discussed above, this happens when, for instance, leadership is conceptualised as a function of boundary regulation (thus constituting epistemological complexity reduction) and handling of exceptions and divergence from routines. Leadership artificially serves as the fundamental guarantee for direction, and it becomes impossible to scientifically establish the rule for the ruling on exceptions – or rules for leadership in action. Ultimately, the rule for the rule has to be established as a function of leadership, and not through research. Within this logic ontology and epistemology relate to science analogously to the way leadership relates to organizations. Just as the rules for scientific methods have to be established through epistemological and philosophical reasoning, the rules for leadership have to be established through philosophical fields such as ethics and power rather than through the rules (definitions) of leadership. It follows from this that epistemological reasoning should determine methodological approaches, rather than the applied technical, instrumental, and methodology-driven validity criteria.

In sum, these epistemological arguments point towards a methodology based on a more pragmatic, action, and experience-oriented knowledge production. In this perspective, all of the established critiques – or anomalies – of the mainstream field of leadership research point towards a different knowledge production regime, a different conceptualisation of validity, and a closer integration of experiential learning and knowledge production.

One consequence of this discussion of knowledge production and validity relates directly to an argument at the core of pragmatism that to a greater extent takes experiential learning – as systematic reflections in and on action – into account as a principle for workable knowledge production. When any leadership phenomenon can be approached from, in principle, an indefinite number of directions, rather than seeking to identify which of these approaches are the most valid ones, in theory – which is then by definition a tautology – one can start to look more in the direction of workability and usefulness. This also applies if the purpose is an ideological, ethical or normative one – as is usually the case.

Again, keeping on presupposing that “some more research” could constitute the valid knowledge, or contribute to completing the picture, seems to be part of the problem. The field is by substantial nature incomplete and paradoxical, and in order to bring the research forward one has to shift into or add a more actionable and experiential approach on validity. This is precisely what I am trying to do when integrating leadership studies more closely with experiential learning and organizational development; not as another final perspective, but as a possible alternative for advancing the field, given the many anomalies identified. Thus, knowledge validity could be better connected to how translatable the models are to the generative context, in combination with how the translation helps bring about further systematic reflection on action. In short, validity can be judged on how it systematically contributes to the production of experience, rather than how it constitutes detachment from experience.

In essence, the above reasoning is connected to the lack of action and experiential relation in leadership research, thus arguing for a mere action and experientially oriented knowledge production. As discussed above, this main line of reasoning could also be attached to and translated into other fields of knowledge production, particularly the mainstreams of organization theory. Such a translation is not an emphasis of the purpose here, but I will use elements of the theory on organizational development to further illustrate that the limitation does not reside exclusively in the individual focus in leadership theory; it is mirrored by the state of affairs in organizational theory, where the individual, and particularly the individual leader, has all but disappeared.

2.3 Theories of Organizational Development – “Take Me to the Leader”

The second part of the headline paraphrases the first demands aliens are supposed to make when they enter the strange world of humans – according to the cultural expression and popular stereotype of science-fiction. Entering the world of organization theory, one is sometimes tempted to make the same demand, of asking

where the leader is.⁵⁰ This is not to say that leadership is completely absent from organization theory, but rather meant as a point of departure to start to investigate its status and role in theory building, as a platform for eventual integration. Part of the strategy for this part of the text is to take a somewhat closer look at the relation between individuals, particularly leaders, and organizational theory, by pursuing some of the epistemological considerations and angles discussed above. My ambition here is thus to discuss some of the theoretical considerations of integration between leadership and organizational development from the perspective of organizational theories. Hence, the applied integrative strategy treats leadership theory as the figure, while organizational theory represents the ground. This means that I particularly emphasise conceptualizations of individuals and organizations, and lack of such, in organizational theory. Basically, this examination follows a structure involving four steps:

- *First*, I present the present status of the field of organization theory, with an emphasis on topics of relevance to this text, through a short narration of the historical development of organizational theories and some of the main approaches. This narrative attempts to highlight the overall development of research approaches to organizations over the last four decades, and to identify some of the main perspectives that have typically dominated the period. My main ambition here is to illustrate the exponential growth in the diversity of approaches that has characterized the field during these forty years, and the relation of this growth to the subject of integration.
- *Second*, I discuss the present status of organization theory in relation to organizational change and the typical dynamic conceptualizations of organizations that have resulted in an increased focus on topics such as organizational development, organizational learning, and knowledge production and innovations in organizations. The object here is particularly to identify similarities and analogies between the theoretical development of the field and the developmental processes of the large system – the case – of the

⁵⁰ For example, books with ambitions of being authoritative in the field of organizational theory, such as the *Oxford Handbook of Organization Theory*, Tsoukas & Knutsen (2003), can serve to illustrate that the field of leadership theory and the field of organizational theory are divided systems, even though the substantial topics clearly do overlap. This particular book, with an explicit ambition of overviews the field of organization theory, also fails to deal with leadership as a separate topic, or to list it as a term in the subject index.

present study. Thus, the topics chosen represent an attempt to highlight elements of relevance for the analysis in part 4, by pointing at the typical descriptions of substantial developments in the field of organizational theory. Simply stated, the narrative describes a field evolving from the perspective of the “bureaucratic” organizations of the past, and towards the flexible, cross functional, and empowered organizations of today.

- *Third*, the development of the field is discussed in terms of changes in the metaphors applied, and of how the “linguistic turn” in philosophy of science also contributes to a linguistic turn in organizational studies. One consequence derived from this turn is an attempt to apply a perspective of organizational and leadership development as language development, and thereby – in theory – to integrate the leadership and organizational development partly through a focus on language development. This third part is further meant to prepare the ground for an applied perspective that goes from a multifaceted and diverse conceptualization of organizational metaphors, toward a perspective on interventions as knowledge production for organizational change. The perspective of seeing organizational development simultaneously as language development is one that is also applied in the later analysis; and generally speaking, this perspective is closely connected to some of the main traditions of actionable knowledge (e.g. Argyris, 2003; Argyris & Schön, 1996).
- *Fourth*, the ambition is to concretize the kind of interventional challenges typically perceived in relation to the practical interventions made within this system, as well as to locate where the focus lies in this respect for Action Research in general. These challenges are grouped into three typologies ranging from possible regression effects experienced after the completion of single-project development initiatives, to challenges posed by developmental forces related to “non-human actors”. These challenges are also used as analytical categories in the analysis, particularly to sum up experiences made in the projects discussed (part 4.3), as well as in a re-visit in the conclusions of the last part (part 5.2).

The overall ambition of this part is to provide a theoretical backdrop to the further analysis, particularly by giving an insight into what kind of organizational theory and

overall approach is conceived as useful for the practice of theory building in this case. It therefore implies a paradox seemingly present in relation to all organizational reflexivity: As a practitioner engaged in the generation of theoretical knowledge, or the practice of theory-building, one faces questions to which there are no decisive and definite answers. Similarly, within leadership research, the theoretical questions of organizational theory are always and already inconclusive, in the sense that they imply different perspectives or different paradigms which build on qualitatively separate presumptions, and which are thereby also victims of degrees of incommensurability. *Therefore, the point here is not to artificially create a consistent system of theory, the whole picture, or clear definitions; but rather to identify some directions that are better suited to (and perhaps more valid for) the purpose of integrating perspectives on leadership and organizational theory.*

The characteristic traits of the field of organization theory as described here build on one basic presumption important for the demarcation of the discussion: At least for the last four decades of organization theory building, as the dynamics of and *changes* within organizations became a major theoretical topic, *almost all the perspectives and approaches in organizational theory can be said, in one way or another, to deal with organizational change and development.* In that sense, we can say that the main topics discussed are related either to organizational change as such, or to the more continuous and dynamic process of adaptation, learning, innovation, knowledge production, and so on.⁵¹ This provides a contrast to the earlier theories found in Taylor and Weber, whose main focus can be described as seeking to stabilize and create routines for the production processes, based on the challenges of their time. Consequently, and for the purpose here, the distinction between organizational theory on the one hand and theories of organizational change and development on the other, is not employed as a basis for discussing contemporary organizational theory.

⁵¹ One of the popular characteristics of the field is that change and development is the normal state of today's organizations. This is highly reflected in the theories, which almost without exception deal with some kind of change or development. It is of course also reflected in the organizational design, and in an overly simplified version, one of the trends looks as followings: Earlier organizational theories were about complex organizations designed for simple tasks (as found in Taylor, 1911; 2006; and in Weber, 1975), whereas now they are about simple organizational forms designed for complex tasks (typically flat and empowered "knowledge producing" organizations).

Organizational Theory – History and Diversity

On the basis of the discussion of the field of leadership research in the previous part of this text, we can derive some parallel conclusions on organizational theories: If it is difficult to create a well defined unity of definitions in the field of leadership studies – and we can reasonably argue that the epistemological difficulty involved is considerable – one can state that this is even more so in the field of organizational theory, which represents an even wider field and relates to and integrates an even wider set of thematic areas from social science. Nonetheless, just as for the discussion of leadership research, it can be useful to take a brief look into the field of organizational theories in order to further ground and contribute to the discussion of integration between leadership development and organizational development. The strategy, then, is to give a short introduction to some of the main lines of development in organizational theory; take a quick glimpse at the fundamental diversity in the field today; point out some substantial developmental issues and relate them to the project, and use these – to the extent that it is possible – to place and further ground the perspective applied for the purpose of this text and analysis. Consequently, like the rest of the text this part has no ambition of giving an authoritative overview of the field to identify gaps; but like the previous part, it seeks to delve further into some of the epistemological premises for the integration of leadership (individual) and organizational development –through the lenses of organizational theory.

The Origin

The origin of explicit organizational theories is normally considered to date about one hundred years back in time, at the outset of industrial capitalism (e.g. Reed,1995). The growing dominance at the time of large-scale organizational units, together with an increased attention given to rational and “scientific models of organization”, led to a conception of a rationalistic and positive belief in organizations as a means of liberation from irrationality, injustice, and even poverty (ibid). The works of Max Weber (1920, 2000) and Fredric Taylor (1911, 2006) are normally given an important role in this genealogy of organizational theory. Such stories of origin and genealogy may have fitted into the historically speaking strong and partly optimistic belief in reason and rationality which was ripe at the time: Reason and rationality were

considered a salvation force for society in general, and particularly as expressed through a science-based “organizational society”. However, people have coordinated their efforts and work at all times, and in the Western world, elaborate concepts and definitions of organizational structures can be traced back at least to Aristotle (e.g. as illustrated by Eikeland, 2006) and the ancient Greeks; whereas in well coordinated and “organized” cultures in other parts of the world, this history is most likely to have started even earlier. William Starbuck (2003), for example, sets up a complete and more comprehensive model for understanding the genealogy of organizational theory. For instance, he identifies more than 4,000 year old writings about management and shows that writings which qualify as characteristic of bureaucratic organizations have existed for more than 3,000 years. Another story of the origins of this field is created by Scott (2003) in his widely distributed book *Organizations: Rational, Natural and Open Systems*, where the genealogy is directed toward the translation of Weber in the forties; the gradual re-discovery of Taylor, Barnard and Mayo in the academic community; and the testing of generalizations dealing with organizations as social systems accomplished by the students of Robert Merton. Hence, the question of “where it all started” seems to be a question of how to define what qualifies as organizational theory. Nonetheless, linking the history of organization theory to the growth of industrial capitalism is a reasonable approach, in the sense that it helps identify a shift in theory production and focus, as well as the beginning of an explicit language and conceptualization of organizational theory as a professional academic discipline. For the purpose here, I will argue that it is more important to identify and acknowledge the exponential growth in the field over the last decades, thus to illustrate that the field of organizational theory is also characterized by, and can be fitted into, some of the basic epistemological discussions concerning the field of leadership research. The development over the last decades also implies a change in the theoretical status of the individual subject’s relation to the collective organization; a change which concerns both the employee, the role of the leader and, not least, *the role of the researcher*.

Functionalism Challenged

In the social sciences in general, we have seen more than forty years of vast production of theories under the umbrella of *critique of positivism*, and naturally the connected discourses have also affected the approaches of organizational studies.

Correspondingly, what seems like the once-dominant position of a functionalistic perspective in organization theory has been heavily challenged. Functionalism in organization theory is considered a position based on the logic of seeing effective organizations as *functional* instruments, applied through rational decision making, with the purpose of achieving formally explicit goals (Clegg & Hardy, 1996). This logic also partly presupposes and supports a well-defined and structured division of labour where leaders and management define, make plans, coordinate, and take decisions, while employees execute. The role of the researchers in this perspective of “normal science” is to collect objective data connected to the functions of organizational goal achievement. Highly influenced by the success of natural science, a similar rationality was adopted by this approach and characterized a dominant consensus of this “normal science”, particularly in the beginning of this period. Together with the extended “critique of positivism” in the social sciences, which is particularly directed against such “normal science” paradigms, Functionalism has been challenged by an overabundance of alternative approaches. The multitude of approaches today makes it difficult to identify a complete set of typical characteristics for these “anti-positivistic” critiques and their outcome, although one important characteristic is to see organizations as systems and relations of actors and subjects rather than as observable objects, and the subject of study as something that by necessity *interpretatively* interferes with the theories. Consequently, theories turn from being functionalistic and descriptive to being *constitutive* for the reality they deal with, as well as for the field of (meta-) organizational studies. As discussed below, this turn also represents a shift in the conceptualization of the individual, and partly contributes to the reduction of its complexity by conceptualizing the individual as situated within relational processes of social meaning construction.

Over a historical parallel of at least forty years, a great number of approaches have evolved, and are still evolving, under the preserved umbrella of functionalism. But maybe for institutionalized reasons, functionalistic perspectives are – in spite of the massive critique – still widespread in the academic discussions and theories on organizations, and believing in objective science and a rationality disconnected from the multiphase of interpretations and social constructions seems to be an effective and persistent rhetoric for a great many research communities. Stereotypically, the label “*Contingency theory*” (e.g. as strongly advocated by Donaldson, 1996a; 1996b)

represents one such rather commonly accepted perspective. As it is widely applied in a wide variety of substantial areas ranging from leadership and strategy studies to organizational economy and ecology, the perspective is heavily represented in teaching programs at universities, introduced as criteria applied by research founders; and it still rules many of the main “style guides” for organizational journals. Hence, more than forty years’ worth of critique seems to have had limited impact on the approach followed by a major proportion of the research community within organization theory.

For the case of organizational theory, Clegg & Hardy (1996) root a main shift in perspective away from functionalism and “contingency theories”, and the triggering point for the exponential growth of more interpretative and social constructive approaches, to two main contributions: First, to David Silverman’s (1971) *The Theory of Organizations*, which particularly had an impact on the British scene, with its interpretative approach to organization theory; re-focus on actors as opposed to systems; emphasis on social constructions as opposed to social determinism; shift into interpretative understanding of subjects as opposed to a logic of casual explanation; and plural definitions of organizations as opposed to singular definitions. The second triggering-point is identified as Carl Weick’s (1969) book *The Social Psychology of Organizing*, which was particularly dominant in the United States. Weick provided a conceptualization of the processes of organizing, as opposed to the entities of organizations, and was an early proponent of applying a social construction phenomenology of “sense-making” to the field of organization theory. Thus, it seems reasonable to trace important contributions to both of these works; however, as parts of the social sciences incorporated such perspectives long before both Silverman and Weick, it is also tempting to radically widen this perspective in order to identify their predecessors in the field of organizational theory.

Furthermore, as a main argument in the *Oxford Handbook of Organizational Theory* (Tsoukas et al., 2003), the shift and development away from the rather rigid and limited assumptions of “normal” and positivistic-oriented theories, and away from a perspective of organizations as rationally designed systems, is seen as representing an overall turn into a more complex and realistic view of organizations as historically

and socially constituted. Or to quote a compact and concentrated summation made in the introduction of this overview (ibid.):

From this realization, now more or less taken for granted, stem most of new investigations, such as those exploring the social embeddedness of organizations (Granovetter 1992; Granovetter and Swedberg 1992; Scott and Christensen 1995; Scott et al. 1994; Whitley 1992); the profoundly cultural aspects of organizations (Kunda 1992; Frost et al. 1991); the social construction of social identity (Brown 1997; Whetten and Godfrey 1998); the irreducibly emergent texture of organizing (Stacey, Griffin, and Shawn 2000; Taylor and Van Every 2000; Weick and Roberts 1993); the importance of history in accounting for aspects of organizations (Dobbin 1995; Kieser 1998; Roe 1994; Zald 1996); the process through which sensemaking in organizations takes place (Weick 2001); the centrality of learning and knowledge to organizational functioning (Cohen and Sproull 1996; Grant 1996; Spender 1996; Tsoukas 1996); the importance of power and the significance of gender in organizational life (Calàs and Smircich 1996; Gherardi 1995; Martin 1990); and the influence of unconscious processes and psychic needs on organizational functioning (Gabriel 1999).

The quote illustrates where the field is heading today, and it also contributes towards demonstrating that the continuous critique of positivism is starting to fade away as a fruitful approach for further development, and is fast becoming a fight against straw men. This may not apply to the institutions of organizational theory, but it is certainly the case within the current dominant theoretical discourse in the field, as for example represented by the *Oxford Handbook of Organization Theory* (ibid.). Hence, the “new normal science” constituting the field has adopted the main elements from the critique of positivism, and consists of a rather a diverse and wide set of interpretative approaches.

Moreover, as already mentioned in the introductory part, this epistemological and philosophical debate about knowledge on human existence and interaction – as either universal and objective, or relative and interpretative – can be traced back some thousand years. This also gives us reason to believe that the field of

organizational theory will fail to solve this incisive dispute, as have earlier approaches; and we are even tempted to infer that each perspective is constituted partly as an opposition to the others and that they are as such to be seen, epistemologically speaking, as mutually dependent rather than mutually exclusive – but this debate, too, is deemed to be inconclusive.⁵² The conclusion and approach applied fail to do such a huge debate justice and represent an oversimplification of the problem, but for the purpose here and in the analysis to come, I will apply the concept of knowledge and theories as *constitutive as well as descriptive and reductive* as a way to bridge the dichotomy of either “interpretative” or “essentialist” knowledge production.

Individuals Redefined

The relevance for the overall topic here might be found if we take a further look at the changes and transformations in the conception of the individual subject. To start, one can take a look at the interim establishment of the term “post-modernism”, basically applied in the eighties and nineties, but in organizational theory representative of the development away from the rationality of “modernity” (e.g. as found in Harvey, 1989). What has already become an historical and partly out-dated concept of *post-modernism* was often applied to describe “the new” in this period of time. It was similarly rooted as a critique of singular definitions, and particularly of the grand narratives ruling the classics of social science. For instance, it rejected the concept of regarding individuals as visible only in so far as they represented the identity of a grand narrative, such as the Marxist conception of “social class”; or biological human “essentials” established through grand narratives in psychology (such as behaviourism) or natural science (such as evolution theory); and for the field of leadership, the search for the ultimate personal characteristics and personality of effective (and great) leaders. Likewise – and for example influenced by the work of Foucault (1972) – one can see the individual in social constructivist perspectives as a

⁵² It is widely debated whether it is altogether possible to make this kind of comparisons; and how one is to translate between paradigms that are founded on essentially different preconditions. This is often referred to as the “Incommensurability of paradigms” and relates to the difficulties of establishing clear-cut demarcations for the epistemology of knowledge production. By a metaphor the problem can be described in the following manner: Just as a hand cannot grab itself, one cannot identify the preconditions for conscious knowledge-production through the use of consciousness – even though there is no other way, just as a paradigm cannot in principle be fully undressed or translated by another one.

relatively new and culturally specific construction⁵³. No longer stripped down to his bare essentials, the individual is now fitted into a relative size subject to socially constituted and socially negotiated categories of analysis. Such views are typically represented under the umbrella of “post-modernism” and the associated flourishing of theories on social constructions. In this perspective, even the essential dichotomy of “men” and “women” was, and still is within the most radical perspectives, treated as a cultural and historical construct. So no wonder, then, that one of the critical attacks on radical constructivism is about its lack of conceptualization of materiality, even though today it is rather obvious and commonly acknowledged that the concept of gender varies between cultures and historical epochs. As suggested in the discussion in part (2.1), the development had its clear parallel in the field of leadership studies in the shape of “the linguistic turn”, which focussed on leadership as speech acts and symbolic interpretation. As such, the renewed attention given to the role of language in social constructions no doubt contributes towards understanding the social construction and logic of for instance individual attributions connected to “heroes” and “scapegoats”, or language and power, for the sake of leadership. At the same time, however, it results in the creation a new blind spot – or lack of language and concepts – namely for individual and psychological, as well as technological and economic materiality. The attempt here, then, is to acknowledge the critique of positivistic and functionalistic approaches and perspectives, and to see that the essentialist characteristics of the individual have serious limitations and epistemological flaws, particularly as discussed for the theories of leadership. But at the same time, the example of history shows that it is a reasonable approach to not directly accept and adapt the new reduction of individuals within the latest paradigm; a paradigm highly oriented toward social constructions and the role of language. As argued, and further discussed in part 4, the heavy forces of materiality then tend to get in the back way, and the relatively short-lived term of “post-modernism” may help illustrate the need for caution in terms of the historical temporality of conceptual trends. Even though many “hard-core” constructivists will reject the possibility of “choosing” – due to the incommensurability of the paradigms – and at the risk of committing category mistakes, I will argue that for a pragmatically-oriented purpose, this fundamental debate can be temporarily handled by a combined reduction of

⁵³ Even though other constructivisms, particularly those without the prefix “social”, such as more phenomenologically oriented approaches, do apply the *individual* (experience) as point of departure.

theory, or a “third point”. And one possible way to advance the theories of individuals versus organizations, as well as to transcend functionalistic versus constructivist approaches, is to give them status as mutually constitutive. This also means to build further on the parallel rationalities given by treating the language of organization and leadership theories as both constitutive (constructivist) and descriptive (essentialist) at the same time.

The Ruling Diversity

In short, there is vast and undisputed diversity in the field of organizational theory, ranging from the claims to “normal science” of e.g. Functionalism and Contingency theory, via literally thousands of different substantial and organizational themes and issues, through post-modernist, interpretative, and constructivist approaches, and a renewed focus on the role of language. This diversity within more interpretative approaches and perspectives is in itself vast, as can be illustrated by some of the many labels applied, such as Post-modernity (Harvey, 1989), Critical Theory (Willmott and Alvesson, 1992), Post-structuralism (Sarup, 1988), Social Constructivism (Gergen, 1994), Social Identification Theory (Hogg and Abrams, 1999), and Vygotsky’s Sociohistorical Theory (Ratner, 1991). In this diverse and abundant field not solely limited to organizational studies, one of the main divides that seems to reoccur, and to be at the core of the disputes, is again the epistemological role of language. It is argued in part 2.1 that the empirical nature of the diversity in the field of leadership can constitute an epistemological argument as it relates to the question of overviews, and that the validity of knowledge production may benefit from taking a more experience-based and pragmatic approach to theory building. And again, in theory, one strategy for organizational theory might be to conceptualize the individual in organizations through a double focus on the *constitutive* as well as the *descriptive* functions of language. Thus the individuals too face a double role, as actors who constitute organizations, and as inscribed into, and constructed by, the given descriptions and understandings of organizational structures.

This debate on the role of the individual has its clear parallel in the tradition of *agency versus structures* in organizational theory, and it is parallel to the fundamental, and one of the oldest questions, raised in social theory in general, as discussed for

example by Reed (2003): How is agency – the motivation and influence of individuals – related to structure – the collective entities of social systems as organizations? Reed further argues that with the increased focus on creative and innovative organizational actions for effective organizations, the role of agency requires new attention, as these actions are often initiated and maintained by pioneer actors. He has few answers, though, but to give up *determinism* in the sense of following a one-sided focus on structures, and similarly to give up the *reductionism* of following a one-sided focus on individuals as constituents of organizations. Reed attempts to create a third point of transcendence named *relationism*; a perspective trying to include both the casual efficacy of structures as well as the creative role of human agency. Although his contribution is basically a meta-theoretical one, and one without any applicable or actionable consequences for the topic of leadership, it may serve as a summation of this theoretical discussion on organizational theory, and as analogue to my perspective of integrating leadership development and organizational development.

The Development of Organization Theories – Substantial Changes in Organizational Metaphors

As the argument goes, the complex diversity of the field and its development over the last decades make it difficult to present an authoritative story of the substantial and empirical development. However, despite the disputes and multiplicity of epistemologies, theories and methodologies, there exists what is often identified as an underlying consensus about the type of new organizational forms growing out of the fundamental societal changes: Typically, these are seen as qualitative shifts in the conceptualization of international relations (globalization); shifts in the arrangements of value chains; shifts in industrial production processes; introduction of new technologies; shifts in terms of the role of knowledge production; and increased focus on innovations. Some common traits can be identified in the development narrative of organizational theory, typically found in overview books such as the quoted *Oxford Handbook of Organization Studies*. Thus, despite the theoretical discussions concerning approaches to research and knowledge production, there seems to be agreement on some overall empirical development

traits, typically characterised as a shift from bureaucratic to more flexible and open systems of organization. This is not a unified story, nor is it to be understood as the only one, but rather as one of the parallel stories of the directions in which the overall trends tend to move (for example, there also exists a discourse of New Public Management (Mclaughlin et.al, 2001), which to a great extent is directed towards discussions on the “re-bureaucratization” of organizational control; as well as discourses under labels such as the “Re-taylorization” and “McDonaldification” of working life, which highlight the development in unskilled labour, the exploitation and alienation of employees, and the role played by the mechanization of work processes).

The overall storyline adopted here, towards flatter and more cross-functional and team-based organizational principles, has direct parallels in the overall organizational development processes of the large system which is analysed below, and might most typically characterize systems of technology-intensive and innovation-driven production processes. In short, it is an overall development with a high degree of correspondence with the organizational change processes described in the introduction: Going from hierarchical and profession-based departments with a clear cut divide between leaders and employees, toward the establishment of cross-functional teams with expanded autonomy and empowerment. This also corresponds with changes in the conception of leadership identified in part 2.1, describing the overall change in the role and function of leadership as an evolution from a casual relation of giving and receiving orders, toward an increased tendency to see leadership functions and relations as transformational and indirect persuasion through influence. As such, the development, or the formal ambitions of development of this system, also corresponds with the comments on the opening of metaphors and its relations to the field of leadership development as discussed in angle three above. But of course, the one case discussed here far from constitutes empirical support for a trend: it merely provides an example; although it does serve as the justification for why this particular storyline is highlighted below. The following paragraphs present a short version of this “canonized” narrative of substantial developments in organizational theory, related in time to the particular field projects and the analysis found in part four.

Here too, an outline of bureaucracy and its dominance in early organizational theory may serve as the point of departure. Seen in the light of this type of theory, as stereotypically described by Weber (1920, 2000), organizations are characterized e.g. by centralization, hierarchy, authority, discipline, rules, clear division of labour, and typically well structured and “rational” procedures of decisions. According to similar contributions, this almost military-like organizational form represents one of the most common archetypes in organization theory (also found in Clegg et. al., 1996). Consequently, it has also represented an easy target for the subsequent and massive critique. Even though the field is overflowing with new organizational concepts, the structure and logic of typical bureaucracy is also highly relevant today. And for the case analysis in part 4, the turn into cross-functional teams; the balance of centralization versus de-centralization; as well as the parallel processes of development of organizational structures and development of leaders, all have the critique of bureaucratic organizational forms as some kind of negation and point of departure. Moreover, as discussed in part 4.6 on the necessity of parallel rationalities for well-functioning democratic organizations, there is little reason to abandon the typical traits of traditional forms of bureaucracy, or to write the many forces pulling in a parallel and opposite direction of re-bureaucratization out of the picture; rather, they should be seen as preconditions for, and even partly complementary to, the more “fluid” and autonomous organizational forms common today. And as for the understanding of the leadership function in relation to organizational changes, there are reasons to believe that the rather fixed structures of more bureaucratic organizations decrease the pressure on, and the over-consumption of, leaders found in less structured organizational forms.⁵⁴

Both globally and macro-oriented as well as more internal and micro-oriented approaches are applied in the literature to describe the experienced changes in organizational forms and structures, and they all seem to contribute to the emergence of what is characterized as more flexible organizational forms. From the macro perspective, it is argued that organizational boundaries are blurred, and that new forms of value chains and external relations have emerged, along with structures such as clusters, networks, and strategic alliances, particularly in relation to more

⁵⁴ In Norway the turnover of leaders has quadrupled over a period of ten years (According to the publication: xx??).

international and regional cooperation (e.g. Castells, 1996). From the micro perspective, the narrative typically describes a change from the bureaucratic division of labour, into empowered, flat, flexible, post-Fordist, project-based organizational structures (in Clegg et al., 1996). Similarly, the increase in so-called knowledge work increases the need for quicker response time and decision making, closeness between expert knowledge and the production process, and more decentralization and distributed organizational structures (as described e.g. by Galbraith and Lawler, 1993). The proponents of this perspective argue for a transformational leadership function often described as team leadership on all levels, as well as for the need for leaders to gain competencies in team development, understanding of group processes, conflict resolution and the like (ibid.). The abandonment of traditional bureaucracy also establishes new metaphors and conceptualizations of hierarchical relations. In terms of fostering efficiency in decision making, the free flow of information, fewer status or rank-driven decisions, empowerment of employees, and better organizational learning processes, the traditional structures of bureaucracy and hierarchy are considered mostly as a drag (ibid).

As discussed in the introduction, many of the predecessors of this development, particularly in the Scandinavian context, can for example be found in the work of Emery and Thorsrud (1976) and in the general emergence of socio-technical system theory and concepts. These are also conceptualized and presented through developmental tools (as discussed in Levin & Klev (2002), summing the influence and content of widespread concepts such as Total Quality Management principles (Flood, 1993), Business Process Reengineering (Hammer & Champney, 1993), Learning Organization (Senge, 1990; Argyris & Schön, 1996), and Balanced Scorecard (Kapland & Norton, 1996). And, as elaborated in the analysis of part 4.6, just as any pendulum movement in the unforgiving light of history seems to represent more of an antithesis of the previous models than a new synthesis, it can be argued that well-functioning democratic organizations need a parallel set of rationalities, among which should be found the structuring logic of hierarchy and traditional bureaucracy.

These kinds of developmental traits are also represented in the case at hand, particularly in the principles of the BOI process, and the overall change efforts of the

large system correspond well with such characteristics. They are directly linked to the historical tradition of socio-technical thinking and cooperation with the Work Research Institute, and the phases of development in the field of oil production (as described in Qvale, 1983).

And for the particular case and further analysis it is basically the micro perspective and the *internal organization* – and particularly interventions made in order to build a more team-based structure, and particularly in terms of the role of frontline leaders – that is in focus. For a large system, with complex sets of internal structures as well as external and international relations, these overall trends and changes are conceived as motivated by both internal and external driving forces. And in addition to the historical background, the changes in this case were also motivated both by external Benchmarking as well as internal work environment measures. Related to the traditional way of organizing offshore production, they represent a rather radical organizational innovation. And like any radical innovation, it does not only lead to an approval of new insights, explanations, and descriptions in organization theory, but also to disapproval of established and practical competencies and routines.

Given these rather large and permeating changes with respect to the driving forces of both external macro and internal micro forces – as well as in terms of historical development – elements of the change process discussed in the analysis are not understood as a question of stepping from one model into another, or a quick fix, orchestrating a one-off and limited process, or simply organizing internal participation processes; but as a matter of interventions connected to a rather long-term social maturation process along a complex set of dimensions and levels.

The characteristics of this way to narrate shifts in organizational concepts also bring us to the core of the overall question: *Why integrate leadership development and organizational development for the purpose of large system change?* As the internal organizational changes of the case have clear similarities with and are parallel to large trends over the last forty years of organization theory; and as they affect almost any aspect of relevance for the organization, from micro to macro, from internal to international, and from individual to organizational; this also points toward changes in

the role and function of leadership – particularly the role of leaders and their eventual ability to orchestrate radical shifts within their own organization.

It is part of the claim for this text, that even though the general changes are also reflected in contributions on leadership theory, it is difficult to apply them directly as a source for leadership development. For example, most of the leadership theories on change, innovations, team development, and related topics of “knowledge management” are, as argued in the previous part, established within a theoretical ethos partly detached from the world of practical development, and detached from experiential-based knowledge production. A similar consideration has been part of the discussion of organizational theory for a long time. Organizational theories in general, particularly those established within the ethos of “normal science”, have been criticized and considered to lack practical validity. This kind of critique can be found in many contributions: it has a long-term history in the Action Research traditions both in Scandinavia and elsewhere, and it is exemplarily formulated in the elaborate work of Chris Argyris (2003), and as part of the discussion on knowledge production in the work of Nowotny et al. (2001). This kind of critique addresses one of the main challenges for organizational theory, and that is particularly to find ways in which the experiences of practitioners are integrated into the knowledge production of organizational theory. Consequently, one of many means applied to better handle such limitations of organizational theory might be to integrate the developmental efforts, and create a more experiential based language of development. And this forms an additional part of the basic reasoning for the application of an interventional approach for organizational knowledge production, where organization theory also becomes a “science of policy”. Furthermore, as Argyris (2003) argues in the article that sums up his work so far, the established theory for the use of organizational research is to delay production of actionable knowledge until the body of descriptive knowledge is cumulated to a point where it can inform actions. He adds that this theory in use is falsified by the fact that there is no such “additivity” to be found within organizational science, in analogue to what I illustrate for the field of leadership theory; and that there are fundamental reasons for why it is also not going to be found within the same theory in use; and the consequence is a continuation of lost promises. Unless, that is, one adapts a more actionable approach, give up the traditional validity criteria, and integrate interventional action as part of the

production. Related to the research question then, this goes for the development of both leadership and organizations, and can work as a line of reasoning supporting the integrative perspective.

Organizational Metaphors and Actionable Knowledge

Theories and conceptualizations of organizations can reasonably be, and often are, conceived as metaphors. For instance, the now classic work of Gareth Morgan (1997), *Images of Organizations*, has become a major reference in organization theory thanks to Morgan's approach of categorizing organizational theory and history through similarities in the use of metaphoric structures. And like other metaphors, organizational metaphors highlight certain aspects, help sort out particular dimensions, and have a significant impact on how organizations are perceived: For example, they can name and identify the limits for situations, and allow more explicit and collectively shared references to tacit and intuitive knowledge and emotions, as well as work as potential tools to facilitate collectively shared understandings in change processes. As organizational metaphors can work as such complexity-reduction structures, thereby constituting potentially powerful tools, they naturally also contain theoretical and practical limitations, and the ability to mislead. When the forces of complexity-reduction are naively applied, leading attention in dead-end directions as collectively defence mechanisms, or when they are constructed within a rationality and area that are qualitatively different from the rationality area to which they are applied, organizational metaphors can just as easily be destructive and a hindrance for practice. For example, as Argyris (2003) argues, if the metaphor of additive knowledge is applied, it detaches itself from the ability to create actionable knowledge, due to the way knowledge is conceptualized.

In the analysis of part four, this phenomenon is particularly highlighted through a discussion of the use of metaphors from a "technological rationality" and of some consequences when they are applied as tools to understand and direct actions for social systems – organizational development – or within the "relational rationality" of social processes. Treating organizational theory as metaphors is consistent with the pragmatic use of theories applied later in the project analysis. In the analysis,

metaphors and language-based conceptualizations are in general (both explicitly and implicitly) applied as metaphoric tools for development, as sensitizing concepts; and in part 4.5 they are explicitly applied for the purpose of integrating leadership and organizational development. As discussed above, some of the main organizational metaphors dominating organizational theory lack a clear conceptualization of leadership. This assertion can be confirmed by a further examination of Morgan's (1997) classic work. Nevertheless, as the purpose of many organizational theories is not to highlight the individual in organizations, pointing out the lack of contributions to this aspect might not be a complaint, but it can work as a legitimization to further construct and analyse an integrative perspective. Morgan (1986) also builds on the assumption that when one understands organizational theories as metaphors, and while no metaphor can fully express an organizational reality, a multi-perspective approach to organizational theory is inescapable. He further categorizes the multi-perspectives into eight dominating metaphors and conceptualizes organizational theories into these metaphors as: machines, organisms, brains, cultures, political systems, psychic prisons, flux and transformation, and as instruments of domination.

What they have in common is the epistemological basis that organizations affect individuals, and that this only partly works the other way around. But even more important for the purpose here is not the acknowledgement of a multi-perspective opened by metaphors; but rather, for the purpose of actionable knowledge, to create organizational theory and metaphors that work. Acknowledging the pluralism in organizational theory is not an end point in itself, but rather the starting point for investigating further what kind of interventions work. If the pluralism reflects the same distance to the object of study as an approach of the more rigid, positivist, and functionalist kind, in practical terms no gain has been achieved. This is really what the role of language in organizational and leadership development is meant to deal with, namely how to (co-) create metaphors of action that are *constitutive* as concepts as well as *descriptive* as theories. This represents a rather well-acknowledged insight in the tradition of Action Research (e.g. the point is also found in Greenwood and Levin, 1998), although the terms and the epistemological divide between constitutive and reductive/descriptive are not applied. This insight implies a conceptualization of practical reason, or of bridging the gap of theory and practice, and creating knowledge that actors can use to efficiently apply their attention in a practical

situation. This perspective is again connected to the similar reasoning of Chris Argyris (1996, 2003), when he argues that as organizational knowledge is by necessity policy science, production of knowledge is to produce propositions and theory that are actionable. This kind of knowledge is not reduced to practical insights of relevance only for practitioners; it is just as relevant for researchers, because actionable knowledge necessary for interventions also presupposes and demands a specification of theories or propositions for how to bring about change. In addition, the attempt to contribute towards change has its own intrinsic value for the validation of knowledge production, as it brings out organizational understandings not otherwise perceptible.

Thereby, it is the focus on *intervention* that eventually saves the new pluralism in organizational theory from being just another theoretical categorization irrelevant for practical understanding, or not consistent with the policy nature of its object of study. And as Argyris (2003) argues, when change interventions are accomplished and attempted, one will find that both positivist and interpretative analysis can prove efficient, valid and relevant. The plea for incommensurability between positivist and constructivist paradigms is merely a plea for another or different kind of scientific authoritarianism and not an acceptance of pluralism as advocated (ibid.). Argyris further argues that the organizational structures of hierarchy and routine are of a double kind, as they are both persistent as individual and organizational manifestations; and interventions thus need a double focus on individuals and organizations. Such a perspective points toward an approach where constructivist (constitutive) and positivist (descriptive) angles are combined as epistemological sources for methodology of interventions. Moreover, the success does not depend on whether the epistemology applied is that of normal science or of interpretative science, but rather on how they are related to and able to inform the methods of interventions. And as a consequence, this inquiry into organizational theory is rounded off with an introduction of and focus on the more practical considerations of *intervention* methods, applied as actionable knowledge capable of integrating leadership and organizational development:

Integration of the Development- Challenges of Interventions (one)

Reflexive Machineries as briefly described in the introduction and further developed through the analysis of part 4, are in this context meant to represent part of an interventional methodology for large system change, and particularly to foster the practical integration and mutual support of leadership development and organizational development. So far, the focus has been on connection points and characteristics of the field of leadership research; on some connected discourses; and on developmental traits found in organizational theories.

The purpose of this part is to contribute to the theoretical discussion of intervention methodologies and further to further create a foundation for the concept of Reflexive Machineries for actionable knowledge production and to establish the basis for the line of reasoning applied in the analysis, particularly in parts 4.4 and 4.5 (Reflexive Machinery), and part 5.2 (The gap of Seminar Reality and Daily Operations). And as introduced above, the concept of Reflexive Machinery is basically treated and defined as the label for a generic *exemplar of long lasting and institutionalised interventions* supporting large systems change. In the particular case further presented in part 4.5, it refers to an extensive leadership-training program designed and executed to support the overall change process of the system.

As a theory-building basis for action research processes it refers at the same time to interventions that systematize reflections in and on action, and interventions that are institutionalised in the organization's overall structures. This combined systematisation of *reflexions* and their *institutionalisation* will work as connotations and references for the label "*Reflexive Machinery*". Consequently, giving it the label of a seemingly contradictory dichotomy is a result of the attempts to bring two different rationalities into the interventional strategy. As formulated for instance in theories of organizational learning (Weick & Westley, 1996), an important and twofold oxymoron lies at the basis of any change or learning process: By principle or definition, to learn, develop, and create innovation is partly to *disorganize*, to increase variation, and to allow new and often emergent structures of action to arise. This, then, implies letting go of some established routines and structures and opening for something unknown through *reflexive activities*. On the other hand, to *organize* is in

principle and by definition partly the opposite strategy: To reduce complexity, to “forget”, and to create closed and repetitive patterns of stratified actions – patterns normally known as organization – or to create routines and *machine*-like structures. Weick and Westley (1996) further focus on the tensions of this dichotomy and the need to balance *organization* and *disorganization* in any developmental process, as well as to balance analogue tensions in change and learning processes – for example the tension between exploration and exploitation, order and disorder, seeing and not seeing, and forgetting and remembering. Of relevance for this case, they further apply this to see organizational learning and development as both more than and qualitatively different from individual learning, and to discuss the relation between individual and collective learning processes. They also put language at the core of attention, as learning occurs through social interaction in which language is a presupposition as well as a tool. As such, their approach partly follows the line of reasoning for this text, where individual (leadership) development is integrated with organizational development through a focus on the social processes of language development. However, when it comes to interventional and facilitation strategies; these authors have also failed to give answers that really bridge the dichotomised gap on how to bring disorganization systematically into organization – or how to institutionalize the reflexive praxis of change and development into the machinery of stratified organizations. One possible contribution of the concept Reflexive Machinery is therefore to supplement such double binds and paradoxical insights with methods of intervention.

One of the big truths (and maybe clichés) of organizations today seems to be the notion of permanent change, and the fact that never-ending organizational change has evolved into a normal organizational state. The consequent challenge of this seems to be to generate organizational dimensions for managing, mastering and coping with such continuous development or organizational innovation. This means that the interventional methodology has to be designed in accordance with this general and common continuous state of development, and the main purpose of this part is to introduce my line of reasoning as connected to interventional methodology, and to establish some of the conceptual background for the case analysis.

In order to see research partly as intervention one has to create a link between theory and practice, and sometimes transcend the divide which at least since the contribution of Kurt Lewin (in Pasmore, 2001) has been one of the main efforts and challenges of a large proportion of Action Research perspectives. Introducing the concept of Reflexive Machinery is an attempt to build on and expand some of the basic insights from Action Research on intervention methods, particularly when it comes to handling leadership development and more persistent and *institutionalized* interventions. For example, if one studies more closely some of the Action Research literature of interventions (such as part three “Exemplars” in Reason & Bradbury’s 2002 *Handbook of Action Research*), it transpires that one way to build further on this tradition is to strengthen the dimension of interventional permanence and sustainability. In this picture one can argue that one of the most important challenges of the methods within AR, as they are today predominantly applied to actions and projects of limited duration, is to strengthen the considerations of long-term or permanent effects, as short-term and single projects always run the risk of failing to create permanent and continuous change. In general, a majority of the methods of Action Research can be described as – with the conceptualisation of Gustavsen and Toulmin (1996) – small-scale “happenings” when referring to first-person and second person inquiry; or as political “events” when scaled up to third-person research (to use the terms of Reason, 2001). In this perspective, what is required in order to bring the interventional reasoning further are investigations into and a strengthened focus on how to create interventional methods for managing the almost undisputed continuous change taking place within today’s organizations.

While at the same time providing structure to this discussion, three categories of some “family similarity” can help explain and conceptualize some of the challenges when it comes to creating interventions with long lasting-effects. These challenges are also typical of the limitations experienced by the project group in their capacity as researchers when applying interventional methodologies in connection with the change processes of the case. Some of these experiences are further summarized in part 4.4, and given a more normative and prescriptive form in part 5.1. As such, the three challenges listed below and elaborated later will work as a backdrop to and reasoning for the theoretical introduction and practical “instalment” of Reflexive

Machinery, with the intention of strengthening Action Research with practical interventions with a “perpetual” dimension.

As a start, the three challenges connected to interventional long-term effect can be introduced as:

- 1) **Regression effects and Individual Projects:** Intervention methods and change processes are sometimes applied and conceived as “something else” than and “something in addition” to the everyday activities within the organization(s) – as a kind of disorganization of the organization, in practical terms organized as separate projects, seminars, and conferences. If the development activities are disconnected from everyday operations, this is likely to create challenges and limitations connected to problems arising from the social construction of a “tagged-on” and separate *seminar and conference reality*. This not meant as a normative comment to the effect that development and change activities have to be fully integrated in everyday work, but just to point out what seems to be the common experience of a *regression effect* following the return to the everyday life of work processes, and the return to the heavy material, economic, cultural and normative *forces* that rule the everyday reality of organizations. For example when results of a series of seminars and conferences, or developmental activities in general, create a burst of energy, initiatives and enthusiasm for change that are later overruled by some of the many external forces affecting an organization (e.g. time constraints, the introduction of new technology, changes in market conditions, and even in the shape of unanticipated results of terrorist actions – such as seen from the effects of increased oil prices in this system); or by some of the many internal forces (e.g. resistance to change due to professional identities and historical traditions, institutionalized rights, hierarchical structures, lack of focus in applied steering-mechanisms, and so on); or simply by the fact that attention moves away from the intervention effort over time, resulting in its fading away in the hectic “fire-extinguishing” logic of everyday production. The challenge of any Action Research intervention method is, then, to create a design that limits the opportunity to be overruled by uncontrollable forces, or that makes it possible to incorporate these into the interventional effort. Along

the same line of reasoning, intervention methods are often responses to partial challenges and single projects limited to a specific period of time. In our experience, a common logic of project establishment is as follows: The organization experiences a need, and sometimes invites outsiders (possibly action researchers) to help facilitate a solution; a joint project is established with the purpose of designing developmental activities; the interventional activities in the shape of for example dialogue conferences and seminars are implemented; and the project terminates after the project period. Thus, particularly if the single projects take place in the context of a long-lasting process within a large system, its effects will have a tendency to be limited by other contextual forces, and to be swallowed by the larger system. The interventional challenge in this case is to secure the long-term effects without creating fixed solutions which are unadaptable to future and unexpected elements, and to create solutions that in some way outlive and are not dependent on the frames of the single project. The traditional solution to this problem is to “train the trainers”, or to help the organization in ways that makes it better able to run future processes without dependence on consultants or researchers from outside, for example as found in Schein’s (1988) concept of “process consultation” vs. “expert consultation”. However, and maybe particularly in a large system, such instalment of capabilities is not just a question on internal knowledge and competency, but also one of the institutionalization of change efforts, and particularly of change efforts of a kind that can “compete” with other institutionalized factors, some of which are very strong indeed.

- 2) **Non-human actors:** A common objective for Action Research processes is the creation of relationships, participation, and democratic dialogues between actors and relevant stakeholders in, and between, the participating organization(s). Fostering democratic development through broad participation in dialogue-oriented interventions seems to be one of these common denominators, for example as explained both in the *Handbook of Action Research* (Reason and Bradbury, 2001) and *Introduction to Action Research* (Greenwood and Levin, 1998). The challenge visible in this literature is that when the relationships between human actors are put at the

fore, and become the figure, other relevant “actors” forming and structuring the dialogue run the risk of becoming under-communicated. They may be dealt with as empirical facts, or perhaps not treated as relevant actors at all. Examples of such structuring “actors” for dialogue and communication might be technological systems (particularly information and communication technology), the physical layout of production units, economic models, organizational theories, media and information campaigns, and so on. When the primary focus is on democratic dialogue and participation, one runs the danger of creating intervention methods which lack the capability to help the organization handle the continuous and *never-ending streams* of other highly relevant *non-human actors* as well as more and less useful fashions and fads. This is an analogue point to the normal critique directed toward a language-oriented epistemology, which points out the danger embedded in the eventuality of not being able to grasp the impact of material intervention upon the preconditions of language.

- 3) **Lack of enabling of leaders:** A fourth challenge is, as argued in part 2, connected to the role of individuals in general, and leaders in particular. The gist of this challenge is that the literature on leadership in Action Research gives us good reason to strengthen the focus on leadership when dealing with participation and democratic processes of development. Enabling an organization to effectively organize participation-based change-methods is often explicitly part of the goal in Action Research projects, and being able to effectively manage this over time normally presupposes that the leaders are capable of orchestrating such processes. However, leadership research and leadership development are not distinctly reflected as topics in the Action Research literature, suggesting that such continuous enabling of leaders is an underestimated effort in the context of helping organizations run better change processes – at least in terms of what is written or reported.

Taken together, these three challenges demonstrate a need to strengthen the institutionalisation of intervention methods in order to be able to transcend the limitations of single projects and to organize for disorganization, and thus hopefully contributing towards a more permanent mastering of continuous change. To

anticipate the analysis, the particular Reflexive Machinery – the integrated leadership-training program – is based on a combination of established AR principles for learning and development, as well as on the practical recognition of the challenges connected to single projects, regression effects and non-human actors. Moreover, it is an example of the institutionalization of intervention, and of a focus on enabling leaders.

In most large systems and organizations, enormous resources are spent on activities connected to leadership- and organizational development, despite the fact that the effects of such efforts are uncertain and difficult to calculate. This is partly due to the lack of proper evaluation methods; partly to (factor analytical) difficulties associated with trying to single out developmental effects from other variables; and partly to a lack of strategic adaptation and design for managing the overall challenges of the organization. It follows that the billions invested worldwide and each year on such developmental issues are not to any great extent legitimated by a calculated or measured payback or return of investment, but rather by beliefs in other quality criteria and forms of reasoning. Hopefully, the theoretical and practical experiences constituting this text can contribute toward improving the quality of this reasoning on the dimension of leadership and organizational development. The three challenges stated above point towards some important dimensions experienced when trying to close the gap between a “seminar reality” and the reality of “daily operations”, and especially the challenges associated with bringing developmental efforts into practical use.

Just to be sure, the concept of Reflexive Machineries introduced in this text does not have the ambition of (re-)present the wonder cure for the challenges connected to continuous change; nor does it attempt to promote a belief in quick fixes; or to produce the final empirical evidence. But by taking seriously the heavy efforts necessary for large system change, the ambition is to make a contribution to the overall reasoning on the sustained effects of interventions within large systems.

The Research Question in Light of the Theory Discussions

Part of the legitimization and maturation of the research question (*Why to integrate leadership and organizational development for the purpose of large systems change?*), grew from the many experiences with development projects (Part 4), and particularly by experiencing the crucial role of the local leaders' abilities to drive and orchestrate change processes – or also to block them. But as presented in this theoretical discussion on leadership research and organizational theories, it can also more indirectly be derived as a question of relevance from a theoretical perspective. As a summation of this part I will make the relevance explicit by revisiting some of the main arguments, both on an epistemological level on how to contribute to the knowledge production, and on a more substantial or thematic level on how to develop interventions.

One of the most thoroughly discussed challenges above is that of leadership research, and how to make leadership research less detached from practical development issues. This is also an argument for contributing to leadership knowledge by a closer relation to experiential knowledge production, as well as to broaden the focus, from a primarily individual focus, particularly seen in leadership development efforts, to an organizational focus. Generally it also means to construct a perspective where both individuals influencing social structures, as well as social structures influencing individuals, is taken into account. I will not further repeat this discussion here, but argue that the epistemological challenge can be further examined from a practical approach, and that the practical discussion of the research question (as attempted in Part 4), then becomes one way to test such a strategy for knowledge production.

A parallel epistemological argument for creating actionable knowledge in the field of organizational theory and development represents a well-established tradition, and can be traced through a long history of pragmatic perspectives, and particularly the contributions within the diverse field of Action Research. The examination here highlights that in this tradition there is a tendency to put more weight on the organizational and social systems' influence on individuals, than on the opposite, and one way to counterbalance this tendency is to introduce a stronger focus on

individuals, and in this case leaders. As such, it can be argued that the knowledge on organizational development might be further examined and built upon through an integration of leadership development issues as well.

Consequently, the research question is theoretically legitimized through a primary focus on interventions, and further grounded in the three interventional challenges introduced above. In particular, it relates to the challenges connected to single projects and regression effects, non-human actors, and enabling of leaders. These can be further discussed and analyzed through a case where the integration of leadership and organizational development is at the core, as well as through the projects leading up to this practical “test” of integrated leadership development. To sum up, the research question is also the main reason for introducing Reflexive Machinery as a concept of relevance, where systematization of reflexivity particularly refers to the actionable approach to knowledge production, and institutionalization of interventions refers to the interventional challenges. This link to challenges of interventions is further – both directly and indirectly – discussed through the analysis in Part 4, and they constitute the concluding remarks of Part 5. These concluding remarks to the overall discussion also have as an ambition of contributing to actionable knowledge, primary in the form of a generic summation of how to eventually deal with the challenges identified in a practical setting of large systems change.

Part 3: Method – Epistemology as Methodology

When organizational interventions become the focal point in an action oriented epistemological approach, it makes it slightly artificial to separate the method discussion from the overall discussion of the text. Method and methodology is deeply integrated in an interventional approach, particularly when it builds on a perspective where the methodology of intervention – the practical design of the interventions – represents both the research strategy as well as the intervention itself. As referred to earlier, the insights ascribed to Kurt Lewin, and to pragmatism in general; that trying to change a system represents one of the influential ways to get an understanding of the system, and further illustrates that the method for knowledge production and research naturally becomes part of the interventional strategy. Although it is for these reasons difficult to create a separate (traditional) part on the methodological considerations, and the ambition here is to identify and highlight some elements of relevance for a separate part on method.

This part on method and methodology is structured around two main axes: The *first* is related to the main reasoning connecting the epistemology and theory with method – from epistemology to methodology - as well as the identification of a conceptual apparatus that create (or constitute) metaphors later applied as a structure for the necessary complexity reduction of the main analysis. The *second* part digs deeper into the empirical material and how the coming analysis is rooted in particular documentations and observations made throughout the project's period.

3.1 From Epistemology to Methodology

For those applying an empiricist approach to organizational knowledge, and particularly those adopting scientific understanding from the natural sciences (as does for example Donaldson, 1996a, 1996b), there can be ascribed a rather clear cut conceptual construction of the division of epistemology, theory production, and

methodology. This division seems to be present and influential in the production of organizational knowledge today, and when one confronts the textbooks it seems to some extent represent a “division of labor”. Simply stated, those authors and textbooks dealing with the philosophy of science and epistemology, seems to a less extent to be dealing with applied methods, and vice versa. If so, important insights from the philosophy of science and knowledge production have a hard time affecting the applied methodology. The point here is to mirror such differences with a closer integration and link between the epistemology and methodology, and hopefully apply it as a more congruent approach. For this perspective “this division of labor” can be illustrated as a four-step ladder:

1. On the top we find the Ontological or Metaphysical level. This level usually represents the more speculative knowledge and works as a basis for the epistemological premise, and to the academic profession it seems to almost purely be of philosophical interest, dealing with existential questions such as the meaning of life and the position of religion, and the premise for human existence.
2. The next level can be labeled epistemology and is connected to the theory of science. This levels deal with theories on what knowledge is and the demarcation of scientific knowledge from other forms of meaning construction, as well as in principle what could be conceived valid theoretical knowledge within a substantial field. And of relevance for the discussion here, the examination of knowledge production on leadership in Part two is an example of such epistemological dimensions.
3. As a third level we can place a level of thematic and substantial theory. In this context substantial theory represents more and less generalized knowledge about and within a thematic area, for example a theory dealing with questions on what good or effective leadership is in the case of organizational change.
4. And as a fourth level of this ladder we can put what is called scientific method or method for knowledge production. This can be seen more as the operationalization of the epistemology and represents descriptions of how to generate valid knowledge and establish general substantial theories in a field. An example could be the many methodological discussions on how to deal

with factor analytical issues when sorting out variables in an attempt to explain leadership effects.

This simple division does of course not justify the scope of the discourses connected to these big labels, but in general it suggests a “division of labor” within the academic discourses. One can for instance read dozens of books about methods in social science, or substantial theories about this and that empirical fact, without any reference to their epistemological presuppositions. Also, one can read a lot of theories on epistemology without any references to applied knowledge production. Within organizational theory, and especially within the field of leadership development, this phenomenon can be added to the arguments in Part 2. There it is exemplified in the discussion of canons in leadership theories, where the reader is often indirectly and tacitly led to believe that as long as you follow the right methodology, and keep on going - “we just need to know some more”, one can in principle - and in the end - reveal the best definition and knowledge about leadership or organizational change. And as the same discussion highlights, such an paradigmatic approach, which does not connect to the epistemological premise, is in danger of producing knowledge of little value for practical purposes. For some purposes such knowledge can be justified, but for the action oriented approach applied in the area of leadership and organizational research some kinds of practical presuppositions are always at hand. Consequently, there are reasons to believe that a closer integration of epistemology and methodology could contribute to bring the knowledge production further, or at least contribute to taking the many discussions on epistemology more into account.

As a result of this division of labour it is tempting to generate a “substantial” theory: The last decades of development within the discourses of epistemology and theory of science involves a massive critique of the division of methodology and epistemology (For example the kilometres of books and articles produced to criticise positivism and strict empiricism in the social sciences). This massive critique of traditional social science has yet to really influence the way knowledge is perceived and produced within “the other” academic discourses or levels, such as the established traditions of leadership studies. And as in any division of labour, the coordination and integration of interdependent elements seems here to become the Achilles heel for knowledge

production. And as the theory discussion in Part two illustrates, the use of scientific methodology to create substantial theories continues, and is not necessarily affected by the parallel and enormous critique of its epistemological premise.

It seems useful, then, for the further development of the field of organizational and leadership knowledge production, to avoid the reproduction of such differences between “thinkers and doers” – or theory and praxis. And to produce a consistency of knowledge, the gap and dichotomy between epistemology and the practical methodology has to be handled by methodologies that are more directly epistemologically informed. This is part of the reason for highlighting the epistemological premise in the theory part, which represents and argues toward more experiential-based knowledge production. And a more experiential-based knowledge production is again related to pragmatic methods of interventions as research. The strategy, then, is here to establish a more direct link between the levels of epistemology and methodology through a pragmatic perspective where the epistemological reasoning sets the premise for a methodological outline with clear analogies to experiential knowledge production.

A part of this epistemological approach – highly influenced by the philosophy of language - is to see explanations as the use of conceptual metaphors, or language as both constitutive and descriptive or reductive. Such a strategy also sees language as a game of explaining something by using something else (as found in Wittgenstein 1953, 1994). And to illustrate something by using something else, e.g. through a metaphor, is how language works, and as such, how realities are both socially constructed and empirically given. For example, in the book “Metaphors We Live By” (Lakoff & Johnson 2003), they show, through empirical analyses of language, that everything that is not self evident through its use, is by and through language explained by something other than itself. It is a self-evident fact and part of the way language works, and can be said to represent one of the possibility conditions for the existence of language (like the ones found in Habermas 1996).

One important point, then, illustrating the potential creative and constitutive power of metaphors in constructing realities, is how explaining something with something else

can also be accomplished through the display of paradoxes⁵⁵. And, which is one of the purposes of the analysis, the observed rationalities and use of language in the system is attempted intervened in and understood through introduction of other or parallel (and paradoxical) rationalities. For example, a reappearing part of the analysis in Part 4 is how a social system partly dominated by a technological rationality and use of technological metaphors, contributes to excluding important parts of a rationality for social processes of change, particularly the language of involvement and participation. Part of the interventional strategy then represents attempts to intervene in this rationality and language in use through the introduction and application of concepts, models, and language more attuned to social processes (this is also what is meant by seeing organizational development as language development, or reflexive machinery as language translator, in Parts 4 and 5). In this way, a language-focused epistemology is directly linked to the theory of interventions, as well as the methodological approach of this Action Research strategy, rather than functioning as a “division of labor” between levels.

Further, discussions on methodology and organizational development within traditional empirical approaches are concerned with how to reduce the subjective coincidences in knowledge production or mere impressionistic production of meaning(s), how, by the use of methods, to “systematize reflections” to ensure the insights become more valid and reliable, or represent warranted descriptions and understandings of a situation. To systematize reflections through application and operationalization of method can thus be seen as the basic or generic approach for any knowledge production strategy. But when the contribution in actual processes is at the core of the knowledge production approach, as is the case here, the main differences lie in the definition of validity and reliability. Within a pragmatic approach, where “meaning is use”, when “validity is usefulness”, and knowledge should be actionable, or when production of new meaning, or real sense making, is production of new action and vice versa, then production of meaningful knowledge includes production of new practice. Since not all production of meaning can by definition qualify as “systematic reflections on action”, I think it is important to attempt to define

⁵⁵ For example it is exemplarily shown in the famous slogan attributed to Marshall McLuhan: “*less is more*” where he uses it to illustrate the logic of scarce resources, where a limited demand (less) creates an increased value (more). Literally a contradiction in terms, it nevertheless carries potent meaning through its use and application.

and keep knowledge production separate from more coincidental meaning production. Hence, to create knowledge, rather than more accidental meaning, one should in a pragmatic perspective establish epistemological criteria for “useful reflection”.

Although an Action Research perspective will for epistemological reasons never be able to create a fixed list, or prescribe detailed methodological recipes for how to go about applying methods, this epistemological necessity should not free the researcher from the obligation to try to establish criteria or reasoning able to create a divide between coincidental meaning production and useful knowledge production, just as is the case for the many texts on qualitative methodologies. It will go too far outside the scope of this text to give a full examination of such issues, but the list below will serve as my preliminary suggestions for such a separation, constituting the methodological approach applied in the coming analysis⁵⁶.

- First, knowledge production is directed and limited by the imperative of improvement and perfection of praxis leading towards a goal of development. Improvement links to the validity criteria of usefulness, and the accomplishment of “goals” is both the pragmatic foundation as well as the basic control question for actionable knowledge (One could then always ask: Does it contribute to achieve x or y?). General meaning production, on the other hand, has no necessary goal achievement as its foundation.
- Second, knowledge production demands structured design of arenas for productive reflections. The way the talk is organized becomes crucial for knowledge production; a co-creation of knowledge is about creating a system (co-reflections on actions), and the systematization can be conceived as a combination of structuring the process and bringing in external knowledge (see Part 4.5 for examples). Simply bringing voices together is not enough, although general meaning production, on the other hand, can exist merely as coincidental or unstructured social interaction, participation, and dialogue.

⁵⁶ This is to step into the large universe of theories on knowledge production, and boil it down to six bullet points. Consequently it is of course an oversimplified list, and as such it is to be considered as a personal starting point for this kind of reflection and integration of epistemology and methodology, and not as a fully elaborated reflection of the divide between knowledge- and meaning production.

- Third, in accordance with Wittgenstein's (1953; 1997) argument on the relational dimension of meaning production (the so called "private language argument"), all meaningful knowledge has to have a collective and relational dimension. Knowledge is formulated and constructed in and through language and is inescapably relational, as opposed to private. The relational (and here organizational) dimension is as such primary to the individual and private for knowledge production.
- Fourth, due to the practical nature of experiential knowledge, the production presupposes explicit, transparent, and critical reflections in, about, and through *practical actions*. The validity is connected to its possible use, and the activity of merely producing "theories on theories" will in such a perspective qualify more as ideological production (of coincidental meaning) than actionable knowledge.
- Fifth, knowledge production should contain elements of innovation and development (production), or new experiences within a social system, and be able to transcend the potential repetitive nature of existing discourses. Transcending the existing knowledge can as such be used as a premise and definition of "systematic reflections", in opposition to mere meaning production that can be both circular, stagnate, and become repetitive.

Such criteria can be applied to establish a shortcut between the epistemological considerations and methodological applications, or the practical and theoretical praxis. The point here is to give a brief illustration of the governing background – or the epistemology - for the approach and methodology applied, and how epistemological insights guide methodological ones. But as general and rather abstract criteria, they have to be further operationalized:

Epistemology Operationalized

The literature on methodology dealing explicitly with epistemological considerations and paradigmatic considerations gives no clear-cut recipes for handling actions and analyzing observations, or how to go proceed in the complexity of large systems change, but they might give some generic axioms or criteria (for example Guba &

Lincoln, 1985). This situation is due to the epistemological reasoning and its rejection of such procedures as invalid for social science, and particularly the inconsequence or lack of logic in giving strict procedures for more emergent or qualitative phenomena. The common approaches might be illustrated by examples and formulated as strategies for iterative knowledge generations, but not as strict tools or procedures and concepts directly applicable for analysis. Commonly these approaches also reject the ability to establish strict procedures (ibid.) It goes as an overall argument of the approach of this text that to deal with a field comprised of large and complex developments, thousands of people, numerous interacting variables in the constant flux of reconstruction, is something else than analyzing a fixed set of data. The methodological strategy applied is therefore to add a structure of action and reflection cycles not given in the field it self, but rather as a generic guiding principle for knowledge production (These guiding principles of division between observations, analyses, and actions have also been applied as the basic structure for my field notes and knowledge gathering throughout most of the projects.). The strategy has its parallel in Naturalistic Inquiry (Guba & Lincoln, 1985), for example, which establishes an iterative circle of knowledge generation going from purposeful sampling, to inductive data analysis, to grounded theory, and to emergent design. As interventions are at the core here, this iterative circle is not directly adopted, but applied with dimensions of actions and developments both in and on the field.

It is worth mentioning here that more esoteric versions of Action Research reject the division between everyday learning or meaning production and systematic knowledge production. And some also state that the lack of such divisions is the essence of Action Research, and that an ultimate purist goal of Action Research is to live to de-construct such distinctions, and to join existence and inquiry in every aspect of life, from spiritual, artistic, craft, exercise, and even sexual activities (Reason and Torbert, 2001).

For the perspective applied here, then, the consequence would mainly be a blurred distinction between knowledge production and what resembles ideology production on religious activities. In that perspective Action Research risks becoming a sectarian activity, and enters the complete self-referential closeness of religions. Consequently,

it risks refusing critique, by hiding it as semi-dialogues, and it similarly risks becoming perverted as a knowledge producing system. Instead of using the label research, one could just as well enter the self-referential value system of Buddhism, Kabbalah, and Scientology⁵⁷ to find answers for how to proceed. In the perspective applied here this is perceived as an insufficient strategy for Action Research. This reasoning is part of a larger debate, and here I will just argue for holding on to the “systematic” part of the reflection process as a premise for the idea of knowledge production.

When one introduces as heavy critique of the field of traditional (leadership) research as is done in this text, it could be interpreted as a pure self-maintaining activity, where the function is to construct a critical opposition and thereby accentuate one’s own contribution. For the sake of this text, this is basically a reasonable interpretation, but in order to justify a “self-maintaining” activity it is insufficient to end with the critique of the state of the field – which seems to be a normal activity in the academic world – one also has to create an alternative. And to be consistent with the critique, the alternative should not only be formulated in theory as a possible alternative, but also tested as an actual knowledge generating approach to see if it endures the practical judgment and “workability criteria” for validity. To do this I attempt to formulate a systematic way for experiential knowledge production, based on a simple and well-established model for experiential learning. Thereafter, in Part 4, I aspire to apply it as a concept to analyze action oriented knowledge production in the integration of leadership development and organizational development.

Methodological Concepts

The ambition of this part is to present the methodological steps applied for the analysis in the next part, or the main conceptual “tool” used to achieve analytical complexity reduction, as well as the criteria used for selecting and developing the analysis. The structure of this part can be sketched out through three steps:

⁵⁷ See Part five for further analysis of the risk of corruption and perversion in social and knowledge producing systems that are not balanced by their paradoxical nature. It is not to say that such religious systems cannot create meaning of great value for their participants, just that the lack of second order observation creates serious epistemological insufficiencies when it comes to establishing regimes of knowledge production.

1. The first step is to build some criteria for the selection of elements to apply in the analysis. These are presented in this part as general considerations and guidelines on how to select and highlight some elements from the potentially enormous material. The set of criteria does for example introduce elements connected to relevance for the research question, validity, academic and personal interest. These as are also contextualized further and constitutes part of the introductions to each of the four projects discussed in the analysis (see below and Parts 4.1-.4.5).
2. This set of criteria also forms the main basis for which projects to select for further analysis, and is used to legitimate a journey through three different projects (Parts 4.1-4.4), and shows how each of them contributed to an overall position and understanding, which later contributed to inform the project dealing directly with the integration of organizational- and leadership development (Part 4.5). As such the overall approach applied in the analysis is intended to show the gradual, though not linear, maturation into a project more integrated with leadership development. The selection is briefly mentioned below, and is elaborated and examined in detail in the analysis.
3. The third step is the introduction and description of the metaphorical model applied to structure the analysis of each project; a model for experiential knowledge production, and the logic of creating a division between key observations, key analyses, key improvements, and key actions. This model further illustrates the mutual and cyclical relations of actions and observations. The model is generically introduced here, and just as for the criteria identified, it is contextualized by giving the main structure for discussion of each project in Part 4.

The inescapable question in any methodological outline and reasoning is the argument for why the “always-already” complexity reduction at hand is accomplished in the way it is. Principally, as shown in the Introduction, the premise for some of the complexity reduction is part of the reduction itself, as part of the self-referential system of methodological reasoning, and it can therefore never be completely explicit. Consequently, the applied textual linearity of the analysis is to be understood

as a construction and constellation identified and made partly in retrospect, and not as linearity literally represented in the projects.

Criteria for Selection of Experiences and Actions

The quality of the material selection is crucial for eventually creating valid knowledge production in the sense identified above, as well as for steering clear of mere impressionistic constructions and selections. Also, within the traditions of qualitative inquiries there exists a large and diverse set of possible criteria to apply, while at the same time no direct or applicable or authoritative consensus exists as a basic guideline (and there are even examples of total neglect and rejection of the necessity of criteria). In the specific analysis of this text it is therefore difficult to directly adopt criteria from one of the many contributions in methods for qualitative research. But to the extent that the criteria developed here do build on existing work, it is reasonable to mention elements from “*warranted assertions*”, and the ambition of searching for data that both *contribute and disconfirm* main analytical elements. This is necessary in order to limit the trap and perhaps unconscious bias of one-sidedly searching for arguments, reasoning, and data that fit the main statements. The analysis is also influenced by Cuba & Lincoln’s (1989) *transferability criteria* for external validity, by its ambition to highlight elements that are capable of transcending the local language game and be of more generic relevance. And as argued above, validity is basically perceived in pragmatic terms, a perspective that can also be found e.g. in Argyri’s (2003) methodological contributions, as well as in many of the more epistemologically oriented descriptions in the Handbook of Action Research.

Further discussions on the use of the criteria listed will be applied in the analysis as an introduction to each project, where each of the categories below is related to the particular context. To start, and to establish a ground for the selection of particular projects, observations, and activities, the analysis will mainly be conducted based on the following six generic criteria:

1. **Relevance:** The first criterion is simply related to the ability (and relevance) to illuminate the overall research question. Each topic and project is therefore

selected on the basis of its relevance for the research question – as a way of securing the overall theme and consistent reasoning throughout.

2. **Validity:** The second criterion relates to the topic's generic relevance outside the particular project, as well as its ability to contribute to actions – as a way of transcending the mere local theory and gain applicable or actionable validity.
3. **Usefulness:** The third criterion relates to the link between observations and analysis, and their ability to inform actions. It helps to sort out the many possible theoretical analyses that potentially could be applied, and secure relevance for project actions. In short, the selection of observation and analytical points contains clear consequences for improvement activities and the actions made – as a way of relating the analytical validity to applicability and action.
4. **Further consequences:** This fourth criterion is intended to secure that the actions and experiences made create a continuation and relation to other projects, and that the insights generated from the project or analysis also have consequences for further projects – as a way of illustrating the historical cycle and spiral of development and maturation in experiential and action oriented research.
5. **Academic contribution:** The fifth criterion is connected to the ambition of relating the debate to other practical and theoretical debates in the field – as a way of securing its relevance for an academic discourse outside the more local project topics.
6. **Personal interest:** The sixth criterion is connected to the intuitive energy and interest experienced by the researcher (me), and will for each case present a short justification for why I find the topic interesting – as a way of putting the personal dimension into play, and avoid faking a neutral disinterest.

These criteria are to be understood as interconnected and are to be mutually constitutive for the selections made in the analysis. They are not strict, and are necessarily open for interpretation, but as a set they focus the selections made, and secure a reasoning connected to why the particular complexity reduction is highlighted throughout the analysis. The fact that they are meant to be mutually constitutive relates to the fact that many topics, for example, can be of personal or academic interest, yet lack the ability to inform actions, or that there are topics of

validity in each project, for instance, that do not contribute to later projects or the turn toward integrated leadership, and therefore are not of direct relevance here. Consequently, all of the criteria should ideally be represented in the selections made through the analysis. And as for any sets of methodological rules, there are no reasons for arguing in favor of exact convention or “rule following”, and the particular application will necessarily be influenced by discernment.

Substance reasoning on a topic connected to each criterion will be explicitly given and rattled off for the individual project. In order to anticipate the selection of projects, however, and give a short glimpse of the projects discussed through the logic of observations, analyses, improvements, and actionable derivations, the following projects are selected as foundational for the analysis:

- 1) A *Conflict Management Project*, where co-reframing of the conflict causes and project was part of the analysis and actions, and where the relation between individual and organizational dimensions is highlighted.
- 2) A *Consequence Analysis Project* of a planned shift in the organizational model, where interventions through feedback on the logic of organizational models was part of the analysis and actions, and where the first glimpses and conceptualizations of parallel rationalities and language in use are given.
- 3) A *Process Consultation Project* of a planned centralization of functions, where interventions in the different logics and rationalizations of centralization processes was part of the analysis and actions and further contributed to insights of relevance in order to understand the larger system.

These three projects are selected from approximately 12 projects, and work as examples of insights that were built over time and had consequences for both the professional maturation and relational network, which again contributed to the actual testing of an integrated leadership development approach.

- 4) The main project discussed is therefore the *Leadership Development Program – the Reflexive Machinery* - attuned to creating interventions on organizational development in general and the “fixed” concepts of “cross-functional and autonomous work teams” in particular.

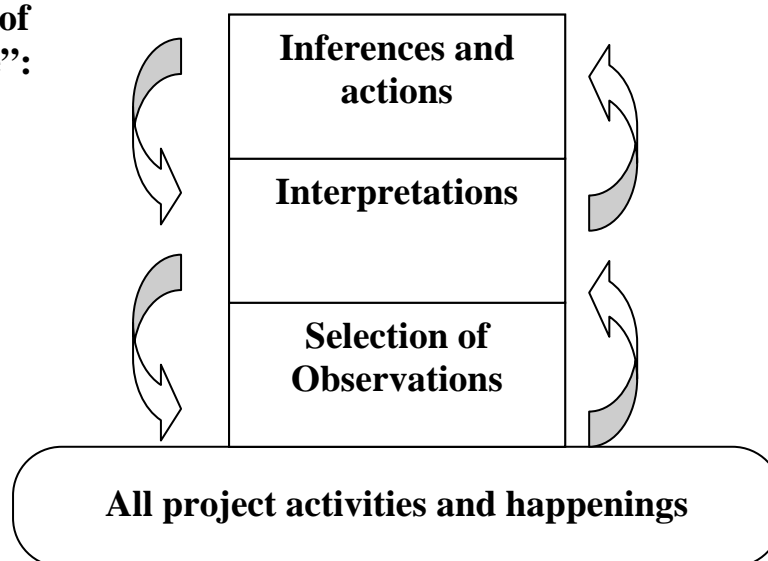
Each of these projects are discussed in detail throughout Part 4; each of the projects are analyzed according to the listed criteria and their developmental consequences. Further, the examination in Part 4 is structured according to the following metaphorical model for complexity reduction.

Main Conceptual Models Applied

As argued above, in order to guide the analytical process and to give the complexity sufficient reduction, both *in actions* and *on action*, in the project period, and for analyses made in retrospect, it is useful to apply some simple conceptual and metaphoric models that help structure the steps, or force linearity on a complex reality. The two models applied are generic models for “*Experiential Learning*” and “*The Ladder of Inference*”⁵⁸.

The ladder of inference is used as a guiding metaphor for the logic of going from experiencing situations to the selection of data, from the selection of data to interpretations, and from interpretations to inferences and actions.

(Fig 1)
”Ladder of Inference”:

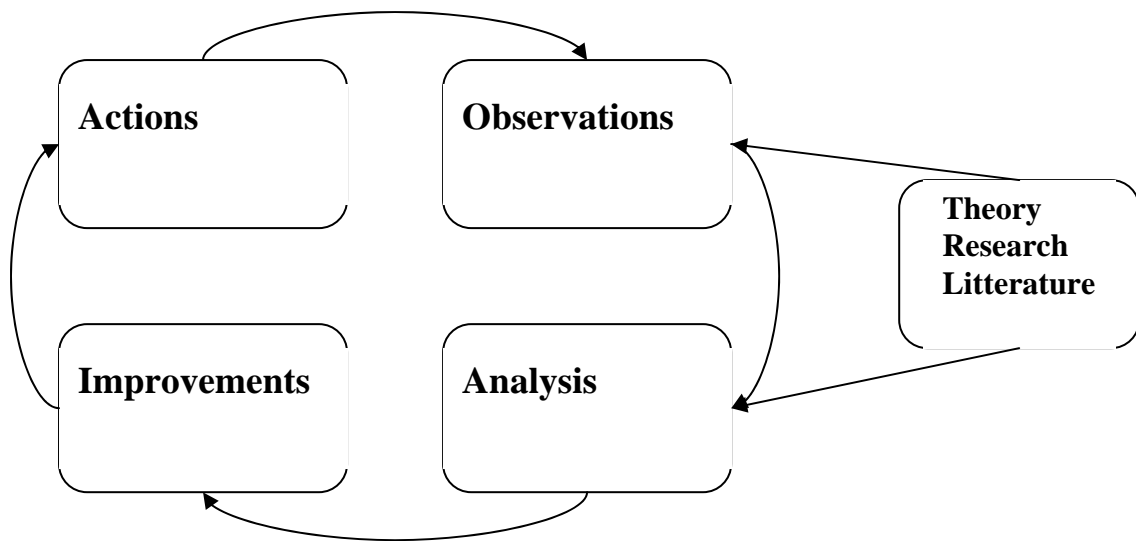


⁵⁸ As far as I know, the ladder of inference was initially developed by Argyris and Schon, and was applied by "Action Design Associates".

The ladder of inference is basically used to conceptualize the steps from observations to actions, and as such might be conceived parallel to the concept of “grounded theory” (as found e.g. in Strauss & Corbin 1998). But, as many theorists have pointed out, due to the practical impossibility of such purely “grounded” inferences or naïve inductions (e.g. Alvesson & Sköldberg, 2000), it is possible to apply the model as a guide for the opposite linking of inferences as well. As inferences – for example constitutive concepts – are also able to produce observations, and in this case, where actions work as inferences and are at the core of experiences, the inferences do also go top-down. To illustrate this duality of experiential knowledge production the arrows in the model therefore point both ways. Going back and forth between theory and grounded inferences seems to be a rather generic approach in qualitative inquires, and one conceptual term for such strategies is retroduction (e.g. Ragin 1994). For the more action-oriented and emergent approaches, the term *abduction* is also applied (Eikeland, 2003). In terms and concepts from the literature of methodology one could say that using both ladder of inference and reflexive circles for experiential learning in this sense can work as an initial *template format* to formulate further models for the relation between observations, analyses, improvements and actions. The duality of inferences for experiential knowledge production points toward a *circularity* as well as a two way process:

To highlight this circularity, the generic model for “*Experiential Learning*” will be used on the basis that analytical processes and knowledge production in action-oriented research, as argued in the previous parts, can contain some main structural similarities from experiential learning. As such, this model is simply intended to visualize the analytical process of knowledge production in action-oriented research.

Fig 2: "Experiential Learning"



In addition to the circularity of experiences, the model also contributes to visualizing the role of theoretical literature, research, and other “expert knowledge” along with the circular steps from observation, to interpretation, to improvement, to actual testing, and so on. This dimension is also important for the further analysis, where the role of knowledge and experiences from the “outside” are given a fundamental role in addition to the knowledge (co-)generated through participation. The argument is basically that useful interventions often have to transcend the existing language in use or the existing internal discourses, particularly if language stagnation of “lock-ins” is part of the interventional challenge. There is also reason to believe that the preoccupation with creation of participation processes in Action Research has limited the focus on knowledge not created through participation. Practical examples of this argument are particularly given in Parts 4.1 and 4.4.

This reasoning of “external knowledge” also connects to the epistemological divide of constitutive versus reductive concepts. Where the constitutive concepts are typically interfering with what they refer to - and are responsible for creation of reality – and the reductive concepts are characterized by being descriptive with no direct interference with their study of objects. Translated to interventions this refers to bringing in constitutive analysis able to allow for discourses of development, and for

example, in the case of conflicts discourses without external contributions might block the ability for development. As argued in Part 2 related to knowledge production on integrated leadership development, this dichotomy or continuum might create a research approach more able to integrate descriptive knowledge on leadership with more hermeneutical knowledge. If so, substantial knowledge on leadership of the reductive kind can be used to help sort out relevant observations and analysis of the constitutive kind, and vice versa.

The model of experiential learning can be traced to the contributions made by Argyris and Schön (1996, 2003), *but* I am reluctant to create a definite genealogy for experiential learning as knowledge production. In western philosophy experiential learning can be framed within an Aristotelian terminology (as e.g. in Eikeland, 2006), and in the literature on organizations and leadership development, and particularly organizational learning, experiential learning as a circular process of improvement is a rather generic concept and can be found in numerous readings (often cited are e.g. Kolb, 1984; Senge, 1990). In particular, it seems to be a common trait that loops of feedback on actions work as a general basis for all experiential learning or knowledge production. Theories of organization and leadership, then, are not only attempts to reflect and describe organizational practice, but even more so contributions to the constitution of organizational practice. Hence, through an independent role of external theories the model also brings in a relation between theory and practice that is not directly antithetical, but also part of the same circle.

3.2 Method – Empirical Context

The main empirical context, a presentation of the projects setting and the overall ambition for change – basically the “BOI” process and the according organizational change efforts – as well as parts of the history, are presented in the introduction in general, and through the analysis of the next part in particular. The point of this part is aimed toward a short presentation of the quality of the empirical material generated through these processes, the many projects, and how it will be methodologically applied throughout the analysis.

First, I will give a short description of the main *categories* of projects accomplished and what kind of data they primarily have contributed to generate. These categories of projects accomplished within the system basically sum up the projects wherein I personally have participated in the project group. This does not, however, give the whole picture, as both a long history of previous projects as well as some parallel projects represent part of the project context where the Work Research Institute have been involved. In order to ground the analysis and secure the experiential dimension, I find it useful to build on projects that include first hand experience. In addition to these categories of projects, knowledge is also adopted and generated from the history of earlier projects as mentioned in the introduction, as well as from numerous discussions with colleagues working with other projects within the same system (particularly the development of the Aasgard production unit, as described e.g. in Qvale 2002). *Second*, I describe the way the material is applied and how it is further discussed, as well as attempt to categorize the different and written sources that constitute the main data-archive from the work. The second part is done to give a picture of a wide set of inputs and how these inputs are narrowed down, but also to establish an internal possibility for tracing information back to the data and its documented forms.

Basic Project Categories

During the period when I participated, the general cooperation with the system had for the last five years had a formal form of “frame contract” negotiated by the project manager. Rather than distinct formal contracts for each project, we worked within a general frame of agreements and intentions, and the project resources were available within the limits of a cap set on an annual basis. The cooperation has currently been appointed on the basis of mutual agreements, and therefore many activities do not directly fit into the categories or labels of formal and distinctive projects. Although the main activities, and the ones chosen for further analysis, can easily be identified as separate projects, it is more difficult for other activities to identify what is considered a project and what is considered other kinds of engagements that have not been clearly demarcated in terms of contracts. One example could be the series of meetings with the staff of internal consultants discussing possible new strategies for development, or the development of new projects, participation in internal seminars, invitations to particular leadership meetings, preparations made for one-time conferences, and so on. With small and large initiatives included, and through the work of more than 15,000 man-hours in the project group, and more than 4,000 hours for me personally, it amounts to about twenty projects in total, with about twelve qualifying as distinct and separate projects in a formal sense. As mentioned, this is a sum of activities within and from which I particularly pick four *examples of distinctive projects* to illustrate both the process of maturation toward the research questions, and in part 4.5 a project directly dealing with it. To start, the following categories of initiatives and projects can be identified as main or typical activities throughout the period:

- Five projects have been in the category of **Consequence Analysis** of developmental strategies, plans, and initiatives. Consequence Analysis is part of an internal methodological regime in the system, and is basically applied in advance as a mechanism intended to identify and avoid negative effects on planned change and development projects. The processes of the Consequence Analysis have typically functioned as an entry point for further activities in each project. Typically, the consequence analysis has been a

formal analysis of future plans and the present situation, and the feedback on these analyses have built the relation and created appointments for further activities connected to organizational and leadership development. The basic methodological or interventional approach has been to apply the analysis merely as feedback for collective reflection processes of a more participatory kind. Typically, these analyses have contained different development processes, such as planned change of organizational models, improvements in departments, and processes on centralizing functions and departments. The basic logic is to create evaluations on high risk areas and to identify the necessary steps to better deal with the identifiable consequences. Two of the projects presented in the analysis of the next part started as this kind of project, and a more detailed description with examples is given there.

- Several projects have been categorized merely as **leadership-training and development activities**. The integrated leadership development program elaborated and examined in Part 4.5 is the main activity within this category, and in addition, we have had separate development projects for separate offshore production units, for platform managers across production units, for staff departments, and for groups and teams of leaders.
- Some projects can be placed in the category of **evaluation projects** on ongoing change programs, both for single platforms and for the larger system, as well as for the onshore staff units. These projects have been accomplished within a contextualized and general evaluation methodology, and the approach has been an approach that is often called “performative evaluations”.
- One project, the first project presented in as part of the analysis, has been an explicit **conflict management** project. Over a twenty year period, this project has built on conflict management methodologies developed at WRI during a series of conflict management projects accomplished in other organizations (Sørensen and Grimsmo, 2001), as well as on insights developed in my master’s thesis in psychology on conflict management. Since a part of this methodology has been to turn organizational conflicts into organizational

development, and as many of the typical conflict elements are also generally present in organizational change processes, both the analysis and methodology of conflict management has influenced the handlings of stressful situations in other projects. And even though it is just one example of such a project here, it might also be considered as one with a high degree of constitutive relevance.

- One of the overall project methods applied has been to establish and initiate a **development coalition** (a concept developed and found in Ennals and Gustavsen, 1999) together with the internal department designated to organizational and leadership development. This department consisted of professional consultants for leadership development and organizational development, as well as a set of experienced employees and trainees. Their mandate is essentially to facilitate for and run several of the larger development initiatives in the company. Activities of the development coalition ranged from internal education projects on how to facilitate participation driven processes, to direct cooperation in the design and execution of larger projects. For example, the integrated leadership program was completed in cooperation with this department, and it was also a result of the acknowledgement created together with this group on the need for closer integration of leadership development activities with organizational change efforts.

This attempt to list some of the projects and their basic elements gives an abstract picture of the main activities throughout the project period, and the concrete examples of the more empirical, practical, and detailed methodologies are presented in the analysis. They also give an illustration of the wide set of data available, and lead toward a presentation of which forms these sets of data have, and how they are applied in the further process.

Data Use and Application

In order to frame this, Part 1 can reintroduce considerations on the question of what is to be considered valid data for systematic and valid reflections in and on actions. And to further present the perspective applied here, I will start with an anecdote: When teaching project methodology for students' project groups at the university, an interesting assumption seems to reoccur for almost each group. Students often believe that only data obtained through their use of formal methods, usually structured interviews with a representative group, can be used to generate and report knowledge from the particular project. The notion is that "right-data" is data gained by imitatively following recipes on method. Rather often, however, they end up – like social scientists in general – getting to know a lot about the project or the organization through other sources than the formally applied method. Accordingly they also wonder how and where to fit this knowledge in, particularly if this knowledge represents content decisive for their conclusions. Sometimes they leave it out, resulting in a less informed report, and sometimes they pretend the crucial information fits the formal methods and "force" it on the formal material. In both cases, the use of the believed "right-data" gets them close to creating a lie for the reader, as important information is either left out or presented as if it occurred through a formal methodological setup. The narrow use of "right-data," then, ends up becoming more guiding for the knowledge production than the actual knowledge acquired through the project.

In most real projects one can experience the continuous production of knowledge, and important insights are extracted from many other sources than the formal interviews or methodical setups. One phone call with the director or an employee, a single decision or utterance made in a meeting, "funny business" revealed through body language, information from a drunken clerk in the pub, an informal project meeting, a coincidental meeting in an airport, an e-mail that goes astray; all have the potential to reveal more valid knowledge than numerous systematically performed interviews. The examples mentioned are also examples of actual sources experienced to have had impact in projects where I participated. Therefore, to answer

the question “What kind of data could or should be used?” in a pragmatic oriented approach, one has to look for the kinds of data contributing to the overall illumination of the research ambition, rather than creating “lies” by strictly following the systematic method. This simple insight will also guide the project presentation and analysis to come. Although each of these projects contains a large set of formal interviews and observations, the analysis is also highly affected by the participation in daily processes and often coincidental conversations with the actors involved. To create a point of departure for interventions, part of the analysis is made through highlighting elements of the daily language, or language in use, and their accompanying rationalities. To get a grip on the ruling daily language, other sources than just the formal interviews are often of great importance as well. As such, the main criteria for use of data applied here is more connected to *traceability* – the ability to identify an element’s origin - than a generation through more formally applied methodology.

Working in this particular large system for a project period of six years and more than 4,000 man hours, trying to list the exact detailed information and data available is not feasible. Therefore, the following list represents examples of available data sources and their approximate amount⁵⁹. They are, in accordance with the list above, only intended to give a picture of the broadness and actual use, and a more detailed application of them is discussed in the analysis. As such, the actual data presentation in Part 4 is basically selected based on the criteria established above, which is meant to secure their relevance as well as their potential ability to inform an analysis consisting of the loop going from key activities, through key observations and key analyses to key improvements. In short, rather than to list all the data here, the actual uses and funnelling of the elements from the following sources are identified when relevant in each project discussion in Parts 4.1 to 4.5.

Type of Data

Characteristics

Participatory

A bit more than ¾ of the total time spent (approx 3,000

⁵⁹ The numbers in this part are estimated based on a review of my data basis and written archives, and there might be some omissions and oversights in the numbers. Some meetings, documents, and reports could be left out by mistake.

observations

hours) can be categorized as Participatory Observations (the rest is essentially time spent on interviews, analysis, and report writing). The nature of these participatory observations has typically been to follow work groups with the purpose of getting to know the basic tasks, being part of project groups working with development issues, and working in cooperation with the internal OD consultants. These activities also include more than 200 hours spent at offshore production units, and roughly estimated it includes participation in some 200 meetings (the participatory observations are essentially documented as project reports and personal notebooks generated continuously – see below).

Formal interviews

Normally, the main projects have started with the completion of formal interviews based on questions and interview guides related to a relevant topic as a way of generating initial knowledge on the subject and organizational part. Basically, the strategy has been to start with interviews with a representative selection of employees as well as identified key actors. The main material is from regular employees and managers (in total approx. 500), labor union people representing all the main unions, as well as both their central and local representatives (approx. 20), in addition to a handful of managers and employees in HR departments and representatives from top management.

Electronic databases

At the moment, my personal electronic archive consists of more than 200 documents of various kinds: The most directly applicable ones include project reports produced as part of the project activities. In addition, the archive also includes background material of everything from benchmark

reports made by external consultancy firms, strategy plans, reports and documents of both a central and local kind, governing documents and performance measurements, inquiries made and reported by internal departments, work environment studies and reports, speeches given at seminars and conferences, and summaries and reports from meetings and seminars. (In total – if including all kinds of seminar programs, revisions, tasks, interviews, group works, production analysis, leader profiles, and so on, the amount of information would be more than doubled).

In addition, we also have a set of videos and CD-ROMs with presentation material, internal publications and magazines, annual reports, and numerous news articles from public media.

Personal notebooks Although all of the sources above have contributed to the general knowledge generated in the system, I argue that most important for the analytical process are my many personal notebooks from these years (approx. 700 handwritten pages). The individual notebooks covering each project – together with the project reports - also form the main sources applied in the analysis. From the beginning and through each project I have had a simple two-phase strategy for my notes: First, to write down statements and observations, as they happen “in action” (in a meeting, conversation, conference, seminar or other work situations), and basically based on an experience of “there and then”-relevance or assumed future relevance. Second, later these notes were subject to reflections “on action”, and the observations were particularly subject to and expanded

by analysis and further notes. These notes are also filled with insights and reflections made in conversations in the project groups, and the analyses are particularly influenced by this co-production of insights through de-briefs of particular actions and happenings (One of the benefits of being involved in projects mainly located in the Stavanger region was the extended time available to discuss and de-brief projects together with colleagues at hotels and on flights to and from Oslo.). And of course, my professional background and previous studies have all contributed to how these observations are interpreted. As such the notebooks are filled with notes of quotations and observations, experiences of the effects of micro and macro interventions, tentative and possible analyses, referrals from conversations, and simple “there and then”-reflections on actions and happenings.

For the actual projects selected for further analysis in the next part, the project reports, and my notes during the period in particular, constitute the main material explicitly referred to. As this table illustrates, all the available sources and kinds of data have a scope ranging quite far outside these projects in particular, and outside the scope of the research question in general. As such, the methodological selections and presentation of data build on the epistemological reasoning and conceptualization made in this part: *The project data is selected on the basis of the general criteria established and given structure through the application of the cyclical model of “key-“observations, analyses, improvements, and actions – where each part is informed by other theories and research in addition to the ones generated on a local basis.*

Validity Revisited

Summed up, in the methodological discussions validity and reliability can be translated into terms such as trustworthiness, workability, and usefulness, or one can keep the terms validity and reliability and give them a different meaning than the traditional positivistically oriented one. Either way, it all boils down to, in practice, to the potential ability of the researcher to apply systematic verification strategies and be self-correcting and less dependent on mechanisms extracted from a methodological toolkit in and of itself. As the literature shows (e.g. Guba & Lincoln, 1985), this is not a straightforward or simple procedure, and to apply consistency in such a strategy means to establish an epistemological background, to create generic guidelines from this epistemology, and further, to create some set of criteria and conceptual models to guide the process, and to systematize it in a way that diminishes the likeliness of a purely one-eyed or one-dimensional knowledge generation. This tendency to generate iterative processes and circular concepts and procedures for knowledge production (as in Guba & Lincoln, 1985) also connects it to the logic of systematic reflections on experiences. These steps also constitute the main approach outlined so far. Added to this comes the problem of traditional research perspectives; to transcend the theoretical sphere and become actionable knowledge. As discussed and illustrated in Part 2, and particularly “angle five” on validity, the most well documented and detailed theoretical models within a positivistic tradition display traits that make them difficult to apply, for example, in leadership development purposes, and the more generic and widespread models have difficulties gaining scientific support within the same regime. The strategy presented here – to overcome this dichotomy of traditional reliability and validity – is to focus on “action-ability”, and apply terms such as usefulness or workability. Within a pragmatic approach where “meaning is use” and “validity is usefulness,” knowledge should be actionable.

For this case the theoretical reasoning is established through Parts 2 and 3, and the next part represents an applied analysis with ambition to work within the epistemology outlined, as well as follow the criteria established in this part, or, in other words, to attempt to create a consistency between the theory in use and the

one applied. The rather disputed concept of validity is given its concretized meaning for this case through the attempt to produce knowledge in the field of interventions for integrated leadership and organizational development, and to produce knowledge hopefully less detached from its practical experiences and applications.

Within a general pragmatic approach where one makes workability and usefulness claims, one can not stop on the abstract level, but also needs to contribute to answering questions like to whom it might be useful, in what forms, where, and why. Basically, then the research question has to be operationalized through an analysis of more detailed and grounded cases, and this is done through the application of the six mutually constitutive criteria listed above, ranging from “relevance” through “usefulness” and “cyclical consequences” to “personal interests”. These are again applied through an iterative and circular conceptual model linking actions to observation to analysis to improvements, as well as to theories and research found outside the particular project.

To concretely inform the discussion of integration of leadership and organizational development through the discussion of the projects representative for building this question, I have selected three projects of particular relevance for the interventional development, which touch upon the interventional challenges identified. This is not simply done as a presentation of empirical description as such, but with the overall ambition to be informative for interventions in large system. For example, discussions of the relation between individual and organizational dimensions are highlighted in project 4.1.; typical roles of the outsider as well as early examples of integration of leadership and organizational development are highlighted in project 4.2.; the translational processes between, and the identification of, different governing rationalities in a technology dominated discourse are further dealt with in project 4.2, the role and understanding of differing positions and perspectives in a large system is grounded in 4.3, and these three projects are summed up in Part 4.4 in relation with the three challenges of interventions elaborated at the end of Part 2. These four parts, then, represent the first applications and tests of the methodological logic, as well as a background for the research question, and work as a prelude and glimpse into the elements further discussed in the actual testing of an integrated leadership development project discussed in Parts 4.5 and 4.6.

The overall discussion of interventions are further summed up in Part 5, where the experiences connected to the three challenges are revisited initially, the pedagogical principles applied are listed following that, and finally, the overall experiences from working in a large system are listed as the main considerations to apply if one wants to contribute to or work within a large system. Ultimately, then, as actionable knowledge is to be understood here, the *validity* and *reliability* of the choices and discussions made are not only to be understood as workability of the knowledge generated through each project, but also in the possible actionable knowledge summed up as “Conclusions and Contributions – Methodological Takeaways” in Part five.

Part 4: Analysis – Learning Cycles and Project Spirals

Related to the research question; “**Why integrate leadership development and organizational development for the purpose of large system change?**”, this analytical part represents a shift from an indirect theoretical and epistemological exploration, to a more empirically and practically oriented analysis and discussion. It also represents a storyline of gradual maturation and increased insights, leading toward the last project (part 4.5), where the integration is accomplished and applied on a more practical level.

The ambition of the analysis is to study closely an assortment of the many projects accomplished within the large system, creating a path from the first experiences, and building arguments for a more continuous focus on the integration of leadership development and organizational development. This includes an *indirect* journey, through three projects, towards the development of an integrated leadership training program - the Reflexive Machinery. The first parts of the analysis are indirect in the sense that they represent a process of new insights and analysis which gradually brings the relevance of the research question towards a more central locus. The main line of argument contains a narration going from conflict handling and organizational development, via centralization processes, towards a focus on leadership development and the integrated development of leadership and organization.

To demarcate the analysis of each project, the basic structure and the criteria outlined in the methodology part are followed, with an additional focus on identified “key experiences”. Rather than solely focusing on projects of explicit thematical relation to the research question, the strategy here is to probe more deeply into their background and development as well. The first three projects are thus selected on the basis of their being central for the overall maturation and creation of new insights for the project group as well as for me personally. These are experiences that are not necessarily of direct relevance for answering the research question; however, they are directly relevance for the way it developed. For example, when psychological attribution theory is applied in the conflict handling project, this helps create and conceptualize an understanding of the relation between individuals and

organizations, and thereby it generates indirect insights contributing towards an understanding of the integration of individual leadership issues and organizational development. And, for example when observations of the language in use in project two point towards a widespread use of technological metaphors and rationality, and the analysis illustrates the impact of such metaphors on the actions carried out, this indirectly contributed to the later acknowledgement of the integration of leadership and organizational development as also a matter of developing language and parallel rationalities.

As a written text, this represents an attempt to apply a linear structure of stepwise experiential development to a rather non-linear set of projects and maturational experiences. Consistent with the conclusions of the theory part, and applying the constitutive concepts elaborated in the method part, the ambition here is to apply the basic structure of experiential learning as a systematization of reflections on central experiences made in each project. This is not to be confused with the reality of the projects, which of course do not have such a pure structure, even though the main divides between observations, analysis, improvements, and actions have actual parallels in the accomplishment of each project.

The table below illustrates the basic structure of this approach. The table shows a linear presentation of a circular and cyclical process. Due to my ambition of applying action orientation throughout the analysis, I find it worth underlining that the actual validity of this setup does not depend on a grounded process of theory building. Even though each cycle starts with “key observations”, it does not represent a pure grounded process going from observations to a necessary set of analyses, improvements, actions and cyclical consequences or insights applied in the later projects. Rather, as justified in the method part, the main criterion for an action research approach like the one here, is to judge the quality of the selected observations and analyses based on the actions and interventions made, rather than the opposite.

As such, this action research approach differs from a standard grounded theory building, and gives primacy to the researcher’s actions – understood as the interventions – rather than to the observations. To again apply Wittgenstein’s (1953,

1997) famous insights: For such an approach the meaning and quality of knowledge lies in its application and use, and eventually in its ability to intervene. And on the other hand, giving primacy to actions does not mean that the quality of the observations and analyses are not considered judgeable by themselves, but that the basic quality of the observations and analyses is related to their dependency on and relation to the actions. Therefore, it is important to underline the circularity of these analyses, in order not to fool the reader into thinking that the observations represent the first and primary step of this process of experiential knowledge production – even though it is placed as the first step in the written linearity. Each project is partly summarized through a separate part named “experiential consequences” where the main elements of learning that are of importance and relevance for later projects are identified. The examination of each project is structured through the five steps of observations, analyses, improvements, actions and experiential consequences; and the main topics of each part is summarized in a table connected to the conceptual model of systematization.

As mentioned, in order to make sense of this schematic structure I consider it important to underline that the gradual maturation and development is also what eventually, in a later phase, led to the relevant overall research question. Consequently, and consistent with the overall epistemology applied, the research question is also partly a result of the experiential process, and more so than the premise structuring of the initial steps of the process. The following first three projects do not attempt to give direct answers to the research question, but together with the theoretical considerations, they convey some of the key experiences leading toward and ultimately legitimating the relevance of the research question. The experiential consequences of the first three projects will also be summated according to the intervention challenges identified, and given the labels of regression effects and single projects, non-human actors, and enabling of leaders part 4.4).

4.1 Project One: Conflict Management and Organizational Development

Introduction

A typical part of the complex dynamic of organizational conflicts is a multitude of versions of what the conflict is “really about”, and of who is the owner of the real version.⁶⁰ Rather than to take the role of a chief referee, or a neutral outsider, claiming the authoritative version of a conflict course, this multitude is part of the analysis. However, a short introduction is necessary:

All in all, the situation can be characterized as a long history of a broad set of negative work environment issues ruling an offshore production unit, and the problems ultimately came to a head and gained expression through a situation where one party was searching through sensitive material stored in the computer system, and which belonged to another party. The detection of this led to formal actions of dismissal on the basis of legal reasons in an area that at the time was characterised by a diffuse set of juridical rules, and involved complex discussions of who is the true “owner” of internal information stored in the common computer system. The actions taken were therefore disputed, and the episode accelerated latent dimensions of an already conflict-driven environment. Part of the point of the analysis is that even this general description of the situation would be disputed by some of the participants; and as the analysis below illustrates, part of the dynamic itself seemed to be that no one version of the situation was considered to be valid. In fact, we found through talking to those involved that there existed almost as many versions of “the real problem” as there were groups of.

This conflict management project was my first introduction to the large system in question, and as the project proceeded it was gradually re-framed into an organizational development project. The first activities involved extensive interviews, visits offshore, and visits around the country to make interviews with and get the version of those on leave, or on sick leave due to the conflict. It also included talking

⁶⁰ The term “conflict” is applied as a general characteristic of emotional, relational, personal and organizational disagreements that severely destructs work environment and inhibits cooperation at work. The more precise definition is to be identified as the analysis made in this case.

with people in formal roles, and actors who had tried to deal with the situation, such as consultants, priests and health care personnel. These activities led to the impression of being faced with a jigsaw puzzle of rather paradoxical dimensions. In short, a couple of people were described as the conflict's protagonists and as responsible for the conflict, while at the same time a wide range of different historical, cultural and contemporary situational aspects were used to explain the situation. This led to a search for possible ways of analysing the situation; and for analyses that would at the same time help solve it – as feedback actionable knowledge. In addition, the analyses further constituted the basic design elements for a series of interventions made in the form of seminars and conferences. Finally, the analyses eventually also contributed towards gradually re-defining the process into one that was directed more towards general organizational development.

As a link to the theoretical discussion, the conflict case is useful to more practically highlight some fundamental dimensions of the mutual interconnection of organizational and individual issues. It also provided some main learning points applied to the later projects in general, and to the integration of leadership development and organizational development in particular. This argument can be further supported through an application of the selection criteria:

Why highlight observations, analyses, improvements, and actions from this project?

- 1 Relevance:** *Their ability and relevance in terms of illuminating the overall research question – as a way of securing the connecting thread and consistent line of reasoning.* As mentioned, the contribution of this project is basically indirect, but some elements do also contain a more pronounced linkage. For example, the conflict at hand was initially framed by the participants as one between the unit's leaders and some of its senior operators. Its history of origin was linked to everything from organizational development processes, to illegal actions, and leadership personalities. And the extreme personal and individual focuses often observed in conflicts contribute towards illuminating and pinpointing important relations between individuals and organizations.

Moreover, the practical handling of the conflict integrated organizational development and individual development. Hence, the project explicitly contains some main issues connected to the general focus of integration of individual and organizational factors. In line with this reasoning, conflicts particularly tend to generate extreme versions of scapegoat and hero constructions, and these extremes have proven useful for illuminating parts of the underlying dynamic of any relation of leadership and organizations.

- 2 Validity:** *Their generic relevance beyond the particular project – as a way of transcending the mere local theory and gaining applicable validity.* Workplace conflicts can, as the analysis argues, be interpreted and understood as situations that lead to an extreme amplification of certain psychological dimensions of the normal organization of work.. This amplification of psychological dimensions can help us to better understand some of the rather normal psychological processes taking place within organizations. For example in this case, the attributions of stress and anxiety, and the corresponding social constructions of individual characteristics, represent an understanding of organizational dynamics relevant to almost any change and development process, and particularly in terms of understanding the attribution processes of relevance for leadership development.
- 3 Usefulness:** *The fact that their analytical points contain clear consequences for activities and actions carried out – as a way of relating the analytical validity to application and actions.* The particular actions carried out – the process of conflict handling – are fairly directly and explicitly linked to the way the conflict was analysed. On the empirical and substantial side, the analysis emphasises an organizational handling of what was basically considered “individual problems”, and on the methodological side it addresses the relation between “process consultation”, “expert knowledge” and “broad participation” related to the role of outside actors. Thus, the knowledge generated is characterized by the social construction of *constitutive* actions, in combination with *descriptive* and theoretical conceptualizations of the dynamics.

4 Cyclic development: *The fact that the actions carried out create continuation and relation to other projects – as a way of illustrating the historical cycle and spiral-like development of this kind of action-oriented research.* The conflict-handling project was, as mentioned, my first project within this large system after finishing my thesis in psychology about conflict handling. Hence, it was both my introduction to the large system, as well as a continuation of my previous training in organizational psychology. It represented the first small step into a six-year long and still ongoing involvement in the system. The project was timed parallel to the initiation of a large change process in the company, and it generated some of my first and most important experiences of life onboard “offshore production plants”, as well as experiences of large systems. The process of handling the conflict, the Work Research Institutes’ thirty-year history of projects in the system, and the parallel efforts of another large project at the time (the Aasgaard project, as presented in Qvale 2002), all in sum represented the connection points necessary for the opportunity to make a further contribution to the overall organizational change processes of the system. Furthermore, in terms of my personal experiences, the conflict handling project was what led to participation in the next project. Such experiential consequences are dealt with in the last part of this project analysis and divided into four categories: Consequences for further project positioning and development; consequences for analytical or substantial understandings of the organization; consequences for design of further interventions; and finally, consequences for the understanding of non-human actors.

5 Academic contribution: *The ability to connect to a theoretical debate in the field – as a way of securing its relevance for the theoretical discourse.* In order to further expand on the reasoning from the theoretical discussions of part two, particular emphasis is put on the complex relation between the influence exerted by individuals on their organisational structures, versus the influence of organizational structures on individuals. As this relation connects to large debates on several topics and levels within social science, this emphasis is intended to have some consequences for organizational development. And as discussed in part two, analysis of this relation is particularly relevant for understanding the role of individual leaders and their integration in collective

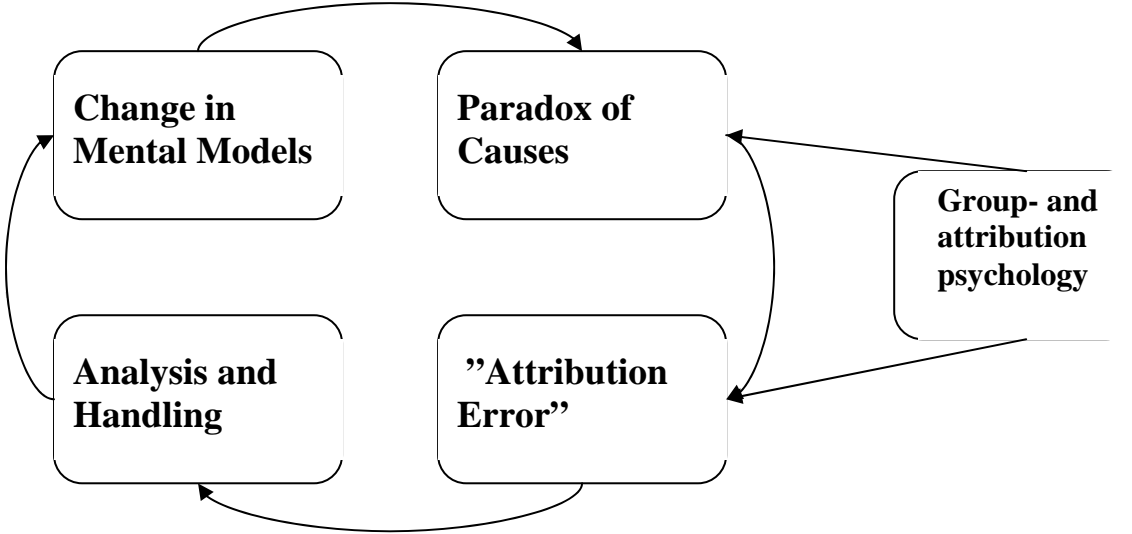
organizations. As the analysis highlights, the link between individual and social processes comes to the fore in organizational conflicts where the perceived need for attributions and the (social-) construction of scapegoats is high.

6 Personal interest: *Intuitive energy and interest experienced by the researcher (me) – as a way of openly disclosing the personal dimension and bias, thus avoiding the faking of a neutral disinterest in the research topic.* While writing about and dealing with leadership and change in large systems, it is easy and comfortable to do as most of the literature in the field does; namely to discuss the complex and large structures from a theoretical distance that does not contain the importance of the micro-psychological processes necessary to handle it, and eventually to facilitate real effects. I take a personal interest in the gap between the literature and research on the one hand, and the handling of the psychologically influenced and politicised matter on the other. Just as we find a similar gap between research on leadership and experiences on leadership, the detachment from “messy” experiences also seems apply to theories on large system change. This integration of micro and macro levels, theory and practice, individual and organizational concerns, represents the rational interest in conflicts. It might be rooted in an experience of “lost promises” of social science after studies in philosophy and the theory of science, and the (necessary) theoretical detour into the realization of the primacy of action. The obvious impossibility of “outsourcing conflicts” to consultants, or project groups, also makes conflict handling projects a grateful starting point for discussing the role of the outside helper, in this case the Action Researcher. A more private and subconscious dimension is linked to my perverse interest in the high emotional temperature, the adrenalin-driven anxiety ruling major conflicts, and the mastery satisfaction connected to being in the storm and finding a way out. My deeply rooted conflict aversion on the personal and private level may also contribute to this fascination.

The generic form below names the headlines of the four subsequent parts: Key observations, key analyses, key improvements, and key actions. These parts are

also presented in the model, which also suggests how they are informed by more traditional research:

Conflict Management and Organizational Development



After sorting the project through these steps, the personal learning and knowledge generation is arranged as a discussion of the role of the researcher (outsider), and concluded with a summation of some of its main consequences for the future engagement in further organizational development projects – i.e. its experiential consequences.

Project # 1	Key Observations	Key Analysis	Key Improvements	Key Actions	Experiential Consequences
<p>Conflict handling:</p> <p>This project deals with the analysis and handling of a conflict-driven offshore production unit. The unit had a long history of tensions in the work environment, which eventually led to a locked conflict situation, brought to the fore when one party gained insight into confidential reports and letters. The project also deals with how it, as a project and through the main analysis, contributed to the approaches applied in later projects.</p>	<p>Paradox of causes:</p> <p>The “original” and “real” reasons for the conflict were attributed by the actors to as many situational causes as there were people in our consulted sample, and at the same time only a couple of individuals were pointed out as responsible for the conflict, and for being the conflict’s protagonists. As such, the initial dialogues and interviews gave insight into a seemingly paradoxical explanation of the conflict.</p>	<p>Attribution theory:</p> <p>Is the general tendency to explain the behaviour of others based on personal factors and traits, and one’s own behaviour explained as based on situational factors? This tendency is amplified in situations of unease and contributes to our understanding both of scapegoat production and of the role of leadership in conflict - driven processes. In addition, the concept of “censoring universes” is applied to explain the self-fulfilling and accelerating divide between the parties, and the social dynamic of conflicts.</p>	<p>Integration of analysis and handling:</p> <p>The observations and analysis of the conflict illustrate that it is sometimes impossible to take the explanations given by participants at “face value”. Such insights have great impact on the assessment of how to design participation-based processes, and the analysis thereby has direct implications for the role of the researchers. The role of and contribution from outsiders balance between retrospect and future orientation. Finally, the cooperation and responsibility of those with formal roles is further highlighted.</p>	<p>Reframing mental models:</p> <p>After a broad set of “intervening” dialogues and interviews, the first action was to partly reformulate the project mandate to make it better fitted to the analysis. Based on the insights from the first steps, and through the integration of analysis and handling, a set of handling-conferences involving all actors was designed. Moreover, the analysis itself was also given the role of constitutive concepts during the handling process. It was reflected back and applied to the structuring of the dialogues from the seminar and conference.</p>	<p>Individual and organizational:</p> <p>Organizational conflicts amplify attributions towards the individual, and give insights related to understanding the connection between individual and organizational issues. Thematically, this is analogue to the relation of leadership and organization.</p> <p>The role of the researcher: As conflicts seem to be dominated by relational “lock-ins”, mere direct participation has to be balanced by authoritative outsider contributions. Authoritative outsider contributions are normally restrained in AR processes and such insights help nuance the role of the AR researcher.</p>

Key Observations: Paradox of Causes

Initially, the four researchers in the project group made extensive interviews with literally all the employees and adjacent parts of the organization. We arranged start-up meetings with the leaders, unions, and the individuals considered the core actors; altogether, we spent more than 200 hours at the offshore unit in the North Sea. We also talked to a set of other actors with roles of importance to the conflict, such as

priests, nurses, internal work environment analysts, and consultants, all of whom were involved in some sense. Through these interviews and conversations it became clear that inherent in the existing perception of the conflict there was an interesting paradox: The “original” and “real” reasons for the conflict were attributed to as many situational causes as the number of people we consulted, and at the same time, only a couple of individuals were identified as responsible for the conflict, and as being the conflict’s protagonists.

To give a simple picture of what seemed to constitute this paradox, we can look at some typical quotes describing the cause of the conflict in the initial interviews

- *“The hierarchical culture of the company nurtures and fosters conflicts”.*
- *“A cultural shift due to a company takeover twenty years back rooted it”.*
- *“A general lack of participation amongst the operators and workers is the main reason”.*
- *“It is a result of systematic lack of honest feedback in communication”.*
- *“Slandering is basically the communicative norm on this offshore installation”.*
- *“A one-sided and a negative interpretation of everything that is done and said seems to rule the conversations”.*
- *“A general lack of open communication dominates the ruling discourse”.*
- *“A lack of loyalty towards decisions is the core problem”.*
- *“A lot of suspicion exists amongst people”.*
- *“Insufficient and wrong information is often given”.*
- *“There is a general lack of trust between all parties, as well as lack of custom manners”.*
- *“There is a continuous violation of formalised rules and procedures”.*
- *“There are unfair systems of reward and a general experience of not being heard and acknowledged”.*
- *“It is difficult to bring in new information or to influence decisions”.*
- *“No one takes real responsibility”.*

The list is much longer, and is merely meant to illustrate according to the initial observation, a whole lot of situational factors were used to characterize problems in

the organizational work environment, as well as to describe the general conflict-driven situation. In sum, almost any dimension normally applied to describe a work environment was characterized in negative terms.

When descriptions of the responsibility for “the situation” came up, in terms of who was responsible for it, a rather different picture occurred. It was mainly attributed either to a couple of leaders, mainly one, or a couple of operators, mainly one. In short, the initial key observation was that these people were perceived as the individuals at “the core” of the conflict, and as the conflict’s protagonists. In addition to providing a large set of negative personal characteristics, some typical quotes illustrate the typical attribution of responsibility:

- *“A few strong personalities dominate the rest”.*
- *“A couple of operators tend to poison the debate and the overall atmosphere”.*
- *“The responsible leader is a coward and keeps running away from his area of responsibility”.*
- *“The leaders lack personal competency in dealing with relations and conflicts and are only occupied with tasks”.*
- *“The dominant and top-down style of leaders creates a lot of frustration”.*

And when suggestions about how to deal with the situation came up, a generally accepted view was typically: *“If we just got rid of x and/or y the conflict would dissolve”.*

The paradoxes of the causes of the conflict was then observed to be related to the pronounced tendency to focus on a large set of situational factors, while at the same time placing the responsibility on a couple of individuals. This paradoxical observation seems rather normal when working in stressful environments, and is basically the basis for the social psychological definition of “fundamental attribution error”, which was applied as one key analysis of these observations.

Key Analysis: Fundamental Attribution Error

In social psychology the systematic and general tendency to explain the behaviour of others as based on psychological states, personal factors and traits, and one's own behaviour as based on situational factors, is named "fundamental attribution error" (Ross & Nisbett, 1991). Different theories seek to explain this kind of attribution error, and one common explanation is connected to "human information processing factors": When we observe individuals in shifting situations, what we tend to focus on is the constant person; and thereby their behaviour is more likely to be explained in terms of personal dimensions. At the same time, when we – ourselves – as first persons act in situations, what we most easily observe are the external factors influencing us to do the things we do. This normal state of overly explaining other people's behaviour based on personal characteristics, and one's own behaviour based on situational characteristics, seems to be amplified in conflicts. In conflicts, there is an even stronger tendency to attribute the causes of others' behaviour to individual characteristics, while at the same time attributing the causes of your own behaviour to situational factors (Sherif, 1966 in Nisbett & Ross, 1991). And if we add psychodynamics to the "information processing perspective", and apply the concept of projection of feelings as a form of attribution, it is reasonable to state that the unease (or anxiety) produced in a conflict-driven environment both influences and strengthens this kind of attribution error. The more or less subconscious redirecting or projection of strong feelings contributes towards creating a "dependency" upon conflict protagonists (e.g. Miller, 1993).

The observed paradox of rooting the conflict in historical, organizational, work environment, and overall situational causes, and at the same time attributing it to a couple of persons, can be analysed in terms of such attribution theory. In short, the heavy feeling of unease experienced by the people in the organization with the conflict-driven environment – explained by complex and paradoxical situational factors – seemed to be attributed or transferred to a couple of people, thereby contributing towards creating a (perhaps illusory) structural stability in the anxiety-producing complexity. The causes seem simply to be reduced to what appears external and stable in a chaotic setting.

In this way attributions and attribution theory give insight, and provide possible tools for understanding the paradoxical tendency, as well as a tool to investigate the

relation between individual and collective dimensions in organizations. Work environment conflicts are considered by definition to produce a general state of unease, and a likely interpretation is that the individual's need to create a distance to this unease serves to produce stronger drivers towards such attribution errors. A well-functioning work environment is normally a collective responsibility (not formally but practically), and when it is no longer experienced as possible to take responsibility for the situation, as in conflicts, the general force of attribution seems to grow stronger. A large number of other organizational states do of course also produce an experience of unease that results in heavy attribution mechanisms through the lack of responsibility, and during organizational change processes this tendency is rather commonly observed. In change processes, as organizational structures are under transformation, leadership often becomes highly visible, and this kind of attribution theory can be used to understand the projections and increased focus on leadership that often appear in change processes. As such, it also helps us acknowledge the important role of leaders in change processes, particularly participation-based ones, and possibly also how leadership development and increased awareness of these issues might help to run such processes.

As a cyclical process the projections and attribution also affect the actions of the individual target, and these characteristics can thus be conceived as "constitutive concepts". This applies both if the scapegoat is the person formally in charge, such as e.g. the leader, and if the scapegoat is someone with more informal power. The process is cyclical in the sense that attribution processes go both ways, and in that the individual reactions to attributions reflect back and affect the organizational functioning. In this case the attribution toward leaders might lead them into even more defensive positions and make them act the way pressured leaders with raised guards often do: They become less likely to openly share ideas and plans, holding their cards closer to their chests; they spend even more time on creating structures of control; they engage less in participation; give less positive and constructive feedback; develop a generally more dominant and rigid leadership style, and so on. All these factors were observed here, and they also engaged in similar attributions of responsibility towards individuals. And of course such actions and behaviour again gave further fuel to the negative attributions, and had the overall effect of fostering the negative developmental spiral and "lock-in" situation typical of conflicts. The

“fundamental attribution error” can, then, be used as a conceptual tool to analyse some of the typical patterns occurring in conflicts, and as a phenomenon amplified in many normal leadership situations. Furthermore, its self-fulfilling and spiral-like dynamic can be used to analyse some of the self-fulfilling processes of conflicts as well as other social processes.⁶¹ For the purpose of investigating further some of these dynamics, I will add the concept of “Censoring Universes” to sort out observations in this conflict case.

Censoring Universes

I highlight the attribution theory for the purpose of illuminating the relation between individual and organizational factors, but it is worth mentioning that these analyses were added to applications of social theories on how sub-systems develop as oppositions within a larger system, such as for example in social identification processes, and in relation to how a basic “us” and “them” accentuation of identity also tends to be amplified in organizational conflicts (e.g. as found in Sherif, 1966 in Ross & Nisbett, 1991). Conflict-driven work environments are generally characterised by negative coping with social cooperation, almost as a premise for developing and nurturing conflicts (Winther, 2000). The typical traits of negative coping (mastering) in a work environment dominated by conflicts were also typical for this case. The “lock-in” effect of the conflict was strengthened by some rather self-reinforcing dynamics:

Typical examples were exaggerated tendencies to look for explanations that confirmed the picture one already possessed of the situation, particularly in negative terms, and normally directed towards “the others”. This amounted to interpreting every action taken in negative and destructive ways: For example, initiatives that would normally be considered positive contributions to a work environment were framed as something suspicious with a hidden agenda, or as someone trying to ingratiate themselves. As a typical consequence, the ability to handle normal conflicts was destroyed. And when one experiences that the ability to handle conflicts is gone, a typical trait is to flee from or avoid the relational problems. This tendency was observed to constitute everything from increased sick leave to abnormal preoccupation with professional details. And when problems are avoided, making

⁶¹ For instance Robert Merton’s (1948) concept of self-fulfilling prophecies is a useful theoretical path for organizational dynamics.

mistakes becomes dangerous, and the ability to constructively learn from errors is accordingly ruined.

In this situation it also seemed that a typical dynamic was to recruit actors into subcultures, with strong divisions between “us” and “them”. And the normal observation was that the subgroups spent almost all the resources available to them on discussing and confirming the picture of the many errors made by “the others”. Coffee breaks, lunches, and spare-time hours were spent nagging about “the others”, and every new rumour or input that could confirm the picture was legal tender and highly valued. The only information acceptable was information that confirmed the picture. Without any public spheres to validate the interpretations, each of the subgroups worked as social-construction-machines, digging the gap between “us” and “the others” deeper and deeper.

Negative stereotypes were confirmed, both about “the others”, and about what “the others” think and say about “us”. Rumours and alternative information spread at a higher speed and was subject to greater attention than formal information, and the internal communication between the groups was rather non-existent.

Based on this short description and analysis of the case we can say that the basic and historically well-known logic of both small and large conflicts seemed to rule the dynamic: *“Either you are with us, or you are against us”*. This simple dichotomy fuels the conflict further, it makes it impossible to stay neutral, it speeds up recruitment of supporters of either one side or the other, and it blocks the potential for democratic dialogue and participation. Furthermore, the primary preoccupation with “blamestorming” tends to create a focus directed toward history and “who are the ones really responsible” for the origin of the conflict, rather than on future coping and handling. And in this case, the retrospective focus on what constituted the “real cause” seemed to produce a time and energy consuming – and potentially eternal – fight about definitions and interpretations.

The impossibility of staying or being a neutral also seemed to apply to those with formal roles normally involved in work environment issues and the handling of disputes and conflicts. In addition to the leaders, these are normally the trade unions, the staff of safety deputies, offshore health care personell, and offshore priests. In

this case, some were directly involved as “main actors”, and some were allocated a role as supporting one side or the other as a result of their actions. For example after some of the attempts to get help from the health care personnel, the simple fact that they had arranged a meeting with one party before the other, was immediately taken as confirmation of their support for this side, against the other. And this inscription from the environment made further actions impossible. The picture was completed by a strong tendency amongst those who held formal roles to define the conflict in terms which made it clear that in their view, the main responsibility for its handling rested with others groups holding formal roles. The safety deputy staff highlighted elements that made it look like a case for the trade unions; the trade unions highlighted elements that made it look like a case for the leaders; and the leaders wanted the health care personnel, priests and trade unions to take responsibility.

Key Improvement: Integration of Analysis and Handling

The collective attribution of organizational problems to a couple of people also gives indications for improvements and how to handle the conflict. For instance, if these observations and explanations of causes were to be taken at their face value, without any further analysis, or without any connections to more general theories on conflicts, one might be led to believe that some conciliation between the few conflict protagonists would solve the problem. In the previous efforts to solve the conflict such an approach had been attempted. Professional conciliators with a theological background, as well as some applying individual therapist approaches, had “solved” the conflict through meetings and seminars with what was thought to be the main actors. They had reached some principal agreements on how to relate to each other and how to further deal with the situation. These approaches were essentially based on the explanations of the employees and leaders, which all pointed towards a couple of leaders or employees as the main actors. Although actions were taken that focused on these individuals, there were no signs of improving conditions amongst the remaining work force. For the rest of the organization the conflict lived on, the dynamic of attributions and censoring universes persisted, it was smouldering on as unfinished business, and the general observation was that the “main actors” were soon to be re-enrolled into the conflict.

As a starting point, both the analysis and the observed effect of previous attempts at handling the conflict pointed towards a broader approach where the whole organization (the whole department) had to participate. I will here outline the key suggestions for improvements and their link to the observations and analyses within four topics: Firstly, the introduction of external consultants and researchers; secondly, considerations about who to involve in the process; thirdly, the balance of focus on the past and solutions for the future; and fourthly, the creation of joint future cooperation.

Firstly, one can always create good arguments for why a work environment conflict has to be handled by those involved, and intuitively for the fruitlessness and impossibility of “outsourcing” a conflict. In general, it is also favourable and desirable for long-term mastering to de-build dependency upon external consultants for solving internal problems. Most organizations I have worked with see internal cooperation as a field where external forces are basically involved to increase the organization’s competency, rather than to take over the processes. Even though some people heavily involved probably want to call for external experts to “save them” from a hopeless situation – due to the emotional stress – there are good reasons for saying that conflicts are prototypical situations where every party easily sees and accepts that constructive handling is no consultancy quick fix, and basically has to involve the organization. But as the analysis above indicates, the internal actors normally involved in handling cooperation problems, such as staff of safety deputies, trade unions, and leaders, had huge problems being perceived as neutral parties. Due to the conflict dynamic that forced everyone into conflict positions, those holding formal roles were more and less involuntary enrolled into the conflict, and the legitimacy necessary to orchestrate a handling process had in most cases vanished before they were even able to start.

Consequently, even though the recourses were formally available from within, the practical handling became close to impossible. It seemed like the destructive spiral and self-fulfilling processes of the internal system became self-referring in a way that by necessity created a need for external input. And even though every intuitive organizational logic points towards an internal handling of conflicts, the dynamic

created a situation where external resources might be one of very few avenues available for handling the conflict, or for securing the legitimacy and acceptance needed to structure and design a broader process. This illustrates that the relational “lock-ins” created in heavy conflicts serve to create a different need for external help than more common problems related to organizational cooperation.

Secondly, the analysis based on the attribution of causes, and the creation of censoring universes, points towards a broader involvement in the handling processes. For those involved, the attribution of causes and the censoring universes are not considered “just possible interpretations”, or the result of constitutive concepts, but rather the actual truth. For them, these displayed the truth about the actual situation. Both sides could say things like: “*The others are lying and defending their own actions; they refuse to look reality in the eye, have no respect for the truth and are just too proud to admit their flaws*”. A part of the conflict dynamic was also to “demand” that the other party admitted their flaws before one got involved in a process of communication. In short, the continuous and long-term experience of not being able to get their version of the situation across, the total destruction of normal communication patterns, created an almost infinite need to be heard and understood. This clearly pointed towards actions involving everyone’s voice and version and the need to create arenas for an understanding based on a more common ground. The details of this process of giving voice to the different conceptions of reality are further elaborated in the part on key actions.

Thirdly, the analysis points towards a rather common tendency in work environments driven by problems of cooperation and general stress, namely the tendency to continuously put everything in retrospect, to look backwards, and to be more concerned with problems of the past, than solutions for the future. In research and literature such tendencies to decay into a culture of retrospective “Blamestorming” is considered a self-fulfilling organizational energy loss, a destructive and black hole for productivity; and it works as one of the basic premises for approaches referred to as “Appreciative Inquiry” (Cooperider et al. 2000). The basic points of these approaches are that the biggest problem of all is to be stuck in the analysis of problems, that a focus on problems makes the problems even bigger – particularly when the problems are of a relational character – and that problems create time-consuming loops of

relational “lock-ins”. The result is unproductive organizational cultures spending a huge amount of their time and resources on problems – rather than solutions. On the other hand, the idea is that when it comes to relational aspects, organizations get more of what they focus on and the solution (sic) is to steer attention towards discussions of future solutions, rather than historical problems. Not to reject the existence of problems, in other words, but to mirror problems with their solutions, and turn the discourse likewise.

The basic idea is that the turn to solutions will contribute to a shift from a state of negative energy consumption, and into a more positive energy producing state. And contrary to the normal conception that one has to know where one is to be able to know where to go – and its basic logic of the need to create evaluations and maps of the present state in order to be able to plan for the future – these approaches see the analysis of the problem’s history and the present as one of the problems, rather than a solution. Thus, they often advocate a view where the only important focus is on identifying where you want to be in the future, rather than one that dwells on and gets stuck in problematic analyses of the present (e.g. in the Norwegian context, the “LØFT” methods by Langslet, 1999, have particularly enjoyed a widespread popularity).

All in all, this seems to be a seductive approach: Who would not want to work in an environment characterized by positive discourses directed towards collective and future solutions, rather than in an environment stuck in its previous errors and problems? Who has not experienced the time-consuming and depressive state of whining, blaming, and struggling with historically persistent problems? And if you work as a leader, wouldn’t you rather spend your time with employees focusing on common future results than with those preoccupied with historical flaws? Moreover, the seductive characteristics of this approach may be well suited to an action-oriented culture of organizations, where the basic point is to get things done. These factors may well account for what lately looks like a quick and wide diffusion of the approach.

However, a short digression might help to create some nuances in the picture: I was once engaged in a short-term project in a Norwegian finance institution which had

completely adopted such an approach – at least on the management level – and among their set of five explicit basic organizational values was one that was formulated as a ban against being preoccupied with problems in general, and particularly with problems of the past. How widespread these official values were in the practicalities of everyday work was difficult to estimate, but it is easy to see some immediate shortcomings if they were applied. The organization's collective memory of errors would diminish, and accordingly, the ability to learn from mistakes would disappear. We can just fantasise about the many possible disastrous consequences of such an organization, and perhaps rejoice in the fact that company values are rarely completely adopted by employees. Appreciative Inquiry and its diverse set of methods and applications is quite possibly both effective, stimulating for the work environment, and an avenue to good results in many normally functioning organizations. In heavy conflicts like the one dealt with here, however, the analysis gives us reason to believe that a handling based solely on the premises and principles of Appreciative Inquiry would have ended in the same way as the approach which solely focused on the “main actors”.

As the general stories of the conflict were extremely backward-looking and concerned with blaming of the past, it was of course important for the internal culture to change this state of affairs into a more proactive and future-oriented approach. But as almost all of those involved had invested an enormous amount of time and resources to prove their version of the history, the particular stories were highly connected to personal prestige. In combination with broken communication patterns, a continuous fight to get “our” version confirmed, and a collective experience of not being heard, we assessed it as likely that a ban on these personal stories of past difficulties would just increase the problem, and confirm the general experience of not being heard. Part of the improvement, then, was to find ways and arenas to let these stories out, to give them a public voice, and thus make it possible for the narrators to put the stories behind them. According to one of the most experienced work environment conflict handlers at WRI (Aslaug Hetle, 2000) – based on her history of handling a few dozen conflicts – there is also a more common experience that in the wake of conflict handling focusing solely on future solutions, the conflict has a tendency to reappear. The main reason is that “the skeletons are still lurking in cupboard”, and those involved live with a feeling of unfinished business. The crux for

handling the situation, then, became to find space for and to let the stories out of the censoring universe without reproducing and being trapped in them.

One of the main logics contributing to this balance was to do as in the analysis above and show the different versions of the conflict as a being part of conflict dynamics. This was done basically by collecting the many stories through interviews and conversations, followed by the creation of an overview of the different versions. This overview, together with the other analyses of the conflict, was then reflected back as general ground for discussion both in seminars and conferences as well as in written reports. This systematic and common sharing of stories laid the basis for seeing one's own version as one of many experienced perspectives, as well as forming part of the conflict dynamics itself. This also prepared the ground for starting to get out of the "censoring universes" and looking into the future handling of cooperation.

And fourthly, the analysis gave some indications on how to deal with future cooperation. Part of the conflict handling consisted of attempts to establish new agreements on future abilities to handle conflicts, particularly based on the observations that none of the formal roles were able, or wanted, to take direct action and responsibility for conflict handling. It is difficult to say that they did not fulfil their formal roles, as long as it was possible and reasonable to analyse the conflict in various ways, and thereby define these tasks as some else's responsibility. Thus, one of the improvements necessary to improve their general preparedness for conflicts was to create a more systematic cooperation between these formal roles, to define the responsibility for the different aspects of the work environment as more of a common matter, and to introduce formal procedures fostering cooperation rather than repudiation of liability. In addition, the analysis pointed toward a lack of everyday collective arenas used for the calibration of sense-making, both in different groups or sub-groups, and for the organization or department as a whole. More permanent or frequent arenas fostering open and collective discourses were also part of the general improvement.

The concepts and analyses connected to censoring universes; fundamental attribution error; balance between retrospect and future-oriented discourses; as well as lack of perceived responsibility amongst the holders of formal roles, all identify

mutual rationalities for improvement. These four areas were selected here as key areas for improvements, and in the next I will elaborate on their connection to some of the more specific actions taken.

Key Actions: Reframing Mental Models

It is worth mentioning that what was a long history of conflict-driven work environment and completely locked situation, also had its positive sides when it came to designing and initiating actions for change. Those who were in the midst of the conflict were tired of being in a conflict-ridden environment, and there was great motivation for change. Even though many of the previous attempts at creating improvements had contributed to a “learned helplessness”⁶² when it came to coping and mastering strategies, a substantial number of those involved was ready for change. This probably provided a better starting point for the ability to (re-) formulate the project contract than what is normally the case for less urgent situations.

One of the first actions we carried out was connected to the premises for the project. As discussed above, there was a strong tendency to blame the conflict on a few protagonists, even though everyone was aware of the long history of heavy and broad work-environment problems. This tendency also dominated the early versions of what was “really” to be considered the problem, and as such it also dominated the descriptions and explanations of the assignment given to us. These descriptions and explanations were given particularly in the first meetings with leaders, union officials, and those considered to be on either side of the conflict core. Based on previous experiences with conflict handling and through discussions with the more experienced conflict handlers at the WRI, we were aware that one has to be particularly cautious in the contracting phase of conflicts. Part of the conflict dynamic is often mirrored in the way the assignment is formulated, and those formulating the assignment are often enrolled in the conflict in some way or another. One of the first actions taken was therefore to use these first meetings to partly re-formulate the assignment, and to get acceptance for a wider work environment improvement

⁶² “Learned Helplessness” is Seligman’s (1992) term for the state of passivity and depression resulting from an experience of lack of control after repeated and failed attempts to change an unwanted situation.

project involving conflict handling activities. Thereafter the mandate was generally formulated as a process to help identify central and important points of learning for the organization, as well as to integrate this learning in the organization.

The *second* main activity was to carry out interviews with everyone who had a possible connection to the conflict. The general questions were formulated in a way that would provide a wider picture of the different versions of the work environment as well as of the origin of the conflict. It seems reasonable to name these interviews *interventional interviews* given that the formulation of the question and the structure of the interviews also inherited some interventional qualities. As the mandate was re-directed toward the creation of learning and development, and not defined as creating the authoritative description of the situation or to find the definite source of the conflict, the interviews, too, were structured to foster learning. Even though it would be an exaggeration to call them therapeutic, most of the interviews had a basic structure of “coaching conversations”,⁶³ and indirectly aimed to both give a foundation for analysis of the situation, as well as serve as preparations for further activities. The interviews were typically sequenced through five steps: First, we asked about descriptions of the general situation, emphasising the effort to share the full story as perceived by the narrator, including its main problems and the understanding of causes. Secondly, we proceeded according to a more co-explorational approach, checking for possible alternative interpretations and ways of framing the situation, as well as asking the interviewees to consider how they thought other people had reached their conclusions. Thirdly, we shifted the focus more towards possible future scenarios and goals for the work environment. Fourthly, we asked for different options and alternative strategies or courses of action. Finally, we tried to identify what actions were needed, testing our plan for further process design. As individual face-to-face conversation, this was the first setting designed to get everyone’s full story, giving us the opportunity to test and reflect back possible interpretations of the conflict dynamic, as well as to openly elaborate the possibilities for future handling. Together with participatory observations on the offshore installation, and further meetings with the leader and union officials, it laid the foundation for the basic trust

⁶³ As generically found in the handbooks of “Coaching” techniques (e.g. Whithmore 2002), which typically go through the steps of identifying main goals; checking them against the reality of the situation; structuring options and strategies; and defining and dividing them into small and large action steps to be made.

and knowledge necessary to get acceptance for more collective-oriented development conferences. The interviews were also systematized into a report which was given to all participants. This report provided an overview of the different perspectives we had gained insight into, and represented our first opportunity to feed back more theoretical understandings of conflicts.

The *third* main activity took the shape of two conferences involving all participants. The first conference focused first and foremost on the understanding of conflicts, relating their experiences to their main conceptualizations. In addition to the factors those highlighted in the analysis, the emphasis was also on experiences of individual consequences leading to sick-leave, isolation and depressive states. After a welcoming session arranged by the ones perceived as the main actors, the conference started with an introduction of the main analytical points, with the intention of bringing in some new tools for understanding the conflict. These were further used as foundations for group work and plenary sessions where the conflict dynamics were discussed and translated into their context. As such, the basic elements from the analysis were used as constitutive concepts in the handling process. The groups were generally put together as a heterogeneous mixture of individuals across the established conflict lines; and generally speaking, the group work confirmed, recognized and gave support for the analysis introduced. Further group work focused on selections of which elements would be more easily left behind, and which ones needed further and future attention; and on attempts to create agreement on what constituted the basic disagreements, as well as on how this disagreement could be mastered. The last part of the conference, the second day, proceeded with the plenary sharing of stories and results of the discussions from the first day; followed by a session establishing a common set “rules of the game”, and how to make them effective in the future. Finally, the last part of the conference was devoted to concrete future practicalities and tasks; a commitment session for future actions; as well as action plans and responsibilities. In sum, the product of the first conference was primarily a re-working and “closing” of the conflict experiences and the “locked” mental models through the use of constitutive concepts, where the ways of working with the problems during the conference contributed towards a more widespread understanding of their collective future handling. During the conference we experienced a strong mobilization amongst the participants to contribute towards

re-working and getting away from the conflict-driven environment. The participants were eager to understand the “others” positions, the different experiences of the situations were taken seriously, and the participants’ willingness to both listen more actively as well as put things behind them characterized the general discussions.

The second conference was arranged six months later and focused particularly on input in the shape of experiences made in the meantime, as well on the organizational preparations for the oncoming organizational change process. During these six months the project group had established a pattern of frequent contact with leaders, union officials, as well as some of “core members” involved, and they were able to report a general shift in atmosphere and a more constructive work environment. Based on such input the second conference was co- and re-designed into a starting point for future organizational development rather than conflict handling. The first part of the conference was dedicated to identifying the characteristics of positive work environments, focusing on responsibility and contribution to a supportive milieu, and on how to make sure small problems are not captured and blown out of proportion through the negative dynamic of conflicts. Here the logic was the same as for the first conference, namely to bring in a conceptual apparatus – constitutive concepts - to be used in further analyses. Furthermore, on the basis of the previous experiences and analysis, further work was done in relation to the formal roles, and their holders were involved in creating a more robust and formal system for conflict handling. They thus established an agreement and a system which highlighted cooperation and common effort between the roles, in addition to their existing division of responsibility. To re-work and move further away from the history of “blamestorming” and negative focus of the past, a session of collective history-writing emphasized the organization’s past achievements, and created a “history-line” where important progress marked the main points. Even though the one-dimensional picture of conflict had dominated and overshadowed the perspective for some time, it was highly possible to create a parallel story of rather great achievements of both a human and a technological nature during the last few years (Personally, I also found it rewarding at the time to widen the conflict perspective by for example pointing toward the role of this particular offshore installation for onshore economics. As part of a group of three production platforms working at this particular oil-reservoir, it had contributed with one thousand billion

NOK (approximately 150 billion dollars) to the Norwegian government's budget over a period of 20 years). The second day was primarily devoted to the start-up of the mentioned overall change process in the company, which was then about to be implemented. As described in the introduction, it represented a rather radical shift in the offshore tradition, and for years to come, it was going to be considered the "new big issue" in the company. These processes also represented a shift of attention and a further step away from the handling of a conflict toward dealing with challenging changes for the future. For this part of the organization, it laid the basis for starting to translate the principles, frames and understandings of more cross-functional teams into the local setting. And for the process of conflict-handling the timing was good, as it forced the organization into a necessary shift in focus towards future processes.

In sum, the key observations led to some key analyses that pointed toward general areas of improvement and toward the need for broader participation and organizational processes. Addressing this need involved using a series of interviews, meetings, seminars and conferences to feed back the analysis, and to use it both for descriptive and constitutive concepts, and for models for reframing the understanding and handling of the conflict. This meant to introduce analytical concepts not already existing in the organization, and to (co-) create more systematic (self-) reflexive processes to be used on the situation today, as well as on its history and its future handling. In sum, it represented a mental shift from an individualized understanding of the situation to one characterized by more collective responsibility, and from apportioning blame in relation to elements in its history to focusing on organizational development for the future.

In order not to create a false ambition, or to make this analysis of interventions seem like a final documentation of effects, it may be worth summing it up with some considerations in relation to the likelihood of lasting effects ensuing from the project: In this kind of projects it is difficult to conduct exact analyses or assessment of what actions or interventions cause what effects; or to what degree the effects are sustained over time; or to sort or separate the effects of different interventions and processes from their causes. For this case, no clear follow-up studies were made or asked for, although we have had input from many sources about the state of affairs over the six years that have passed. This input has reached us through our work with

the overall organizational change process in the system; through occasional meetings with representatives from this particular part of the organization; through later discussions with the local union representatives; and through the participation of leaders in the integrated leadership training programs discussed later. These sources of input have given us the distinct impression that the general work environment of this part of the organization had improved to such an extent that the definition of conflict was no longer suitable, allowing other challenges to take the attention away from the destructive cycles of conflict dynamics. And in terms of normal processes of knowledge production treated as experiential learning in a complex setting, the real lessons of the case have to be established within realms other than exact measures of effect. Even simple factor analytical considerations would show the difficulties of estimating the long-term effects of organizational interventions; and as argued in the theoretical discussion, the validity of the intervention has to be judged by other means. Some of this is exemplified through the reasoning and analytical steps above, whereas other considerations transcend these steps and might be of more generic nature:

Experiential Consequences for the Large System Research Process:

As introduced in the method part, the applied approach of experiential knowledge production has the ambition not only of relating to each separate project, but also to the iterative relation amongst them. And to illuminate the research question, the key iterative consequences particularly focus on how it contributes to a shift from a “pure” organizational focus and toward an integration of leadership development, as well as attempts to institutionalize interventions. To do this, the key discussion here revolves around the question of what kind of effects this first project had for the participation in and development of further projects, and consequently for the development of the research question. These experiential consequences are discussed through four interconnected but different topics: *First*, through some reflections on how the first project affected the access to and participation in further projects; *second*, through some reflections on how it further affected the understanding of interventional methods, and particularly the role of the researcher; *third*, through discussion of some consequences for the more substantial understanding of organizational topics,

particularly the role of individuals in organizations; and *fourth*, through some initial reflections on non-human actors, particularly the consequences of technological development as observed in retrospect.

Consequences for Further Projects and Positioning in the System:

When writing about intervention methods, or about iterative project development, it is tempting to focus solely on the mere generic, professional and abstract elements that contribute to the design of interventions. This can for example be done through highlighting general design principles for a series of seminars and meetings, identifying interviewing techniques, systematization and categorization of substantial data and so on. But as anyone who has participated in practical developmental projects will know, the conditions are never ideal, and there exist a number of other factors of great importance for the progress. Often, these are factors that lack an expression in professional terms, and sometimes they are factors of a rather tacit nature in terms of academic texts. Such factors can be found in a range of factors including the effects of the personal social and persuasive skills of a project member; the mere coincidental acquaintance of central actors from previous projects, professional networks, or even private settings; and sometimes it can simply consist of having the luck to be in the right place at the right time (for instance through being stuck at an airport together with a chief executive due to cancelled flights – which provided an initiating context for another project in the same system). The point here is that the un-linear and messy complexity of real world projects is also formed by factors out of hand, as well as by sets of purely coincidental factors.⁶⁴ For example, the conflict-handling project was in itself a result of connections made by one of the senior researchers (Thoralf Quale) involved in a long-term trail of projects that goes back almost all the way to the first founding of this system. One of those who made the initial contact and enquiry had met him in an earlier setting, and thus learned that the WRI was also involved in, and had a track record of, conflict-handling projects.

⁶⁴ This messiness leaves no other option than to take the complexity into account in relation to the intervention. Thus, the interventional strategy has to include a logic where one increases the likelihood of interventional effects in a complex setting through the development of a network of projects that are loosely connected but work within the same overall direction, and by positioning the projects so that the closing of one project does not necessarily affect the others. This overall strategy of operating with a network of parallel projects, rather than with a series of successive ones, is further discussed as large system change requirements in part 5.3.

The conflict-handling project was, as described, gradually turned into a process of organizational development. This happened both as a result of the analysis we made, and as a result of the overall process and the organizational development efforts ruling the company at the time (as described in the introduction and theoretical part). Moreover, an important factor was also the senior researcher's involvement in the initiation of these overall change processes, both through his participation in a project group mapping international best practices and existing research in the field, and through his conceptual feeding and his long-term experience from both participation-based change processes and organizational models based on cross-functional and autonomous work forms. His track record, particularly from these projects, as well as his involvement in conflict management, is what led to the first actual contact made for the initiation of the next project analysed (Part 4.2).

Concretely, some of the leaders involved met at a yearly forum for all the offshore platform leaders, and this led to a new initiative by the group of leaders in that particular unit. So the initial experience made is that one's track record and reputation from previous projects, if these are perceived useful, lead to a gradual increase in position and influence, which again increases the likelihood of further advancement. In addition, and particularly before this track record is eventually built, one of the main lessons learned is that in the initial situation of competing with the large group of consultancy firms dealing with organizational development, one has to be able to present the approach with conceptual clarity; but even more importantly, in order to be a preferred partner, one cannot turn down any offerings of working on projects in the critical early phase. The next sections deal with two selected key areas for more direct interventional knowledge production which were strengthened through the conflict management project:

Project Consequences for Experiences of Interventions and the Role of the Researcher:

The analysis designed for handling the conflict, and particularly the integration of analysis and interventions, touches upon several practical aspects of interventions. These include the role of language when developing and co-constructing new (constitutive) concepts in interventions; how balanced process interventions can be used for the purpose of participation-based change; as well as considerations

relating to the role of the researcher in participation-based projects. Both the role of language and the logic of “balanced” processes are further dealt with in the analyses of parts 4.2 and 4.4, and here the role of the researcher is, for several reasons, particularly emphasized in relation to the case of conflict handling.

In part 2 the distinction between *constitutive and descriptive or reductive* concepts is introduced to illustrate that knowledge production always already deals with both the empirical revelation, as well as with the constructive production, of knowledge – through the use of language. Just as this is the case for knowledge on leadership, I will argue that this analysis provides a pragmatically well illustrated example that it also applies to conflict handling. As discussed above, part of the definition of a conflict of this type is its production of deadlocked social processes and the dynamics of organizational “lock-ins”. The observed “impossibility” of staying neutral in such environments, together with the dynamics of conflict lock-ins, seemed to have a destructive impact on the ability for direct internal handling and mastering of the situations. The dynamic of the internal discourses, structures, and formal roles seemed to produce more of the same, and had to be challenged by something that was not already represented in the system. This something was for this case for example a conceptual apparatus of basics from conflict dynamics – such as attribution theory and theories about censoring universes – that was not already explicitly represented in the discourse. And even though it represented nothing more than a mere empirical observation and interpretation of the conflict, it also interacted highly with the internal discourses. It changed the co-reflections of the situation, formed part of the self-understanding, and probably helped break some of the repetitive and destructive structures of the conflict. As such, the observations and their analysis worked together as both *descriptive* and *constitutive* concepts, and the pragmatic and interventional effect of these was to contribute to a shift in the internal discourses and handling ability.

As for the role of the researcher it is therefore reasonable to argue that we can draw two important conclusion from the dynamic of conflicts, and both of these also have consequences for the understanding of the further projects dealing with organizational change: First, that a precondition for applying interventions of broad participation in development processes sometimes paradoxically involves bringing in

other perspectives than those directly derived from the participants. When the relational “lock-ins” contribute to participation-based analysis of the situation that can be said to be part of the conflict itself, for example attributions and constructions of scapegoats, a strictly direct participatory process would have difficulties transcending the interpretational horizon of such “lock-ins”. In this case, there is reason to believe that the external analysis – the *constitutive concepts* – that helped break the conflict dynamics would not have arisen from the participants heavily involved in the conflict. In conflict situations there is always a risk of creating exaggerated moods of aggression directed at individuals, a factor which is detrimental to the possibility of collective responsibility. Translated into other often highly emotional settings, such as large-scale organizational change processes, this can give insight into the role of the action-oriented researcher, and help us see the possible democratic nuances and sometimes paradoxes of broad participation.⁶⁵

Secondly, and in line with this reasoning, one can learn that the existing formulations of a developmental project often has to be reformulated and re-contracted based on experiences and knowledge acquired about the social processes in play. It always sounds authoritarian, and not very participation-oriented, to state that the project employer makes suggestions based on false premises and does not know what is actually needed. But for conflicts, as well as other cases where heavy emotions are at stake, this can be highly true. After all, in the tradition of action-oriented research one can be led to believe that the participants are always the experts of their own local situations; but conflicts seem to be particularly useful for creating nuances in this notion. The point here simply illustrates that sometimes something else and “from the outside” is necessary to bring about more participation and to overcome the risk of becoming or remaining prisoners of the internal dynamics. Therefore, knowing when and how to re-contract an assignment, how and when broad participation is not enough, as well as how and when to re-contract the role of the researcher, seems to be an important part of the interventional learning of action-oriented projects like this one.

⁶⁵ Other nuances of participation are treated in the thought-provoking book *Participation: A New Tyranny?* (Cook & Kothari, 2001), where the basic rationale is that participatory development can only be taken seriously through acceptance of the possibility that it should not be saved as a mantra for development. In analogue to the case above, it deals with theories of social psychology – e.g. group dynamics and pressure – and discusses some basic considerations of participatory limitations.

Non-human actors...

As a relevant digression to illustrate the bigger picture and the contextual forces, it also belongs to the story that the particular reservoirs of oil located in this field are today considered as being all but depleted; meaning that the production is in its last phase, the “tail phase”, where the expenditures of exploitation are approaching and will eventually cross the income (thus figuratively creating a “tail” in the modelled graph). Applying the term of “non-human actors”, the situation helps understand that this kind of organizational interventions is not only about the dialogues and discourses of the people living in conflicts; it is also highly affected by other actors, and in this case the non-human actors of technology. Here, this relates particularly to innovations created to increase the exploitation of reservoirs or help in the identification of new sources, as well as to the related shifts in organizational forms and structures. And to add complexity, operations that only a few years ago seemed uneconomical, , are today profitably actualized due to international factors affecting oil prices and energy consumption. All of these partly external conditions are of course not actors that can be directly acted upon, but they represent heavy material forces that form the situations and have considerable impact on the kind of choices made. Consequently, the interventions cannot simply be related to the aim of creating a participation-based solution of the conflict, or simply be treated as a matter of creating an organizational development or change process, if for example, as was the case here, the complete production unit is going through qualitative shifts of production: The production units of this particular field have since then been merged, reorganized, technologically modernized, and heavily rationalized in terms of the personnel needed; and some of the production has even been transferred to unmanned sub-sea production elements. These overall changes contribute to the picture discussed later, a picture of an ever changing large scale system where powerful variables of organizational, technological, political, economic, and even global importance, continuously transform the focus of action and attention. As an experiential consequence, this first glimpse into the large system – related to the heavy forces of “material actors” – later created a growing interest for probing more deeply into the possibilities of incorporating a receptive and translating apparatus that would also take some of these forces into account when dealing with organizational

development efforts. These relations are further discussed in the analysis of project four, and constitute part of the rationale for the Reflexive Machinery.

To sum up this project, the iterative and experiential consequences of the project with relevance for the overall topic consist of both strategic positioning over time as well as of more tacit social processes of personal connections and coincidental episodes. Even though the project had a major importance – particularly for my personal building of experience, as it was the first project in the system – it was not the “butterfly that initiated a storm”, but an important part of an overall project portfolio. The main point in this text is the iterative and cyclical building of relevance for interventions, and it particularly led to some considerations that helped make the role of the researcher clearer; while also highlighting some more generic elements of the relation between individuals and organizations, the application of “outsider” analysis, the understanding of organizational dynamics, and in the end, some elements showing the importance of non-human actors. All of these factors contributed towards the handling and the design of the next projects, in which some of the topics are picked up and elaborated on, particularly in the shape of generic aspects from one of the many offshore units involved in the overall goal of becoming the “Best Operator in the Industry” through the organizational means of cross-functional and autonomous teams. And as we will see, this large system change process was also no example of a straight-forward or quick-fix process.

4.2 Project Two: A Shift in Organizational Model

Directly after the conflict project the project group was invited to conduct a “Consequence Analysis” on the preparations to shift the organizational model in one of the offshore production units. The planned shift was in accordance with the plans for an overall change process in the system, which in the beginning was to be initiated within the local production units. This particular project represented one of the first production units to take the initiative to implement the overall change of organizing principles, and to introduce an organization model of cross-functional and autonomous teams. The assignment to conduct a consequence analysis of a shift in organizational model is not necessarily an “intervention of choice” from the researcher’s perspective, but it is part of a regime of requirements imposed by the Norwegian Petroleum Directorate. The consequence analysis (Fossen et.al 2000) is formulated to ensure that technological and organizational changes do not have negative consequences of relevance for security, work environment, and personnel involved. Its main logic, to calculate the consequences in advance of the process, is mainly derived from the field of technological change and rebuilding, but as an instrument it is also a formal requirement for organizational change processes.

At first, the project involved attending a large number of meetings with an internal project group assigned to do all the planning and the preparations for change, and establishing cooperation with this group. Through this first round of preparation meetings, we established an understanding of the perspectives they had applied, and the language used, and we were able to form a complete picture of the planned activities designed to implement the change. Through these conversations and through access to the formal documents involved, we also obtained the more specific picture and detailed models of almost all the areas affected by the change. These initial observations further gave us an impression of a planning process where the process itself had become irrelevant to the planning. In short, a process where the model was detailed; but where the steps of the process, or the principles for its design, and dimensions such as participation and involvement almost completely

lacked a functional language. Interviews with central and representative stakeholders confirmed this picture. Consequently, our main activities were initially centred on feedback related to this observation, and on seeking to contribute with a conceptualization of the dilemma as part of our “consequence analysis”. This in its turn established a relation where we were eventually also involved in the design and implementation of training seminars for teams of operators as well as leaders in two main phases. As a preparation for the first steps into the new organizational principles – and after a two year period, and an evaluation process – training activities designed to deal with the challenges were identified.

Selection Criteria

After an outline of its relation to the methodological criteria of selection, the overall elaboration of this project follows the same cyclical structure, and is *first* about some key observations made of what kind of language and rationality existed in the organization; *second*, it deals with analysis of the bipolar logic of implementation versus participation; *third*, it deals with the design of interventions which are in congruence with the principles of the organizational goal; and *fourth*, it deals with the interventional actions taken, and the relation to some concepts rooted in the tradition of socio-technical system theory applied as *constitutive* for the analysis.

1. **Relevance:** Like the previous one, this project too is applied in order to indirectly deal with the research question, illustrating some of its main background elements. Even so, integrative elements of leadership development and organizational development connect to the key actions this project. The connections and paradoxes between developmental processes versus shifts in organizational models are particularly highlighted in this part. The theoretical part concludes with an increased awareness of language as part of the solution to transcend some of the epistemological considerations of knowledge production on leadership and organizations. Some of the same logic is tested and applied as part of the analysis here, to better understand, and to start building a conceptualization, of the paradoxical differences of organizational models and developmental processes. Consequently, the

approach of working with “language development” as an interventional means as well as a means to build knowledge on organizational development is further developed in this analysis, and creates a project-based background for the integration of leadership development and organizational development through a focus on language development.

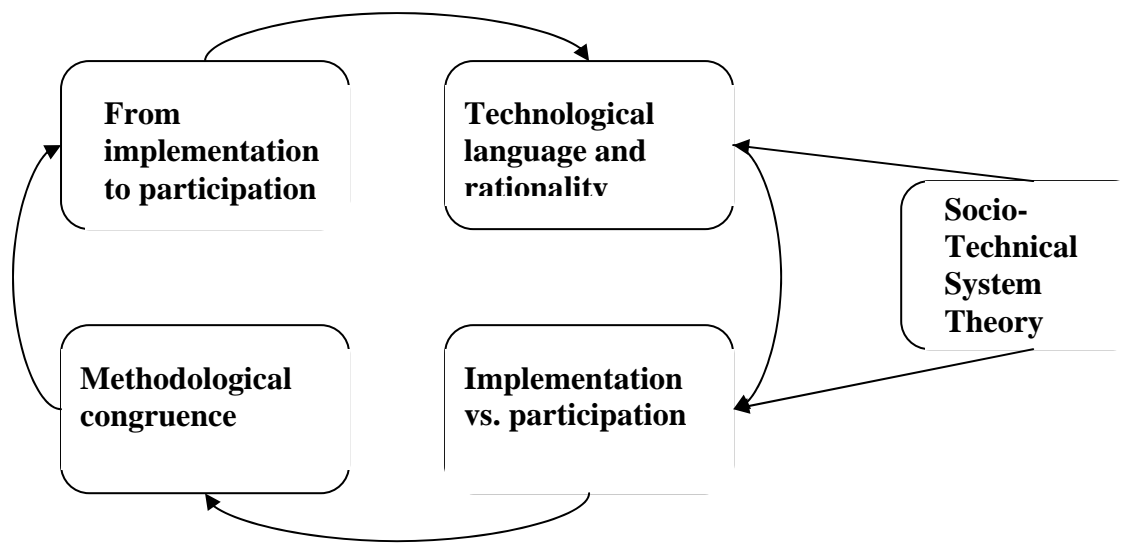
2. **Validity:** Almost needless to state for the experienced researcher, change processes, and particularly those relating to how to treat the effects of metaphors for organizational models, or organizational drawings and charts, seem to be at the core of all organizational change. The relation between the “fixed” model and the processes of change, seems to be an ever-returning issue in development processes. And if this understanding can be applied as part of the interventional logic and design, the applicability of this analysis should be valid as actionable knowledge to other organizational processes as well.
3. **Usefulness:** Bringing established concepts from “socio-technical systems theory” into the analysis made in the project directly contributed to the actions taken to organize the further change process. This was particularly done by applying concepts such as “methodological congruence” and “minimum critical specifications” as constitutive concepts for the participants’ analyses of their own situation. Applying such concepts and language in the analyses made it possible to contribute to a shift in perspective, going from a perspective where organizations are treated as fixed entities of an almost physical nature, to a perspective of designing social processes.
4. **Cyclic development:** This project raised issues of importance that were dealt with as a continuation of the conflict handling project, such as the role of the researcher and the use of language-based interventions. And it was for my part the first project which explicitly combined and integrated both leadership development and organizational development into the change efforts. The project efforts played an important role in bringing the particular production unit to the forefront of units dealing with the overall change ambitions, and it brought the group of researchers closer to more centralized processes, as well

as closer to a position where it was possible to apply the experiences and develop an integrated leadership development program. As one of the early attempts in introducing the overall ambition of change, it also raised the questions of diffusion of change in large system change practices, and of how to eventually deal with “regression” effects and pressure produced by other parts of the system.

5. **Academic contribution:** The debate on “theory-in-use” and the differences between “what is said” and “what is done” is an ever returning debate within organizational change research. It has its relations in the academic discourse on theory versus practice, and just as the challenge of integrating theory and practice will continue to inform this debate, the challenge of putting theoretical models into practice (implementation) will do the same. The analysis here relates directly to this debate and its connection to analysis and interventions of and through “language in use”.

6. **Personal interest:** For me personally, this was the second project where I experienced in practice the forces of redefining concepts and creating interventions by analytical feedback for change processes, and as such it stands out as a crucial experience for building confidence in the practical role of theoretical insights. This experience further fostered an interest in the connection between language and reality, and the term “constitutive concepts” developed into more than a theoretical contribution to the discourse on social constructions: It also transformed into a concept for practical knowledge production and intervention. And consequently, the experience of contributing to social processes through interventions touches upon the deeper feelings of influence, recognition, and power; it creates a taste for more, and boosts the private reflection cycles on effective interventions:

”A Shift in Organizational Model”



The models show the key labels assigned to each analytical step, and same as for the previous project, these labels of observations, analyses, improvement, and actions serve as the main structure for the examination of the experiences.

Project #2	Key Observations	Key Analysis	Key Improvements	Key Actions	Experiential Consequences
<p>Shift in Organizational Model:</p> <p>This project represents one of the first comprehensive projects where the ambition was to contribute to a complete shift in organizational model, and implement the overall organizational principles identified in the mentioned BOI process (Best Operator of the Industry). In short, it meant transforming a hierarchical offshore organization into one applying the main principles of cross-functional and autonomous teams.</p>	<p>Technological Language and Rationality:</p> <p>The language and rationality in use contained metaphors and concepts normally applied and established through the main professional knowledge and linked to technological issues. This took the shape for example of a belief in empirically testing and calculating the organizational effects in advance; predictions and the planning of details for implementation; and of deficient language for participation.</p>	<p>Implementation vs. Participation:</p> <p>As the effect of an organizational model is partly dependent on the design of the change process, and in particular on the dimension of participation and involvement, a functional rationality of social processes is necessary. Participation and involvement naturally means something else for human systems than for technological systems, and understanding and handling motivation and resistance requires the use of another language.</p>	<p>Methodological Congruence:</p> <p>If the goal is to create an organizational end phase or state which is driven by high levels of autonomy and participation, there is reason to argue that the process toward this goal has to be designed by the same principles. Methodological congruence refers to such principles and accordance between process and goal. Just like the futility of attempts to “bomb a nation into democracy”, one can not create a purely top-down process for increased participation and autonomy.</p>	<p>From Model Implementation to Participation:</p> <p>With relation to the key analysis and improvement issues, the process was designed accordingly, i.e. through a combination of reflecting back the analysis made and a high degree of involvement from those affected, as well as through tailor-made leadership development activities.</p>	<p>The Role of Language:</p> <p>Our tendency to see organizational development also as components of language development grew stronger through this project. The experienced effects of interventions in the language in use – for instance the different aspects of a language tuned to working in social processes of participation vs. in the more technological processes of implementation; the necessity of both; and the design of activities capable of making translations – all contributed towards the increased focus on language as a direct source for identifying and intervening in the dominant rationality.</p>

Key Observations: Technological Language and Rationality

Both the initial mandate of the project and the initial interviews with central actors in the organization made it clear that they understood the consequences of changes to the organizational model as something that could be identified and calculated in advance, as if it was to be conceived in the same way as technological changes. As *exemplified* by what I place as a prototypical statement below, the observed

conceptualization of organizational change seemed to be highly influenced by the conceptualization of technological change. The language applied suggested that the organizational changes could be tested in advance, their effects calculated, and their implementation planned in detail, as if the organization constituted a “thing”. The typical conversations and established actions we observed during the early investigations were connected to the project group responsible for the preparation and planning of solutions, the calculation of effects and analysis of consequences, the use of pilots and experiences from other projects; in short, in a general preparation for the implementation of a new and team-based organizational model, as if this was a new technical device to be implemented. The following represents a typical statement from the early phase, and the gist of its contents was reflected in the written reports as well as in conversations with both leaders and operators:

“We have followed the book. The project group has drawn the new model in detail, described the new leadership role and interfaces of responsibility, the additional team functions, the new roles for the operators, the areas of responsibility and authority of the teams, and detailed everything from meeting structures to information strategy. We continuously collect input from other pilot projects in other part of the organization. We have also created a timeline for implementation of each part and who is responsible”.

In general, the picture of “what to do” and “who should do it” was described in great detail in documents – and in theory – but suggestions for “how to do it” were all but absent in these early observations. In other words, the *structure and the models* were drawn up, but the developmental and social *processes* were absent from the plans. The emphasis and efforts seemed to be directed primarily toward what is normally the point of departure in technological modifications and changes.

In organizational change and development processes, part of the potential for organizational gains normally lies in better coordination between human recourses. And the rationale of turning the organization into one that was structured more by cross-functional teams was built particularly on an idea of better coordination amongst operators. Basically, the ruling rationale was to reduce indirect coordination

through hierarchy and levels of leaders and to increase direct coordination between operators necessary to solve a task, or keep a process running. In short, these are principles based on a simple socio-technical analysis of handling variations in production processes. And when the challenge is to create better coordination of human actions, the big issue for change processes is whether they are designed in a way that creates, on the one hand, resistance, fortification, rigidity, and passivity; or, on the other, development, learning, creativity, and pro-activity. The general experience is that lack of proper participation in the process leads to the more negative characteristics (Holter, et al. 1998). These are all social dimensions of importance for social interaction, but which are not normally important for technological change processes. For example, if the task is to modify technological equipment on an offshore production plant, or to change a turbine, the organization does not need to take into consideration the turbine's motivations, its experiences of involvement and ownership, whether it becomes defensive and passive, whether it stops learning and creating knowledge, or whether it "calls in sick". In other words, when the rationality, logic and language of technology-oriented projects dominate organizational change and its social processes, we can observe that a lot of essential elements are lost in the translation. The observed result in this project was that the translation process was absent in the beginning, general resistance and scepticism directed toward the change was widespread, and what was said – or written – rarely or seldom illustrated what was done – or acted upon; even though it was said and written and detailed by a project group which formally represented both unions and leaders, and which had applied the organization's "methodology for project groups and organizational change" to its full extent.

From what constitutes one of many observed and prototypical statements and formulations (such as the one quoted above), I will pick some typical terms and highlight three elements for the further analysis of the applied language: The *detailing* of plans in advance, the use of *pilot* projects, as well as the conceptualization of a change process in terms of organizational *implementation*. If we look behind the language and rationality of these three statements we can argue that the rationality itself constitutes part of an organizational development challenge.

Key Analysis: Implementation versus Participation

Detailing new organizational solutions in advance can be beneficial and desirable if one is going to make a decision affecting a lot of people, whether one is the formally responsible leader, a union representative, or for that matter any other stakeholder affected by a change. Knowing in detail what is going to be the future state secures the decision and its eventual support. Psychologically, it is also well documented that future predictability is one of the main dimensions reducing human stress and contributing towards general well being (E.g Seligman, 1992). Detailed pictures of organizational plans for the future can therefore *seemingly* cover the needs of all parties involved in a change process. In an environment dominated by expertise on (small and large) technological projects, where predictable detailing and rather exact future estimates are the norm, the logic behind and the tendency to make detailed plans are naturally fortified.

On the other hand, if the plans are detailed and fixed in advance, it normally means that the scope for involvement, participation, local adjustments, and possibilities for ownership of the process is weakened. And lack of involvement, participation and ownership are the general mechanisms that produce resistance to change, with the particular result of employees not supporting the process, and consequently failed efforts in terms of achieving the wanted results. *And consequently, there is a basic paradox between the desire and need to specify organizational effects in advance, and the need to produce a change process open for and dominated by participation by those affected.*

It thus follows that creating a detailed picture of the new organizational model in advance, calculating its effects, and analysing its consequences, normally means creating a picture that is theoretically sound, but invalid in practical terms. It means creating a fixed picture of effects that are of a relational kind – as if motivation to create better coordination and cooperation between employees could be calculated or approved in advance. The importance of participation in processes for the resulting effects simply means that the result and effect are determined just as much, or

perhaps even more, by the design of the process as by the design of the model itself. A simple equation can be used to illustrate this relation⁶⁶:

Organizational Model + Design of Change Process = Organizational Effects

And since the design of the change process is about involvement and accordingly adjustments to the process and the model, the organizational effects of social processes is hard to estimate in advance, and particularly in detail. In addition, and based on my (limited) experiences from the time spent working within this large system, the cost involved in the change process is often underestimated. Creating, for example, better coordination in a team-based organization demands large resources for training and raising the competence of leaders and employees; new arenas for interconnection and coordination; resources for the establishment of new teams and networks, and so on; and in most cases, there is loss of productivity during the process period. Thus, the estimated gain of a change of model is lost both due to and in spite of a detailed and thorough analysis of the model created in advance. In other words, the language in use, or the technological rationality applied, becomes part of the challenge of the process, and has to be dealt with.

It is rather easy to document in project reports what a well-functioning team is, and how it should ideally work, just as it is equally difficult to actually realize the ideal in the practical setting. In theory, it is rather common to try to decompose a team into its constituent parts, treat it as a thing, and test its durability and productivity in empirical experiments.⁶⁷ Accordingly, the research on teams have a tendency to tautologically show that well established cross-functional teams are more productive, that they generate well-being, create more learning, are more innovative, and so on.⁶⁸ Reading this literature the point seems to be “proven” to a degree that makes it more than tempting to decide to implement an organizational model based on well-functioning teams. In practical settings however, there are good teams and bad teams, and good

⁶⁶ The equation itself, as well as the difficulties of applying “pilots” seeing the term “implementation” as a merely physical term was first brought into the discussion by the project manager (Øystein Fossen).

⁶⁷ Typically an approach seen in the branch of more positivistic oriented paradigms, as argued for amongst many others Donaldson (1996a, 1996b), where the testing of independent and decomposed variables is part of the ambition of valid knowledge production.

⁶⁸ A search on Google Scholar for the terms “Productive Teams” lists no less than 72 000 hits, and a scan through these show that a great proportion of these are for research presenting the beneficial dimension of teams.

teams have to be organized, coached, and developed through experiences of phases; through struggles and understandings of power and professional identity; through systematic learning of communication- and decision-making processes, through regulations of influence and responsibility; through the creation of functional roles; through natural task dependencies; through systematic and balanced feedback systems; and through conflict mastering and handling, to mention a few development and process dimensions. In short, what was treated as an organizational model to be implemented through the rationality and language of technology is also a relational and continuous participation process that has to be systematically designed.

Secondly, in an analogue way, the ideas of collecting input from *pilot* projects (as in the statement introduced above), and of applying models from other parts of the organization, connote a technological rationality. In this case, this rationality seemed to represent widespread beliefs that positive experiences with cross-functional teams in one place almost automatically lays the foundations for organizational diffusion to other places or departments – Or simply that success in one place leads to diffusion in the system as a whole. The basic rationale underlying this belief was that a model could be tested in one part of the organization and its effects measured, and based upon the results of this testing, decisions could be made as to whether it should be implemented in other areas. Using positive pilot experiences as a foundation for further diffusion is the norm for implementation of new technology. If the pilot project is successful it can normally be well documented according to dimensions such as productivity; adjustments and adaptations; needs in terms of maintenance; user interaction and friendliness, and so on, and the technology can be implemented as a model for other areas. Since positive experiences with new technology can be copied and installed in a relatively straightforward manner, it seems that these kinds of experiences help form the technological rationality, which in turn dominates as a ruling rationality for and understanding of organizational processes. It can be logically and rationally seductive to think that if a team model works well in one area, it should also be implemented in another. Nonetheless, just as the diffusion of cross-functional team-based models did not happen as expected in the Norwegian collaboration experiments in the sixties (see part two), this also did not happen for this large system. Except on the level of ideology and rumours, the practice of cross-functional and autonomous teams did not manifest itself elsewhere; and to some extent,

experienced success in one place was also part of the resistance to change in other areas, with the arguments particularly pointing at differences in culture, history, physical lay-out, life span and so on. And again, I will argue that the basic reason and analysis is that good organizational solutions are a result of well designed organizational processes; whereas in attempts to create diffusion and to copy organizational solutions the model is often highlighted, while the hard work – the process – is less visible. For example, the main pilot projects in this case were a result of long-term training of both operators and leaders, the handling of phases with massive resistance, as well as extensive and long-term use of participation based organizational development activities. Due to this comprehensive process the pilot projects of cross-functional and team-based organization created learning, as well as ownership and maturation in the local setting. From such examples one can argue that if anything is to be learned from well functioning organizational pilot projects in large systems, this is found among elements of the practical design of the process to get there, rather than in the (theoretical) descriptions of the organizational model.

And thirdly, the term *implementation* further underlines the logic and rationality from technology oriented projects. The metaphor “implementation” allures attention towards a logic where organizational models are seemingly something that can be surgically operated and installed into the organization – like an implant – to create better organizational curves. It may be seductive and effective as a metaphor to see organizations as biological systems, but it is at the same time far from being practically effective. One may argue that it is pragmatically effective to implement new technology, but creation of local ownership and motivation can't be implemented, no more than they can be resolved; thus, the processual efforts behind well functioning organizational change seem to require a different language and logic.

At first glance the statement cited above seems to be both rational and logical, but if one looks beneath the surface and identifies some of its underlying presumptions, and “de-constructs” it in terms of social processes, it can be argued that the language that is used is derived from the everyday language within a technologically oriented rationality. Furthermore, the rationality leads to the creation of actions based on the well-known logic of models, pilots, and implementation, which constitutes a logic too

technical to be suited for organizational change of this kind. As illustrated in the selected examples above, a well functioning and discipline based language in one professional area is not always transferable to another – in this case to a language and rationality of social and relational development.

Key Improvements: Methodological Congruence

It naturally follows from this analysis that while working with organizational change and particularly with team-based development, some of the scope for improvement is connected to the translation between a technology-oriented rationality, and a more socially and process-oriented one. The language and concepts applied have an impact on the process, and I will here particularly highlight two concepts borrowed from the language of Socio-Technical Systems theory, namely the concept of *Methodological Congruence*, and the concept of *Minimum Critical Specifications (MCS)* (e.g. *Herbst, 1976, 1985*).

Methodological Congruence in this case simply refers to a logical consistency between the means and the ends of an organizational change process. For this case, where the explicit goal was to create an organizational end state based on principles of cross-functional and autonomous teams, and hence an organization highly based on direct participation, in order to be congruent, the change process had to be designed according to the same principles. The simple logic is aligned with the impossibility and methodological incongruence of bombing nations into democracy, or of designing and implementing a simple hierarchical and top-down process, when the goal is to create motivation for responsibility and participation. As the key analysis points out, the conceptualization of a technology-dominant rationality was highly tuned towards handling technological development; nonetheless, much of the same rationality was applied in the attempts to create organizational change. And central elements in our approach were, as described, to feed back to the organization that the consequences of a model lies just as much in how the change process is organized as in how the model is designed; and to form co-reflections on the alternative rationality and language of social processes; as well as to present some concepts and guiding principles for the process. One such guiding principle was the

concept of *methodological congruence*, and we sought to demonstrate how this principle can be applied to help design the process toward a more participation and team-based organization: When the ambition is to create an organization distinguished by more responsibility and participation by the operators and front line personnel, the process toward these principles has to be designed based on similar principles. Hence, the process had to be broader and to more systematically ensure the involvement and development of those inhabiting the cross-functional and autonomous teams.

A second example of such a language and conceptual contribution was to create a division between two partly paradoxical needs, namely the need for steering, control and securing the predictability of the process – what we named *analytical rationality*; and at the same time the need for openness, involvement, adaptation, and participation to secure a well functioning result – what we named *accomplishment rationality*⁶⁹. Analytical rationality, then, refers to the need of all parties to have a minimum of analysis predicting how the change is going to take place and what will be its consequences for dimensions such as efficiency, work environment, knowledge production and so on. For the responsible leaders the need for these analyses are rather obvious and simply refers to the need for some kind of reliable background material which shows that the exercise is worth the risk and effort involved in it. To initiate large change processes is at the same time to put your head on the block, and naturally one searches for as much and as detailed predictability as possible. And for both operators and the rest of the organization, the willingness to invest and involve oneself in the change process is naturally connected to the belief one may or may not have in a positive result. This search for security through detailed predictability for both leaders and operators might help us understand why the search for a theoretical and detailed model in advance of the implementation of the changes got as much attention as it did here - and probably also does so in general. The accomplishment rationality, on the other hand, refers to the pragmatic rationality of ensuring productive and well-functioning results from social processes. Normally, securing that organizational change processes produce well-functioning results requires room for actual involvement and participation in forming the result, as

⁶⁹ Both terms of analytical and accomplishment rationality (“analyse og gjennomføringsrasjonalitet” in Norwegian) were first introduced to the discussion by the project manager (Øystei Fossen).

well as loops of continuous improvement, feedback and adjustments. Hence, open space for necessary involvement in the process is partly in conflict and positioned in opposition to the analytical rationality, where the need is to detail as much as possible in advance. This immanent conflict and paradox between analytical- and accomplishment rationality has to be resolved, and one of the key improvements in terms of resolving the conflict of this dichotomy was achieved in our case by bringing in the Socio-technical concept of Minimum Critical Specifications (MCS). This turned out to be a fruitful improvement of the internal discourses, and turned the discussions towards the critical frames and specifications, guiding principles for the future that had to be in place in order to secure a process of high involvement, replacing the focus on detailed specifications -- thus creating congruence with the principles for the wanted results of autonomy.

These were two of the key conceptual improvements of the discourses of the organizational development process, which helped translate the technology-dominated language and rationality into a more process-oriented one. In the next part I will sketch out some of the key activities and actual arenas where these language and rationality interventions were re-worked further, and how it came to dominate parts of the overall design; as well as some of the content of gatherings and integrated training seminars for both leaders and operators.

Key Actions: From model implementation to participation

In addition to feeding these analytical points back through the consequence analysis and the project work, we were employed to facilitate the main activities of the “implementation process”. Through training seminars for the new teams of operators and the team of leaders, the conceptual framing of the participation was further elaborated into the ruling rationality through participation-based forming of the actual model and its steps of execution. Particularly, the reworking of the MCS for *team responsibility* played a crucial role in the team development process.

More concretely, we facilitated and co-designed a wide set of arenas to both prepare for the changes in advance, as well as to make possible a process of more than two

years of experience and evaluations. The first seminars designed and arranged after the preparation and documentation phase of the project group, as well as the consequence analysis, were specifically devised to initiate the actual start-up of the teams.⁷⁰ In accordance with the key points made above, these seminars functioned as a structured arena for participating in the forming of team development and team responsibilities (the teams were composed on the basis of task analyses and dependencies in advance). Here we took into account the known pitfalls and challenges from earlier experiences of the organizational form, as well as elements from the research, such as the diffusion of responsibility in teams; the placing of previous leadership functions in team roles; dynamics connected to established dependency toward leaders; coordination between teams, and so on. The team tasks were designed to concretely prepare for ways of handling and further developing such issues, both in terms of actions to be taken during our very first tour offshore, as well as in terms of handling team development in a long-term perspective.

The next batch of seminars were particularly tuned towards developing the diverse set of leadership functions distributed into the team roles, as well as a more gradual development of the teams' responsibility. The team roles were voluntarily distributed and additional responsibilities were given to members of the team for some time, with the intention of rotating these after a period of one to two years. Typical roles were connected to an extra responsibility for planning the tasks for the team; for coordination in and between teams; for health-security, and environment issues (HSE); and other functions previously part of the responsibility of the department leader. The team tasks for these seminars were connected to experiences of crucial development topics; the creation of involvement amongst team members; the prioritization of tasks; the development of professional role networks; and plans for further knowledge production and competence achievements in the organization.

After a period of approximately two years of experience with the development of these organizational principles, we participated in a general evaluation for this production unit, as well as a new set of training seminars to further develop identified

⁷⁰ Due to the offshore rotation and 3-shift model, each activity had to be multiplied by three, and each activity had to be arranged three times. This gave additional opportunity for making adjustments and improvements from time to time, but the general pattern and topics remained stable.

challenges. This follow-up project is a bit peripheral to the initial observations, analyses and improvements presented here, but it was built on the same type of logic. Accordingly, we started with a re-contracting of the task based on a standard evaluation, and ended up working more within the genre of performative and process oriented evaluations. To give a glimpse, the main topics of improvements exposed in this evaluation process centred around adjustments of elements in the meeting structure; limitations in the use of physical facilities that were originally built to support a more segregated organization; improvements of HSE procedures, prioritising and processes in the teams; the production of handbooks for team roles as well as further development of the formal roles; and technicalities connected to the efficient use of SAP as a feedback and control system for teams. In short, even though it is also here difficult to calculate any direct effects of interventions, the general experience that was built through the interviews and seminars supported the general conclusion from other change processes: The relatively extensive participation and the process design in the early phase of preparation and change had led this production unit far ahead of most of the others in the company when it came to applying the principles of a team-based organization, as well as creating a shift in the language applied. Central principles of participation were no longer questioned but seemed to be a natural part of the discussion.

Experiential Consequences

In addition to the experiences discussed above, this project also contributed significantly to overall positioning as well as knowledge-production with consequences for the later projects. Two levels of typical consequences are worth elaborating, *first* some of the consequences for the positioning of the research group and further projects; and *second*, some thematic areas of importance for the further development of interventions – and particularly the projects connected to integrated leadership development, as the experiences from this project also gave practical and detailed insights which were later applied in projects directed towards leadership development.

Consequences for other projects in the system:

At the time of completing the first set of activities in this project, the development and change processes for the other production units were in their initial phase, and the political debates of resistance and motivation in the overall system were starting to rule the development process and the everyday agenda. The discussions and their effects penetrated all thematic areas and levels: The unions argued that additional payment was necessary for making their members accept the added tasks and responsibility implied in cross-functional and autonomous teams; many of the affected leaders were fighting to keep their responsibilities and their role of authority in the changed organizations; evaluations and work environment measures were used as political instruments to support resistance as well as motivation for change, and applied as arguments for setbacks as well as achievements; some units spent heavy efforts and large resources on making the new regime work, while others merely drew a new organizational map and practised as before; rumours of both success and failures were ripe in the system; and generally speaking, the debate became polarized between supporters and resisters.

In the middle of these large conflicts of interests and political debates, the group of internal consultants was hired and given the dubious task of facilitating the many local processes, and they seemed also to be placed in the impossible roles of being outsiders given responsibility for the eventual success or failure of the local process. In this rather chaotic picture we were lucky enough to be one of two (the Aasgard project and this project) projects where the changes to a large extent were assessed as being on the right track, and where the evaluations clearly showed that literally no one would want to return to the previous or initial organizational mode. And this position seemed to contribute both to a closer integration with the internal consultants, as well as to credibility in other parts of the organization. Eventually, it also led to a position where the project manager (Øystein Fossen) of the group was invited into other levels of the organization and into strategic discussions of how to deal with the overall situation. Among the elements brought in was the experienced importance of the role of the front line leaders in the change process, a factor which contributed to the initiation of the later design and establishment of the integrated leadership development program.

Consequences for the later interventions:

Participation in this project also provided insight into the political working of the large system, both directly and indirectly. As a contribution towards understanding the dynamics of large system organizational change I will highlight four topics which are also related to, and which influenced, the interventional strategy in later projects:

First, the difficulties of establishing diffusion of the change, and of learning from those projects that were doing well, illustrated that the logic of pilot projects and test cases are of a different kind when it comes to organizational processes, than when the development is dominated by technological elements. This is particularly true in the sense that it is close to impossible to copy and diffuse the organizational models, unless one bases the diffusion on the basic principles of design for the change process, rather than on the organizational model. Lack of diffusion seemed not only to affect the overall process, but also to create a situation where the lack of success in other production units seemed to put less pressure on those doing well, creating a growing mistrust as to whether it was necessary to put all their available resources into it, when other units seemed to “get away” without doing much. Consequently, the lack of diffusion also seemed to affect motivation and caused regressions and setbacks for those who were putting enough efforts into a well-run participation-based process. These kinds of insights also manifested themselves later as part of the design for the integrated leadership development program, where one of many intentions was to build competence on principles for designing and handling organizational change and development. The combination of descriptions of earlier experiences of both lack of diffusion and its reasons (both in the mentioned experiment conducted in the sixties, and as illustrated by Aslaksen, 1999), and our own experiences of the crucial role of front line leaders, led toward an increased focus on leadership.

Second, the project created insights of great value in terms of understanding the importance of leadership competence in running organizational change processes. For this case, what seemed to look like an applied language dominated by a technological rationality, the discussions were more about fighting over what the organizational model was really like, rather than focussing on the role of leaders in designing developmental processes. There was an experienced need for increasing the abilities and understanding of front line leaders to run and be responsible for

participation-based development. This was also part of the later rationale for establishing an integrated leadership development – an arena where the system could develop and “train the trainers”. Moreover, part of this training was conceptualized as language development and interventions into technology-based rationality (as further discussed and illustrated in part 4.5.).

Third, it was one of the first projects which started to point out and make clear the necessity of a clearer conceptualization and language of parallel rationalities as such. As exemplified through the simple conceptual distinction between analytical and accomplishment rationality, paradoxical needs rule the development process, and mastering these requires an apparatus and understanding capable of handling the paradoxes of large system change. As such, it helped elicit an understanding of language and parallel rationality that was later applied in the integrated leadership development program, and further developed in part 4.6.

Fourth, and as an extension from the previous project, it built further on the conceptualization of the role of the researcher, and through reflecting back our analysis and concepts, the interventions once again also brought in dimensions not already part of the internal discourses. Furthermore, the project is another example of a project not initially designed as ideal for an AR approach, but through some translations and re-contracting of the mandate it became better suited to this approach. The adaptations which meant putting the efforts into the design of processes, rather than just analysing the consequences of an organizational model, were particularly useful in this respect – aligning it with an emphasis which seems to be one of the common denominators for AR project in general.

4.3 Project three: the Centralization of Functions

Like the one discussed above, this third was also initiated as a project where we were asked to do a consequence analysis connected to the centralization of some functions previously part of the responsibilities of the local offshore production units. Analytically it has similarities to the previous project, as this one too entailed a kind of analysis of a prescribed future organizational structure and *model*, although its implications were of importance to the whole part of the system dealing with exploration and production of oil on the Norwegian continental shelf, rather than just to one offshore production unit.

The background for the project was a highly de-centralized offshore exploration and production organization for activities on the Norwegian continental shelf, where each production unit was historically run as a rather autonomous unit and almost as a separate company. The stated need for change was primarily connected to two main areas of development: Firstly, the realization of synergies connected to the merging of similar activities spread amongst the production units and the need to foster learning and development of best practice across the units. Secondly, the main areas of production were in their tail phase,⁷¹ with increased costs and decreasing production connected to each unit, and the objective was to initiate larger and central organizational units that would help increase the exploitation and life span of the field. Or to site one of the internal project managers:

"...to be prepared for the phase of tail production we need a more flexible organization, characterized by more personnel mobility, and increased change competence. Hence, the main project group will deliver suggestions for a new organizational structure. The more practical considerations on implementation are left to the new group of leaders that will be employed within the new structure. Basically, the suggestions of the group point toward

⁷¹ Tail phase refers to the last phase of a production area where the tail of the graph of production earnings crosses or dips below the production costs.

a strengthening of the organization of the area as whole, at the expense of each production unit. The result will be increased flexibility and synergy.”

The quote above was typical for both leaders and members of the project group planning for the structural change. Compared to the contemporary literature on organizational theory and its canonical development, as discussed in part two, it is reasonable to guess that the words *flexible, personnel mobility, increased change competence, strengthening of the area, and synergy*, are all typical “plus and buzz words” one would find in almost any organizational development process.

The mandate of this project group was accordingly to identify centralization synergies and cost reductions, and to make suggestions for how to structure a new common organizational unit serving the area as a whole. By mandate they were not responsible for the change process, but only for the planning activities to be carried out in advance. Furthermore, the mandate of the consequence analysis (our group) was to analyse the organizational consequences of these suggestions, as a part of the formal prerequisites for large organizational change in oil production. In this work, the focus was particularly on consequences affecting the field of Security-Health-Environment (SHE), personnel, and organization. During the analyses the data gathering consisted of participation in the regular meetings of the project group, interviews with the leaders involved, conversations with stakeholders and departments in affected organizational units, and involvement of unions and representatives in the analytical process. Part of the addressed problem corresponded with the problems analysed in the previous project, namely how to point at organizational and other consequences in advance when the design of the process is the main determinant of consequences. Rather than repeat the main points from the previous analysis, I will expand on it, selecting some key observations and analyses more closely connected to the reasoning and legitimating of change, and to how this reasoning affects the process.

To further pinpoint elements of importance for large system change processes, I will give a short presentation of some key issues from this project, as these also illuminate elements of integration of leadership and organizational change. As a prelude to the next project discussed, the integrated leadership development

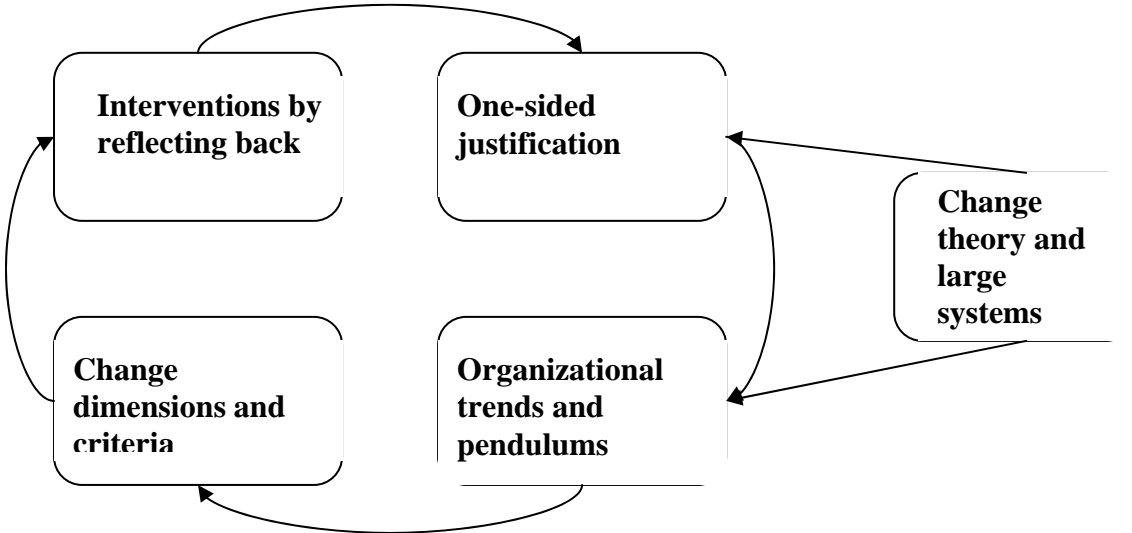
program, this also represents some of the first involvement in work with larger parts of the organization and the larger system as a “political whole”, and expands on questions related to the logic and language of parallel rationalities. In terms of the overall topic of the change process ruling the organization – the introduction of cross-functional and autonomous teams for the production units – the project is of less direct relevance as it primarily deals with other organizational topics. The selection of this project is therefore primarily legitimized through its contribution to understanding the logics of interventions in large system change, and particularly the relation between hierarchical levels in a large system.

The basic discussion in the project is about what seems to be an ever returning question in large systems: What kind of functions should be organized as central functions in centralized units and what kind of functions should be subject to decentralized organization and local control? Rather than to address directly the answers to such questions, the main point here is to focus on how such questions connect to processes of organizational development and particularly to the rationalities and the applied language. In relation to this project, the emphasis will be on some basic observations made about the applied rationales and legitimating of change; on how the rationality applied affects the process of change; and on how it might be acted upon through interventions. The basic observation relates to what seems to be a common perspective produced by organizational models (as discussed in Mintzberg, 1983). Any organizational end state, model or form, seems to lead to the production of arguments for the opposite organizational state, model or form – or at least something else than the present form – in the same sense that present states make “the grass look greener on the other side”. In this case the discussion is illustrated through a decentralized organization that produced arguments for centralization; and where the ensuing centralization of functions produced arguments for decentralization (the basic lines of this reasoning was also presented by Fossen and Karlsen (2003) as a summation of project experiences at the second EDWOR gathering).

First, this discussion will be introduced through the observations of different interest groups’ “one sided” justifications of the need for change. *Second*, these observations will be analysed in terms of the dialectical role of “pendulums and trends” for

organizational development. *Third*, the part on key improvements contains and deals with constitutive concepts – a set of dimensions named “dimensions of change”. These were results of the analysis made in the project group, and framed the initial feedback to the system. *Fourth*, the key actions designed for this particular project are discussed briefly in terms of the logic of presenting summations and constitutive concepts and creating interventions through “reflecting back”. Finally, some of the key experiential consequences are further discussed.

”The Centralization of Functions”



Project #3	Key Observations	Key Analysis	Key Improvement	Key Actions	Experiential Consequences
<p>The Centralization of functions:</p> <p>This project was about a process of centralization of a set of operational functions in the larger units of support systems for the continental shelf. Going from tasks distributed between local production units, the attempt was to create bigger centralized organizational units. The basic ambition was to prepare large production areas of the North Sea for its “tail phase” of production, by means of organizational synergies.</p>	<p>One-sided justifications:</p> <p>Different interest groups and groups of stakeholders represented diametrically opposite ways of arguing about this same topic. The different justifications were all about effects of the organizational models, but differed systematically depending on how the protagonists were potentially affected by the change. The one thing they all that in common, though, was the tendency to overly justify and argue for just one alternative.</p>	<p>Trends and Pendulums:</p> <p>Any organizational “end-state” has the potential to produce arguments for something else. For example dealing with a highly centralized organization it is easy to see the benefits of a more decentralized one, and vice versa. If this production of arguments is institutionalized as a project group or group of leaders, the phenomenon of “group thinking” can amplify such one-sided beliefs in that the grass is greener on the other side.</p>	<p>Introduction of “Change dimensions”:</p> <p>“Change dimensions” were presented as conceptual frames for interpretations of the common denominators of the suggested change. As well as representing an attempt to intervene in the existing language of change, our aim with these was to highlight the dichotomies of the process they represented – for example, how the displacement of authority affects the discourse and makes it difficult to sort out what is rational and what are merely psychologically grounded arguments.</p>	<p>Interventions through reflecting back:</p> <p>In addition to participation in project groups, the intervention of this project was basically made through reflecting back a conceptual language; for example as the introduction of analytical concepts for change in the steering documents of importance. As such, it consisted of processes of reflecting back the observations and analysis through institutionalized documents, in addition to the more “micro-level interventions” in the project group preparing for the process.</p>	<p>Parallel rationalities:</p> <p>Thematically, the role and concept of parallel rationalities in large systems has later contributed towards an increased sensitivity in terms of how to incorporate this concept into interventions, as well as in terms of the translation between them, and between hierarchical levels. As such, it has constituted a basic point of departure for leadership development efforts.</p> <p>The Institutionalization of interventions:</p> <p>This project was one of the first to operate with partly institutionalized interventions. The methodological outline became a preferred model for later projects. Moreover, the analysis was “planted” into the formal steering documents.</p>

Before exploring these steps, the main methodological selection criteria are revisited for this project:

1. **Relevance:** *Their ability to illuminate the overall research question:* This project also represents a partly indirect path toward the explicit discussion of the research question: In large corporations and systems the question of centralization versus de-centralization of functions connects directly both to the scope of leadership and to its integration into the organizational development. It also connects to the debate of specialization and coordination of functions and is particularly relevant if one can spot an overall developmental trend that goes toward the increased specialization of disciplines as well as an increased need for cross-functional cooperation. The projects analysed here focus particularly on the role of interventions and on understanding the relation between leadership and organization through an investigation of different rationalities.

2. **Validity:** *Their generic relevance beyond the particular project:* One could argue that centralization versus de-centralization is a continuous and dialectical process taking place in any organization of some size, and as such these analytical points are relevant for most organizations, and certainly for all large systems. This is particularly the case in relation to the identification of differences in rationalities and reasoning among those directly affected by change, and those in positions of making plans and taking decisions represent validity of a more actionable kind. The observations and analyses contribute towards a broader understanding of organizations as consisting of parallel and partly paradoxical rationalities, as well as of the possibilities and pitfalls associated with attempts to translate them.

3. **Usefulness:** *Their analytical points should contain clear consequences for the designed activities and actions:* In this project the main activities were connected to participation in meetings with leaders and project groups mainly working with preparation for the process of change. In contrast to the other projects, the activities and interventions in this one were based on contributions to these meetings, and on a more “micro interventional basis”, rather than on contribution through practical training and development conferences. Thus, the loci of the project have closer resemblance to the reality of staff functions and organizational realities distant from the primary

tasks of offshore oil production, providing useful insight into the language, rationality and practices of such functions.

4. **Cyclical development:** As a project focused mainly on the central staff functions, rather than on particular production units, it gave added insights into the political games of the system, and the multi rationalities that are combined in the forces that push and pull a large organization forward. The use and handling of these experiences also led to a series of projects related more to other parts of the large onshore staff organization, and to insights into its role in the overall production. Thus, it indirectly created forces supporting the development of the more focused integration of leadership development and organizational development, through an increased understanding of the different types of language used at different levels – and its translation processes -- as well as through increased understanding of pendulums and trends in large systems.

5. **Academic contribution:** *Their ability to connect to a theoretical debate in the field:* One of the many theoretical debates connected to this topic is how to coordinate and integrate the many disciplines necessary to handle the tasks of a large system. These constitute a complex set of arguments for both centralizations and de-centralizations of functions, and they often constitute and contribute to the many organizational paradoxes that have to be handled. One of the assumptions of these analyses is that the conceptual difficulties of dealing with parallel and paradoxical rationalities, make them topics one does best to avoid in academic contributions. Simply stated, the paradoxical complexity of large systems practice seems to be difficult to conceptualize in organizational models and analyses that strive for unity and definable consistency. If so, the consequence is a general broadening of the gap between academic theories and organizational practice. Hopefully, our action-oriented analysis will contribute towards an opposite effect.

6. **Personal interest:** *Intuitive energy and interest experienced by the researcher (me):* My professional interest is connected to the wide-ranging effects of cross-organizational changes which involve and illuminate the many forces acting upon large systems. For instance, how should one analyze the many political debates between different interest groups; their different rationalities; the complex interdependence between different parts of the organization; the extra-organizational influence on partners and suppliers; and the connections to the technological development that continuously changes the premises for both centralization and de-centralization. On top of this, being more or less directly involved with processes with high stakes and wide impacts nurtures the self-hubris, and working with higher practical risks creates a sense of realness not experienced all that often in an otherwise theory-driven world of research.

Key observations: One-sided justification

Part of the work with the consequence analysis involved participation in the meetings of the responsible project group. And one of the first things that stood out in the observations from these group meetings was the tendency to limit the discussion and the analysis to the malfunctioning dimensions of the de-centralized organization at present, and to the benefits of a more centralized service department. More precisely, the discussions were based on how the de-centralized units were a hindrance to more effective cross-corporative use of the knowledge and experiences of “best practice”. And along the same lines, the focus was tuned to the positive future effects of a more centralized organization, in terms of how it would both save resources, help coordination, and facilitate the wider use and generation of expert knowledge. In the discussion and presentation of observations here I will first sum up some of the main arguments used by the project group for a more centralized organization, and then compare these observations with the counter arguments met in other parts of the organization. This leads up to the key analysis, where I will try to offer some generic interpretations of this rather one-dimensional logic; identify how it resembles observations often made in leadership groups; and discuss what this says

about organizational development, as well as how these interpretations can be integrated into leadership development programs.

Typical examples of the observed reasoning connected to the centralization of functions were:

- *Strengthening of the central area dimension on behalf of the local units will make it easier to connect the resources to the tasks, and prioritize more effectively across units.*
- *Centralization will help create reduced offshore staff numbers and related costs.*
- *It will strengthen the ability to work across boundaries, and particularly across the traditionally strict organizational boundaries between off- and onshore units.*
- *Working across historically established boundaries will create better opportunities for learning and competence building.*
- *The steering, control, and coordination of larger projects and processes will be better, particularly for larger maintenance projects.*
- *Bigger and more united groups of disciplines and people will create better accomplishment of projects, in addition to improving the professional quality of work.*
- *The general coordination of people and resources will be better, and we will be better able to prioritize harder as to where the resources are spent.*
- *The aggregation of tasks will create more continuous handling of previously discontinuous solving – and this will increase the security, particularly in relation to complex tasks.*
- *Moving resources and areas of responsibility to central departments will increase the status of these functions and thereby improve the work conditions.*

All of these arguments presented by the project group are within the normal scope of arguments connected to the centralization of functions, and if one looks into the debate related to large organizational systems, at least in Norway, they could easily be translated into and found in a large number of

industries, both public and private, ranging from educational (universities) and healthcare systems to public management. The point here, though, is not to enter into an empirical assessment of their validity, but to say that so far, this establishes typical examples of the one-dimensional focus on positive effects, and on positive effects believed to result from the organizational model or structure as such.

Not very surprisingly, the picture was somewhat different when we talked to and interviewed those more directly affected by the suggestions. This applied irrespective of whether the interviewees were offshore operators who could expect changes in terms of their organizational belonging; leaders of the local units who could expect changes to their areas of responsibility and authority; union representatives; or other stakeholders. For those directly affected, with very few exceptions, the picture given was one of complete opposition, with the same one-dimensionality of reasoning, and with the same arguments connected to the characteristics “inherited” in the suggestions of model and structure.

Typical examples of observed reasoning and quotes connected to those directly affected by the centralization of functions were:

- *The increased distance between the central coordinating units and the local operational units will produce heavy bureaucratization, slow progress in executive work, and general problems of bureaucratic coordination.*
- *The suggested organizational distinctions between “local” daily operations and “central” long-term tasks are artificial, and an organizational divide will reduce the quality of this work.*
- *The organizational divide will not work because those handling the daily operations are the experts on the equipment and the technology, and have to be involved in long-term prioritization and projects anyway.*
- *The model presupposes a shared responsibility for tasks and resources between local and central units. This will make it difficult to prioritize when there are different interests between the departments and levels.*

- *The model presuppose increased work rotation and geographic mobility, and this will reduce the experience of organizational belonging and the responsibility for and ownership of one's own machinery, as well as inhibit positive effects of a stable and persistent work environment.*
- *Increased distance to the daily operations will decrease the detail-competency particular for each production unit.*
- *Stress and uncertainty connected to future positions and belonging will reduce the possibility to realize the gains.*
- *Historically, the remoteness of central departments and their lack of operational attachment has given them a low professional status and made it less attractive to be part of them. The resistance to moving into centralized departments will be huge.*

Again, if one was to take a more direct empirical stand and analyse the arguments, it would be relatively easy to find a general support for the arguments in favour of centralization as well as for those promoting de-centralization. As such, the arguments from both sides are sound when it comes to general experiences. In general, it is likely that all of them represent a wide set of practical examples of validity. The more psychologically-based motivation for landing on either of the two sides seems rather clear in this case. The project group had as a mandate to find and establish arguments and structures for centralization, and the success criterion of their product was perceived as the ability to produce these. Those who were likely to be more directly affected by the suggestions were faced with a rather unknown and unpredictable future situation, and the normal response in such situations is to come up with and focus on the arguments for why the production of this insecurity is spurious.

Empirically speaking, both "parties" can be said to be right as there exist pros and cons both for the centralization and the de-centralization of functions. In order to understand and be able to deal with such paradoxical natures of organizations, and their effects on leadership and development – particularly in large systems – the key analysis here will give a possible answer through looking into the dialectics of organizational trends and historical pendulums.

Key Analysis: Organizational Trends and Pendulums

In the analysis of these observations I will *firstly* highlight one of the dimensions described, namely that any organizational present state will have a tendency to produce arguments for something else. *Secondly*, I will reflect the phenomenon of one-dimensional reasoning encountered here against the one often observed between groups of leaders and employees in change processes.

The first key analysis of this observed phenomenon is that large systems will always engage in certain dialectical and continuous discourses on organizational forms. Due to the inherited imperfection, particularly in large and complex systems – but in any organizational form for that matter – there is naturally ample possibility for identifying organizational shortcomings in a highly qualified way. And in line with one of the main points of Morgan's (1997) analysis of organizational images, we can state that organizational structures, models, and maps are to be understood as metaphors. Accordingly, it is practically impossible to single out the best organizational model –or metaphor – in the complexity of large systems. Organizational metaphors, like any metaphor, will always and by nature capture only some parts of the actual processes, and thereby also work partly as caricatures: They simplify, highlight, betray and reveal actual relational and constitutive processes. It is possible, then, to see that any organizational model is always rather open to, and is often hit by, highly valid critique. In addition, groups of leaders and decision makers are often driven by internal and external demands to create change for the better on a set of dimensions, among which are found organizational form and structure. For instance, in this company one of the five main demands put upon every leader is to continuously drive change both within existing organizational forms and by creating new organizational forms.⁷² Simultaneously, a large industry of consultants and others are continuously pushing new concepts, models, communication and steering mechanisms, and so on. This combination of an ever-existing present organizational state of being hit by critique, a continuous motivation to drive change, and a continuous and massive supply of new concepts might contribute towards understanding some of the common

⁷² The other three dimensions are: deliver results, develop people, and demonstrate integrity, all of which are divided into a wide set of operational under-categories (and like most popular leadership models, they all sum up to a simple and easy-to-remember abbreviation: The four D's).

organizational pendulums, and particularly the one alternating between centralization and de-centralization. When the present state is, as in this case, characterized by highly de-centralized functions, there will always be an experience of problems and shortcomings that could be solved by centralized functions. On the other hand, a more centralized organization will again produce an experience of problems that could be solved by more de-centralization. Such discourses will have a large set of different expressions and historical variations, but will always be a part of the internal considerations. The observations presented above fit in to this picture, and can be analysed as the always existing possibility for finding both support for the present state, and for having its flaws pointed out. For the leaders initiating the process and for the project group, their stance can be said to be based on the “perceptual” tendency to easily notice today’s problems, and at the same time to anticipate the greenness of the grass on the possible future side.⁷³

In the literature and research on both groups and groups of leaders, the tendency to create and overly justify a one-dimensional picture is well documented. The phenomenon called “group think”, originally described by Janis (1982), has become the name for the tendency to create unified consensus of reality in groups, and accordingly an exaggerated rejection of alternative or contrasting factual insights. And as these studies document, the strive for a unified internal harmony and avoidance of openly expressed disagreements can of course lead to risky decisions and overly simplified pictures of complex processes. There exists a large number of theoretical perspectives trying to explain these group processes, and a number of practical methods have been developed in order to avoid them (see for example Yukl, 2006). I will not explore these theories for the purpose here, but just use the fact of their widespread existence to show that there is nothing extraordinary in the observations made of a project group systematically searching for and identifying elements that support their mandate and external expectations. This dynamic creates

⁷³ Based on impressions from talking to other researchers and central actors who have followed the company’s story from the outside, as well as on the many conversations made with those who have been part of the company as employees or leaders on the inside, the picture tends to be confirmed of a historical pendulum swinging between arguments and trends for centralization versus de-centralization partly following the same pattern (even though the pendulum metaphor has to be justified by a historical shift in the point it is hanging from).

problems, of course, when the solutions suggested are to be realized, and when the resistance to change amongst those affected produces an oppositional logic and rationality; a logic characterised by a systematic search directed towards the counterarguments. The observation is analogous to what leadership groups characterized by groupthink normally experience when what in the group discussions seems like a well-justified plan (ibid), is hindered in its practical implementation by counterarguments and resistance.

Both these two lines of reasoning – that any organizational state has a tendency to produce arguments for the opposite, as well as the tendency amongst project groups and leadership groups to produce one-dimensional pictures – ask for a conceptual translation when it comes to organizational change processes. In the previous part, the strategy was to contribute to the translation of technological rationality into a rationality better suited for social processes, and accordingly, the key interventions made here consisted of reflecting back the analyses made and using them actively in the further process of re-organization. Rather than directly exploring each of the arguments presented either for or against the suggested model, this was basically done indirectly through the introduction of feedback of what was called change dimensions; through focussing on the introduction and starting process; and through the identification of compensating actions connected to the consequences of the arguments. As such the intervention made in this part based more on reflecting back analyses of the parallel rationalities, rather than on directly arguing for the consequences of one or the other organizational model based on an outsider perspective.

Key Improvements: Introduction of Change Dimensions

I will first describe some “change dimensions” introduced as part of the consequence analysis; and then elements highlighted as the “introduction process”; and finally some typical examples of “compensating actions”. As the mandate was connected to and part of creating analyses of consequences, just as for the previous project, it had to be partly re-contracted and treated as something else than identification of direct consequences of an organizational model. In essence, although not formally, the

decision to implement a more centralized structure had already been made at this point, and the heavy political winds towards more efficient structures in the mature areas of the continental shelf were dominant. Thus, the introduction of “change dimensions”, as well as a process focus and the “compensating actions”, were all interventions to (co-) create a language and understanding better suited to imminent changes⁷⁴.

The “change dimensions” were presented as conceptual frameworks for interpretation of the common denominators of the suggested change, with the aim of highlighting the dichotomies of the process they represented. At the same time, they represented an attempt to intervene in the existing language of change; and constitute the interpretational framework we used to feed back the analyses of our observations.

The first of these change factors was connected to change within the *structure of steering and responsibility* and the logic where the gains of more central coordination and control are expected to surpass the disadvantages of decreased scope for local adaptation and action. And in order to transcend the general discourses of whether this change of structure is good or bad as such, the assessments based on efficiency in terms of the coordination of task-solving tasks were highlighted. The change dimension was introduced as one moving the focus away from the structure, and into the more concrete analysis of tasks. This was done with the intention of both getting out of the “blocked” discussion of model characteristics and into a more pragmatic discussion about the coordination of tasks. The idea of creating a more pragmatic basis for the analysis was also rooted in the intentions to create more widely accepted criteria for the prioritization of resources, as well as a discourse more open to the necessary participation of the local operators and expertise.

The second dimension introduced was connected more closely to the *displacement of control and authority*. When control and decision authority are displaced or transferred to more central levels, other and local areas of the organizational line have to relinquish similar authority. It can be said to be rather normal that

The term "Change Dimensions" was initially brought in by the project manager and further developed through the group discussions of the project group.

displacements of control and authority, and changes in power relations, evoke resistance and produce defensive stances. One consequence is that rational arguments are mixed with psychological arguments for the sake of protecting existing positions of power. It then becomes crucial to be aware of these processes and to have a strategy for handling them. One way to possibly increase the acceptance of such displacement is to document actual examples of gains during the process. But it is probably more important to institutionalize “a forced” cooperation through common measured parameters and objectives for the central and the local units and leaders responsible. Therefore, the intervention was to discuss and introduce elements and areas of common and mutual achievement contracts for the units and leaders. This was highlighted to strengthen the realization of gains through imposed cooperation through shared responsibility, rather than leave the situation open to fights over management turfs. The intervention was also based on a general experience of “what is measured” in the achievement contracts “is what gets attention”. Creating mutual and common objectives for the ones responsible on the central and the local arena was believed to also help institutionalize the cooperation.

The third change dimension referred to *changes of identity and belonging* and was about the general ties one has to the local work and work environment. Particularly for this case, as the present environment had been relatively stable for a long time, the work environment was generally experienced as positive: local culture and ties among colleagues had been able to grow strong. The structures of responsibility and the organizational belonging were perceived as clear and unambiguous. The eventual resistance toward change and the scepticism observed toward centralization can therefore reasonably be emotionally connected to workplace identity and belonging. The interventional strategy here was not to raise these issues to – as often is the case – reject the arguments as invalid due to their emotional grounding, but rather the opposite; to highlight these emotional dimensions as crucial for the realization of new structures. Changes of identity and belonging can both one-sidedly and defensively lead to arguments for why a shift in structure is unfruitful, but as observed, they may just as well help raise very good and rational objections against any given element of an organizational model. Being aware of these dimensions and being able to run discourses which mix both rational and emotional dimensions is crucial; and this seems to normally affect the outcome of the process.

In this case the conducted interviews displayed a strong discipline-based identity; they expressed strong connections and identity towards their own areas of expertise, and concern about the ability and capacity to further develop professional expertise. As a result, the opportunities and systematic systems for professional development and learning were put at the core of the process. And the prospect and aim of systematic specialist training was partly introduced to compensate for the loss of local identity and belongings.

The concept of “change dimensions” was brought up in the written reports; but more importantly, also as part of the many discussions with different sets of stakeholders in the process to produce the consequence analysis; as well as in the project recommendations (see key actions). Further, the basic analytical perspective is the same as in the previous project analysis, where the conclusive success factor of the change process lies in the design and structuring of the process, and the eventual good or bad consequences is an inseparable sum of process and model. Derived from this logic and from the fact that the implementation and design of the process were not part of the mandate for the project group, some central elements and suggestions for the further process were developed during the discussions and interviews, and highlighted as part of the planning instrument:

Firstly, to diminish the segregation between those who suggest, and those who implement the change, and to use all the input and partly tacit knowledge of the project group, a continuity of personnel was established. *Secondly*, to decrease the period of uncertainty, early selection of leaders with competency on process implementation and the enmeshing of organizational parts was suggested. *Thirdly*, tailor-made leadership development efforts for the new leadership teams, with a particular focus on analysing and handling centralization topics, as well as working in a central-local matrix were dimensions of mutual cooperation, and dependencies became crucial. *Fourthly*, periods of reorganization will always more or less distract focus from the daily operations, and particularly in high-risk environments like this, changes demand a particular and often extraordinary focus on security issues. *Fifthly*, using the already existing processes as driving forces was considered crucial. Professional belonging and networks existed also outside the local areas, and were to be more systematically developed into becoming an integrated part of the

centralization. *Sixthly*, other parts of our work had given valuable insight into processes in another part of the company, and emphasis was put on creating a more explicit connection to other similar efforts in the company, and to the overall strategy of the EPN (Exploration and Production Norway) business area, for the sake of communicating more clearly the basic intentions. *Seventhly*, and fundamental for our experiences – as it goes almost without saying - it is always necessary to actively cooperate with the workers' unions to create effective change processes. *Eighthly*, in order to secure continuous improvement and motivation for further learning, it was suggested that the results should be made explicit, and that different kinds of balanced feedback should be used to help keep the momentum of the development processes.⁷⁵

Analogous to the elements highlighted for the further execution of the process, part of the consequence analysis was also to explore in greater detail the suggested structural change for the organizational departments affected. Through interviews with those affected, the experienced positive and negative consequences were identified and described in detail on the local level, and for the identified negative consequences, suggestions were prepared for “compensating actions”. These are too detailed for the purpose of this analysis, but were typically particular efforts connected to struggles of local job rotation: how to handle structural interdependencies of responsibility: strategies for concrete courses and on the job training; local solutions to SHE issues and so on.

Key actions: Reflecting Back

The introduction of “change dimensions” and the particular focus on execution process design were both interventions used in the discourses with the project group and with other stakeholders either interviewed or directly involved. As such, the key actions here were both indirect and direct language interventions through the introduction of the analysis and improvements described above. This was done as a

⁷⁵ The ambitions of evaluations and other more measurable feedback do, however, need to be adjusted to the phase of development the change process has entered. A normal “error” observed in this system seems to be to expect too much effect in too little time, and evaluations are often designed and exploited for the merely political end of supporting a particular interest. Evaluations made on such premises will, then, not help motivate the process.

way to bring in new dimensions and contribute to development of the discourse by restructuring the “one-sided” language and rationality applied, and the considerations of the role of the researcher were as such basically similar to those of the previous projects. The key actions then were of a more theoretical kind, as they were formulated primarily in texts and documents, and particularly in documents further applied as tools for the decision-makers to design the further and more practical process, as a kind of non-human actors. But creating language interventions solely within the documents of the project group would most likely limit the effect of creating a stronger focus on the process to this group rather than make it apply to a wider set of involved and affected parties. Therefore, added forms of involvement and actions were seen as necessary.

For any action-oriented researcher it is to be taken for granted that the broad participation and involvement of affected stakeholders and representatives is crucial for the development and execution of change processes. Nevertheless, judging by our encounters with new organizations, or new departments, the common experience seems to be that the rational and ethical necessity of participation and involvement is not considered a crucial part of the process; it is, rather, believed to be something that someone else can take care of in a later step, as was also initially the case for those involved in the current process.

In order to create the necessary dialogue in an early phase; to make the interventions more effectual and as an intervention in itself; and to secure that participation would become part of the preparation phase as well as the execution phase, part of the re-contracting of the consequence analysis project was also to secure that a wider set of people were involved than just the project group and the researchers. Hence, part of the actions was to establish an expanded work group – or a working steering committee – to frame the consequence analysis. This group consisted of representatives from all the unions involved (7), of representatives from “vernetjenesten” (i.e. the health and safety department) (3), the project management for each part of the project groups (6), and the leaders responsible for the initiatives (3). This group was involved in discussions of all the important dimensions to be developed and constructed by the basic consequence analysis work group, which again was composed of professionally diverse representatives from staff functions of

the company. These representatives were from the internal consultant for “change support department”,⁷⁶ the internal staff department for personnel and organization (P&O), the internal department for Safety, Health and Environment (SHE), as well as including representatives from one of the local off-shore units. Moreover, the practical work consisted of a wide set of interviews and dialogues with stakeholders and affected personnel across the business unit. Hence, the key activities connected to the re-contracting secured a broad and indirect involvement otherwise not accomplished. For a business unit consisting of some thousand employees – with the vast amount working off-shore – finding sufficient practical ways of securing participation and involvement always represents a great challenge. In this planning and early phase of the change process, the interventions contributed towards indirect participation as described above, and the focus on the execution process, the change dimensions, and the analysis, contributed premises for the execution and helped establish discourses of participation along the way. And as mentioned, the key activities in this project were more indirect than for the previous projects, through a process of reflecting back analyses, and through language interventions rather than massive and actual designs and the implementation of developmental activities.

In terms of institutionalizing and creating more sustainable language interventions, the experience is that planting written texts with a formal purpose (e.g. consequence analysis) increases the likelihood of an actual effect of bringing in new concepts, dimensions, or elements from “other” rationalities. Although it is difficult to directly track such effects given the many forces that help form the internal discourses – in this case both the structure of involvement during the process, as well as the analytical points; they change the dimensions and the logic of compensating actions. Moreover, the disposition of the analysis also became a template for later consequence analyses. The report provided the foundational principles for the design of the particular process, as a combination of the many derived demands to make similar analyses; and this intervention seems to have had an overall and long term effect for the design and accomplishment of change. In addition to the more general pedagogical considerations that reading texts in addition to analysing dialogues will

⁷⁶ A department with which over a long period of time we have had, and continue to have, close cooperation and many mutual projects, resulting in the co-construction of a shared understanding of the participative challenges of the company.

have a stronger impact, the concrete experience in this case was also that texts can institutionalize themselves as templates and travel as non-human and “interventional actors” over time. The basic interventional strategy, then, was to mirror and reflect back the existing dialectic between centralization and decentralisation, in order to make it more actionable than the abstract and one-dimensional debate of whether the proposed changes were inherently and empirically “good or bad”. But with the exception of these sets of indicators of possible effects, we have not been able to make an overall evaluation of this project of organizational change, or been in a practical setting where such evaluation has been possible⁷⁷.

Experiential Consequences

I will here first identify some post-reflections on the external and material drivers involved, that is the non-human actors; and second, sum up the main experiential consequences of this project.

As has been the case for the conflict handling project, the external and material factors driving the demands for change have later gone through partly unexpected and qualitative changes that affect the organization as a whole. Initially, the main driver and motivation for this project consisted of the challenges of “tail phase production”. It was mainly conducted in 2002, and only a few years later particularly two main dimensions have contributed towards significantly changing the picture: Firstly, the increase in oil prices moved the crossing point of outlays and income many years into the future, thus decreasing the acuteness of this change, and making it lucrative to make local investments in, rather than to de-build, the old installations. Parallel to this, the technology for exploitation of the old fields through new and cheaper methods has experienced advances of enormous proportions, particularly in terms of unmanned sub sea installations and remote onshore-based production processes. In sum, this means that the discourses ruling this particular field of the continental shelf have changed rather dramatically over the six-year period, going from the question of how to change into cross-functional and

⁷⁷ Even so, the lack of systematic evaluation might contribute to a picture of a rather well-run process of change, as our experience is a normal tendency in this system that the demands for evaluations are much stronger when processes fail, than when they are considered to be effective in normal terms.

autonomous teams on each production unit, via how to centralize certain functions to survive and exploit the tail phase, to the current concern of exploiting changes in oil prices and better applying the “exponential” increase in technological innovations. These innovations also include technologies which dramatically increasing the amount of oil it is technologically possible to derive from a field. And interestingly in retrospect, it seems that the initial preparation for more cross-functional and team-based organizations, has also had the overall effect of enabling the organization to better handle the other shifts that have been brought on by these factors. Particularly the advances within the technology applied creates a more natural cross-functional handling of the basic tasks of production, and rather than as part of the general organizational change process and the efforts connected to this process, many of the basic principles of cross-functional teams have only been able to diffuse due to more task and technology driven innovations.

The main consequences of this project in relation to, and as a foundation for, later projects are connected to the structuring logic of “consequence analysis”. As mentioned, the grammatical as well as the main categories introduced partly became a guideline for the regime of consequence analysis, while they also created different sets of later demands for the project group to accomplish further analysis. And almost without exception, these later projects have in their turn led to further practical development activities involving different kinds of integrated leadership development. For example, a project of recent leadership development activities connected to development of the department for corporate communication and its role in internal development processes. The introduction of concepts such as the ones in “change dimensions”, emphasizing introduction and “implementation” processes, and the use and identification of “compensating actions”, has become part of the logic for later projects of a similar kind, and has been applied both by the project group and by internal consultants and employees in the particular departments. As such, and on a project level, the experiences from this project have later functioned as an opener into other parts of the organization, and lately into leadership development projects in the departments of corporate communication and information (which in its turn has contributed towards highlighting yet another language and communicative and centralized dimension to which organizational development processes should be applied). For the integration of leadership and organizational development, however,

the main consequences and experiences are of a thematic, rather than of a project kind.

The Institutionalization of Interventions

Even though these project experiences resulted in demands for further projects of the same kind, as well as a certain dissemination of and demands for further use of this method, this cannot be said to really qualify as anything amounting to the institutionalization of an intervention method; it did, however, contribute to the overall reflections on how to create more sustainable interventions. This goes particularly for creating interventions on how to contribute to overcoming the partly conflicting perspectives of different rationalities, and how to foster translations and bring in elements of an applied language more attuned to fostering organizational development. In itself, phrasing this kind of interventions and activities as language interventions, also points toward a metaphorical picture of organizational change processes of this kind as a long term maturation process. Making sense of language development implies a long-term process, high degrees of involvement, and a clear link to practice. This perspective rules out the possibility of treating change as it constitutes a quick fix, or in terms of more “technological implementations”, and it helps highlight the question on how to foster and secure the long-term maturation of language development in a large system driven by paradoxical and numerous heavy forces (material as well as social and political). And to be sure, making a contribution in the shape of a changed conception on how to conduct a “consequence analysis” is not going to make a difference as an isolated fact, rather the opposite; a fact which contributes to the acknowledgement of interventional challenges.

Reflections and experiences from the more central part of the system also helped inform important elements of the further integration of leadership development, particularly in the sense that the design was made to help master, understand and manage the endless and continuous stream of new concepts, trends and pendulum movements related to organizational development; but also in terms of how such trends need to be translated from objectified things – and technological rationality – towards approaches attuned to social and organizational development processes. Such translation of trends, as well as concepts like minimum critical specifications, together with change dimensions such as task orientation, identity and belonging,

and mutual achievement contracts, provide the distinction between continuous development and substantial shifts. The project also gave good empirical insights into the different rationalities ruling different levels of the hierarchy and the continuous need to create arenas where vertical translations are considered.

4.4 The Challenges of Interventions (two).

The theory discussion of part two ends with an attempt to conceptualize and put into words three dimensions that are of importance to Action Research interventions, and which represent some of the important challenges to take into consideration if one wants to further develop the interventional approach. The three dimensions and challenges of interventions are given the names “Regression Effects and Single Projects“, “Non-Human Actors”, and “Enabling of Leaders”. As the actual identification and selection of these four dimensions has been both theoretically and experientially grounded, and has partly taken place in retrospect, part of the identification of these topics as challenges was made throughout the actual implementation of the projects. As a result, the short summation here is particularly focused on how the projects presented were part of the experiences that legitimated the formulation of these dimensions, and on how these insights helped inform the design of the next project discussed as well as the generic elements of Reflexive Machineries (part 4.5). These discussions on the challenges of interventions, but more directly related to prescriptive design elements of interventions, are also further addressed in part 5.2. (The Challenges of Interventions: Three). More precisely, these cyclical consequences are related to an increased interest in the necessity of institutionalizing interventions, and as such they can be seen as a precondition and predecessor for the oxymoron of Reflexive Machineries, where the term machinery connotes directly to institutionalization.

The term “Regression Effects” relates to the challenges involved when one wants to bring insights and motivation created in separate development initiatives into the daily operations and everyday context of organizational work, or in other words to create interventions with the ability of having sustained effects; whether these initiatives are organized as seminars, conferences, projects groups outside the hierarchical order,

or as other kinds of separate activities with developmental ambitions. Moreover, “Single Projects” simply refers to initiatives with a limited lifespan, often initiated to deal with initiatives and activities outside the “daily operations”. For example, all of the three projects examined above represent such efforts. Single-projects such as these have as their common ambition to result in activities and effects lasting longer than the lifespan of the single-project, and the challenges related to such effects are naturally tied to the ability to achieve such “out of project” consequences and effects. In this respect, sustained effects is a common denominator relevant for both “regression effects” and “single projects”. The term “Non-human Actors” is applied several times during the analysis and refers specifically to the factors and forces that are of relevance to and have direct effects on or penetrate the developmental dialogues of the participants. These factors can be both of an external and an internal kind, and the examples from the analysis refer to elements ranging from new technology and oil prices to steering systems and economic models ruling the internal dialogue. Likewise “Enabling of Leaders” refers to the ability and experience of leaders in terms of running participation-based change processes, and the necessity of developing these abilities and experiences in parallel and in congruence with the expected results.

Partly in retrospect, particularly two interconnected issues of relevance for all these four dimensions can be elicited as the experiential consequence of the overall analysis: First, the *diffusion*, or lack thereof, of organizational principles and the general ambition to develop all of the production units into organizations based on the principles of cross-functional and autonomous teams. And second, the *institutionalization* of development or intervention methods.

As discussed in part 4.2. (Experiential Consequences), the practical *diffusion* of the overall ambition to create changes in all of the production units was limited and subject to great variation between different parts of the system. *In general, the change process demanded a lot more time and resources than what was foreseen and predicted by the involved actors*: The pilot projects, even though they can be assessed as fairly successful as local projects, did not have the expected diffusion effect and did not work as role models spreading through the system. The resistance to change into models and organizational principles that were presumed attractive for

all parties was greater than expected. The political disputes between different trade unions, groups of employees, and local representatives increased despite a well-anchored agreement between the top management and the unions in advance. The experience and ability amongst the front line leaders to orchestrate a change process, demanding rather substantial changes both in terms of their own role as well as in the shape of substantial team and group development, was not as good and established as expected. The IT-support and control system (particularly SAP) supposed to be attuned towards helping the teams organize and continuously assess their balanced performance took a lot longer to implement than assumed. And after a while, the discourse of organizational change which was dominant for approximately two years into the process was challenged by other urgent discourses of great importance. For example, discourses connected to issues of tail phase status and the technological innovations of remote-controlled and unmanned production units, which contributed to a paradigmatic change in future expectations of how to run exploration and production. In addition, the general perspective of how to exploit the tail phase of the historically speaking most important areas evolved into one where the main concern was the development and exploration of new and large areas in the northern Norway and Barents region. In sum, even though the “depth of intention” with respect to fulfilling the process seemed to differ amongst the production units from the beginning, the great number of initiatives, projects, and development activities observed in the initial phase seemed to gradually fade away and not result in the anticipated and sustained effects of organizational change. As the initial projects were accomplished the developmental momentum seemed to decrease, and even those units who were examples of a rather great success had to continuously defend their stance and fight against the growing situation of a general withdrawal from the process.

The temporal and official estimates were 3-5 years for the changes to take their full effect, whereas the ruling expectations in the local units seemed to be that this would be achieved a lot sooner, and closer to within half a year (the point at which the first evaluation projects were initiated). Basically, the local logic of the production units seemed to be that the change had to be prepared by a separate project group and then implemented on a given date, and be fully functioning after a running-in period of approximately six months to a year. This constitutes a logic more fitted to and in

accordance with technology-oriented changes. These expectations were not met, and even the official estimates seemed to be too optimistic for this system.

Particularly one additional factor left out of the analysis is worth mentioning here: The offshore shift system literally more than trebles the time necessary to create changes due to the fact that the workforce is replaced every second week (as the offshore shift-schedule in general consists of two weeks of work and four weeks off), so every effort at training the employees as well as the leaders has to be multiplied at least by three (in reality the figure may be even higher, as the gains one can expect from a stable momentum of development are further hindered by the discontinuity of the workforce and their leaders in this setting).

All of these factors can be seen as examples of large-scale *Regression effects*, and regression effects possibly strengthened by the many *Single projects* preparing for the change and their basic logic of more technology-oriented projects, and their somewhat loose connection to the long term processes. In addition, both a diverse set of *Non-human actors* affecting or distracting the focus, as well as the gradually acknowledged fact that the presumed ability of leaders to run such processes was lacking, and that further *Enabling of Leaders* seemed necessary, fed into these regression effects. Taken together, such regression effects fit into a picture of unfulfilled expectations regarding the implementation of new organizational forms and principles. The problems of meeting these expectations are interpreted here as primarily being caused by the establishment of partially unrealistic expectations due to a general conceptualization of the process and the use of a type of language better suited for technological changes and implementations than to the design of social processes demanding tremendous maturation and mental change from all the involved. As such, the initial logic of project two as discussed above, namely seeing the change as a model to be implemented at a given point in time prepared through a single start-up project, seemed rather typical of the general rationality. And for most production units this logic was not as heavily challenged, directly or through interventions, as was the case for this project, where the efforts were partly re-defined, and attuned towards more gradual and long-term development of both leaders and operators. It is reasonable, then, to say that the initiatives in general seemed unable to sustain the development, to transcend the single development

projects, to overcome the regression effects, to handle non-human actors, or to enable the leaders sufficiently to keep the momentum of the process.

During the first two years, while working with project 2 (one of the pilots), it was possible from an early phase onwards to see the contours of these large-scale regression effects, and how they gradually evolved and partly affected the initial enthusiasm, spreading “a wait and see” attitude throughout the system. Moreover, the relative success of the two main projects in which the WRI project group was involved, as well as a growing cooperation with the department of internal consultants, put us in a position where we were able to contribute with ideas for further actions. The department of internal consultants was also involved in many of the other production units and observed the many unmet expectations at close range. In addition, they enjoyed a more direct relation to the top-management, and were also connected to the same department responsible for the leadership development programs. Combined with personal factors and relations (particularly the turbo drive of our project manager at the time) this in sum led to a position where the shared experiences inspired the development of additional activities which were more centralized and more *institutionalized*. One of these activities was specifically designed to meet the evolving regression effects in an early phase, or as early as possible, and in practical terms, it resulted in the integrated leadership development program later named Reflexive Machinery. The concept and project are examined and elaborated in detail in the next part; and to sum up, this development represented an institutionalization of the intervention method as it became a mandatory program for all leaders affected and persisted to exist for years – and is in fact still running in a somewhat different form. In addition, it was specifically designed to *enable leaders* to drive the changes by participatory means; to transcend the *single projects* in each production unit by creating more collective, cross-unit, and long-term forces; to handle and particularly to translate some of the internal *non-human actors* into forces supporting rather than distracting the process. Furthermore, through the applied pedagogical approach it focused on limiting the many possible regression effects of relevance for such programs. In short, it represented an attempt to institutionalize the developmental tools, so that the “soft core” elements of driving social processes – or facilitating and driving developmental oriented dialogues –

relate more directly to the “hard core” and institutionalized forces of a more material and technological nature.

The experiential consequences of each particular project, as well as general experiences and insights from the broader portfolio, helped us build experiential knowledge on interventions on several dimensions. For example, re-contracting projects based on weak premises contributed towards building stable relations, and the maturation of the role of the researcher, going from one-sided bottom-up processes toward a balanced role of external contribution and internal participation, as well as a gradually increased sensitivity and ability to form interventions targeted to deal with and balance the technology-oriented rationality, all lead to consequences gradually positioning the WRI project group as well as to the creation of useful and substantial insights of the system. The sum of projects and relations was in this way also of direct relevance for the establishment of the integrated leadership program, and the greater institutionalization of interventions designed to deal with the identified challenges.

4.5 Project four: Analysis of a Reflexive Machinery

After a period of approximately two years of actions on a corporate level with ambitions of introducing and applying the main principles of a team based organization (connected to the concept of BOI), a wide set of new and partly unexpected challenges were identified. The resistance to change grew, as well as the discussions of the overall ambition of creating a team-based organization grew steadily more politically entrenched. Particularly, the resistance experienced on the level of front line leaders was growing, and at the same time their crucial role in the processes was gradually becoming acknowledged and put at the top of the agenda. As introduced in the personal story of the introduction as well, a growing resistance from the operational level of front line leaders became gradually more influential in the process. Several reasons, ranging from an experience of being demoted and becoming superfluous within the new organizational model and difficulties in conceptualizing and seeing themselves in qualitatively different and new roles, to

shifts in long term established norms of identity and authority, as well as security issues and experiences of little involvement, all seemed to contribute to an increased resistance for a large part of this group. At the same time, a wide set of experiences identified the crucial role of front line leaders in orchestrating and fostering change in local units. Through pilot projects in single units particularly designed for a team-based organizational form (e.g. as described in Qvale, 2002), the many evaluations and facilitation projects accomplished throughout the system by the internal department of consultants at the time, experiences from the projects described above, and a wide set of conversations with employees, leaders and collaborators on all levels, the analysis indicated that an enabling of leaders and integrated leadership development efforts might improve this situation. As our project manager at the time (Øysten Fossen) had both a wide network of connection points in the system, as well as extensive experiences of leadership development, the overall situation put us in a position to co-design and apply a particular program targeted at some 300 of these leaders. This was done together with the department of internal consultants, a department responsible for the already ongoing leadership development programs of a more traditional kind and the main resources for facilitation of the overall change. This is part of the situation and challenges met at that point in time that represent the background for the particular project.

As such the project constitutes the main practical elements of integration between Leadership Development and Organizational Development. And as a concluding part of the project analysis it is connected to discussions considering a practical example of the integrative dimension of organizational and leadership development, as well as covering the main interventional themes of discussion. To sort out the discussion and analysis on the Reflexive Machinery as an Integrated Leadership Development Program, it can be useful to make a threefold distinction:

1. The first part is referred to as “Reflections in Action” and deals with analysis, reflections and activities connected to and important for the origin and start up of the particular Reflexive machinery, or in short, how to conceptualize and design a program that deals with the need to create improved understanding and ability to develop participation based processes. Following the rationale of the theory part as well as the previous analysis, the role of language is treated

as a means to integrating leadership- and organizational development, and is particularly discussed in this part.

2. The second part is referred to as “Reflections on Action” and deals with theoretical afterthoughts and analyses of the Reflexive machinery basically made in retrospect, or in short, how to conceptualize and frame development activities in terms of handling parallel rationalities in organizations more in general, and how to deal with the paradoxical dimensions of leadership and its role in democratic organizations.

The distinction is not absolute, as both parts are in fact written in retrospect and the distinction does not represent a clear cut between reflections in and on action. It mainly refers to some key reflections dominant while the project was under construction and in progress versus key reflections and theoretical considerations basically made in retrospect.

3. The third part is more directed towards an analysis of the key design elements and pedagogy of the Reflexive machinery. It basically deals with integration through institutionalization of leadership interventions in general and in particular reflections on effective design. This presentation of the Reflexive Machinery as a combined research and intervention method is considered to be more of the “take away” for the practice-oriented reader and is part of the concluding chapter (5.2).

As for the analysis of the previous projects, I will start with a short theoretical justification for why the focus in this main part is not constituted as some of its other possible alternatives:

1 *Relevance:* *Their ability to illuminate the overall research question:*

Almost needless to state, the Reflexive Machinery as a main project represents the very justification and work as a case at the core of the research question. It represents a practical attempt to accomplish the integration of leadership development and organizational development,

by the creation of an integrated leadership program – here labelled Reflexive Machinery.

- 2 Validity:** *Their generic relevance out of the particular project:* The elements extracted here, focusing on the language of change, paradoxes of leadership, parallel rationalities and systematization of reflections and feedback through institutionalization, aim to be analytical contributions relevant to change process in general.
- 3 Usefulness:** *That their analytic points contains clear consequences for activities and actions made:* The analytical point here, to rework conceptualizations of cross functional and autonomous teams, to overcome and transcend the technology-oriented discourse, puts forward some rather clear interventions when it comes to pedagogical principles and designs of actions.
- 4 Cyclic development:** The Reflexive Machinery is a result of reflections and experiences made in previous projects. Typically experiences are connected to the role of front-line leaders, the role of technologically dominant language and rationality, the role of the researcher, and (as illustrated in the previous summation) it is a general consequence of knowledge generated in earlier projects. As an institutionalized program, still running, it has also created consequences for further and later projects, not directly covered in the scope of this text.
- 5 Academic contribution:** *Their ability to connect to a theoretical debate in the field:* To see organizational development as language development also connects to a wide set of epistemological discourse, particularly the so called “linguistic turn” in action oriented research, and aims to give a practical example of a rather esoteric and otherwise theoretical debate. It also carves out some practical ways to integrate the strong personal experiences connected to traditional leadership development, to the more abstract and distant experiences often connected to organizational and large system knowledge.

6 Personal interest: *Intuitive energy and interest experienced by the researcher (me):* Working directly with the design and accomplishment of a field experiment the size of this Reflexive Machinery, being part of a group able to release the large amount of resources necessary to accomplish it, and the feeling of indirectly influencing a couple of hundred front-line leaders in a large system change process, inevitably generates a combined feeling of research privilege and overconfidence. This experience and its accompanied motivation resulting from being part of a large intervention is probably also the main motivation for my thesis.

Before I enter the three analytical parts I will offer some further considerations of what the concept of Reflexive Machinery is meant to cover.

What is Reflexive Machinery? – Continued.

In accordance with a pragmatic and semi-constructivist approach where constitutive concepts play a role of importance, the concept of Reflexive Machinery carries different labels connected to different discourses when appearing on different arenas. In this field of theoretical and academic discourses I have chosen to adopt the name of *Reflexive Machinery* to establish a connotation to both the reflexive practices baked into the methodology, and being at the core of organizational learning processes, as well as connotations toward the machine as an existence of a continuous stream of “inputs and outputs” governing any large system (as it was introduced to the discussions by Øystein Fossen in an early phase). And as pointed out in the introduction and the theoretical part, it is about handling different and partly oppositional dichotomies, e.g organizing and disorganizing, and consequently, the label contains both the emerging and open structures of reflections as well as the given and close structures of institutionalized “machinery”. Dealing with continuous streams of external and internal drivers is in this context linked to the “instalment” of

an intervention method, which is still (after four years) running as part of the overall developmental program, and thereby has a perpetual and machine-like existence as an intervention.

Whereas in the internal discourse of the system, the RM is a leadership program named *LUIS Drift*, where LUIS is the Norwegian abbreviation for Leadership Development In Statoil, and Drift refers to the practical and operational approach as well as the level of managers participating. It is one out of four leadership development programs in the system, the only one specifically created to support the overall change process, and in later years redesigned into a program to support organizational change and development in general.

And in the more professional and consultancy oriented field of leadership development and research on leadership, e.g. when presented in practitioner seminars and conferences for leadership development, the concept has also been presented as *Integrated Leadership Development*. “Integrated” refers in this sense to the tailor-made content dimensions that connects the program to particular organizational development challenges (as an opposition to “traditional” and *open* leadership training programs more oriented towards general leadership topics and most often personal and psychological development of the individual leader).

Different labels may pragmatically create transactional meanings and overcome some of the incommensurability between different discourses, rationalities, practical fields, language games, social systems, and the like. Within this pragmatically influenced epistemology, concepts and methodologies, such as RM, people, just as other actors, could be understood as actors with different roles when appearing in different discourses and on different stages. Most action oriented researchers will from time to time experience that a concept deriving from the language of the academic life world and professional discipline based discourses, often fail to penetrate and become meaningful (or constitutive) in other life worlds – or auto-poetic and semi-closed systems – *and vice versa*. This is the pragmatic reason for using different names in different discourses, and just as for the use of metaphors in general, they highlight different dimensions and topics that are hopefully able to create a sense communicable in that particular setting. And, within the present

epistemology, the probable penetration of relevant methodological discourses in action oriented research is what eventually (and hopefully) gives the RM concept meaning.

Further, and for this purpose, the Reflexive Machinery is treated as a hybrid concept and an integration of three general methodological levels. And if there is an ambition to simultaneously contribute to the field of practical organizational improvement, and to the academic field of theory development, the methodology has to be discussed as more than one thing, and it has to contribute within more than one system or field. This reasoning will be elaborated in the last part and I will start out with at least three parallel dimensions where RM is believed to contribute. The first two are the interventional dimensions connected to organizational and leadership development methodology – and represents its integration, and the third is a research methodology.

Organizational development methodology: The particular Reflexive Machinery is part of the overall strategy and efforts used to support larger change processes in the organization. It is an attempt to *systematize and institutionalize some collective reflection processes* in the organization by making front line leaders better able to drive participation and reflection based organizational change and development processes. One important aspect, then, is to create arenas where the never ending streams of organizational concepts and methods are handled, translated and systematically dealt with. This includes, e.g., to be able to meaningfully translate concepts into relevant contexts, accept or reject their relevance, share different experiences with their different applications, look for best practices, analyze what is old wine or what is new bottles, what is within the scope of continuous development and what is within the scope of more radical change, and eventually they include the collective design and accomplishment of participation based processes - and so on. Since organizational development has become a continuous challenge, both in theory and reality for most organizations, the appropriate methodology will have to deal with these continuous challenges continuously. This continuity and stability of change is the main motivation for constructing a reasoning connected to “installing a machinery” able to reflect more continuous challenges than single project interventions.

Leadership development methodology: The particular RM is a development methodology aiming to highlight and improve the leaders' Reflexive and practical abilities on development efforts when it comes to developing the individual leadership role by use of self-reflexive tools, when it comes to effective use of reflection guided actions in groups and teams, but also when it comes to development across the organization by the use of network based and collective reflections on mutual developmental challenges and best practice. As such the RM e.g. contains diverse methods for systematizing reflection, such as more traditional 360 degrees feedback tools for individual leaders, focus groups on one's own appearance, effects, and communicative practices, development of generic methods for organizational change, and sharing of experiences and practices when it comes to the orchestration of internal change processes.

Research methodology: As a pragmatic research methodology this approach is based on a general knowledge production epistemology, as outlined in the methodology part, where knowledge production is basically seen as systematic reflections on and in action. This applies both to a meta-design level, for the researcher and facilitators (which in this case are both internal consultants and researchers in the project group), and as a particular reflection on action processes for the participating leaders. The program and its facilitators have going through the same continuous reflection circles of development as a general ambition and design strategy, and represent an experience-based development as such. In addition, the participation gives the researcher (me) both direct and indirect access to the central discourses of the large system, it can help intervene and structure the collective experiences, and it contains a co-production of experience-based knowledge on the change processes. These are all familiar methodological elements within Action Research. At the same time, it builds on many of the principles found in AR methodologies where systematized and dialogue-based reflection processes in the "field" are the general source of pragmatic knowledge production. The basic logic and pedagogy in use, and way of application, is similar to many AR intervention methodologies with an extensive use and instalment of reflection in and on experience and cycles of action.

Content Elements

This particular RM originally consisted of three specific and overlapping modules running for about half a year each, and which all contained elements that supported the overall introduction of the mentioned organizational concepts⁷⁸. The program has been running for more than four years and has continuously gone through changes based on experiences made by “reflections” on changes in needs, actual accomplishment, and strategic signals from both the outside and other projects during the period. This applies to both the *content* elements and its pedagogical *form*, but some rather stable content elements of this RM will be introduced below, with a particular emphasis on the original design. The mere descriptions made here do not have as an ambition to directly connect to the reasoning of sustainable methods for interventions, but to indirectly connect through a glimpse into what were the main topics in this particular RM-case.

Module 1: Leadership and development of semi-autonomous teams

One of the main initial ambitions was to establish fewer hierarchical levels in the organization, generate a greater sense of responsibility on operational levels, and create more autonomous, cross functional and task dependent work groups. Hence, a less hierarchically based leadership and management approach is required. More responsible and autonomous teams have a tendency to create a different dynamic between management and workers, which is critical to master in order to realize the potential of this organizational form:

In this first module some of the related *examples* of main thematic areas are:

- The *historic origin* of the organizational concepts in use, its historical development, central experiences of possibilities and pitfalls, and conceptual distinctions between what is general principles – the species – and what is concrete organizational models – the particular example.

⁷⁸ A general description of the was formulated in Fossen et.al (2002), and has later gone through several changes as results of hundreds of hours spent in the facilitator group on evalutaions and development of the program.

- How to *develop* the leadership of autonomous teams. To go from a rather direct order-based way of management, and into the role of a team developer demands a challenging psychological change in the leadership role. Here, the reflections and analyses focused on how to get started, how to master the psychology of altering authorities, and the logic of continuous development vs. larger developmental steps.
- How to use “management by objectives” as developmental tools to support team reflections in their development processes. This includes the introduction of concepts such as “minimum critical specifications”, the logic of stepwise development of team responsibility and autonomy, how to “give away” responsibility, and how a guidance and control system of management by objectives eventually can be translated into a developmental system of participation based feedback.
- To better systematize and conceptualize the reflections made of teams’ and groups’ reactions and behaviours, elements from group psychology were also introduced, such as phases in team development, how to observe and effectively intervene in communication- and decision processes, the use of active listening, basic conflict management, the structure of difficult conversations, and general team coaching.

Module 2: Development of the individual leader, teams of leaders, and work teams

Basic understanding of and experience with teamwork and development is crucial for establishing more autonomous teams and for developing responsibility amongst team members. Themes connected to teambuilding and group processes, together with individual feedback serve as the frameworks of the second module. There is also a focus on the individual managers’ personal management profile. A tailor-made tool that gives a “360” degree feedback on a set of central dimensions and demands established for leaders in the company is used to structure these reflections. Learning groups are used to create collective reflections, work with and share experiences, and generate plans for the development of each individual’s strong and poor qualities.

Examples of some thematic areas in this module are:

- Further work on group processes and the analyses of developmental phases, mainly based on reflections on actions made previous to and in between the modules, and also reflections in action through the group and teamwork applied in the module.
- Creating effective and systematic reflections, communicating with teams, and a state of continuous leadership development; all these processes require good skills in both receiving and giving feedback. Basic feedback psychology and practical training was introduced, e.g. how to deal with defensive communication and the logic of experiential based observation and feedback processes.
- A substantial part of this module was also connected to feedback for the individual leader, established by individual and group reflections, structured and systematized around a tailor-made 360 degrees feedback tool. To integrate this with the specific organizational change, the topics particularly relevant for orchestrating the specific change were highlighted in the process.

Module 3: Integrated organizational development

The design of, and involvement in, large development processes in one's own unit is one key management challenge in advanced organizations. This also increases the demands upon the managers to work as "translators" and change agents through a large set of tools. They both have to handle the top-down and outside-in stream of new management concepts, company strategies, technologies, and conceptual models, and the bottom-up streams of input and feedback from the teams and employees. In short, they have to be able to produce organizational change in their own departments by (co-)translating the streams of concepts into local and meaningful organizational processes. This is also a field that requires the ability to organize systematic reflection processes.

Examples of some thematic areas in this module are:

- The conceptual logic of change, e.g. the different logic of implementation of models vs. development of process, the different logic of continuous

improvement vs. large step change processes, the different and parallel rationality of control mechanisms and developmental tools, and the conflicting rationality of preparing and planning in detail vs. engaging in more open processes.

- Introduction of generic analytical tools for organizational change. Focused on how to create substantial analyses, and preparing and planning for concrete changes.
- Organization and orchestration of participation-driven development processes, and the use and combination of expert concepts and local experience. As well as identification, construction and use of learning and best practice networks across the large system
- Practical use and application of databases such as work environment surveys, management by objectives data, feedback on leadership roles, as well as other data bases to drive change.

In sum, the particular RM intends to thematically integrate organizational development, team development, and individual development, basically by the systematic use of reflection based methodologies. The participating managers are recruited from a large set of different manufacturing units, and in general each manager is struggling with a lot of analogous developmental challenges in everyday operations. This situation is conducive to creating learning from “best practice” throughout the corporation, both during the days of the program, and through the establishment of more lasting collegial networks of leaders on the same level.

The content description made here is basically applied – or given its form - through the design principles described above, and thereby through a diverse set of practice activities, all structuring and highlighting different parts of reflections and in different ways. For instance, the modules are organized both as *plenary sessions* with collective reflections, thematic and conceptual introductions on common challenges, role-playing and acting, history writings, presentations of group and individual analysis; and partly as *group sessions* with more individual feedback, group reflections, skill training, group analyses, and “here and now” group process analyses, in addition to one-on-one conversations.

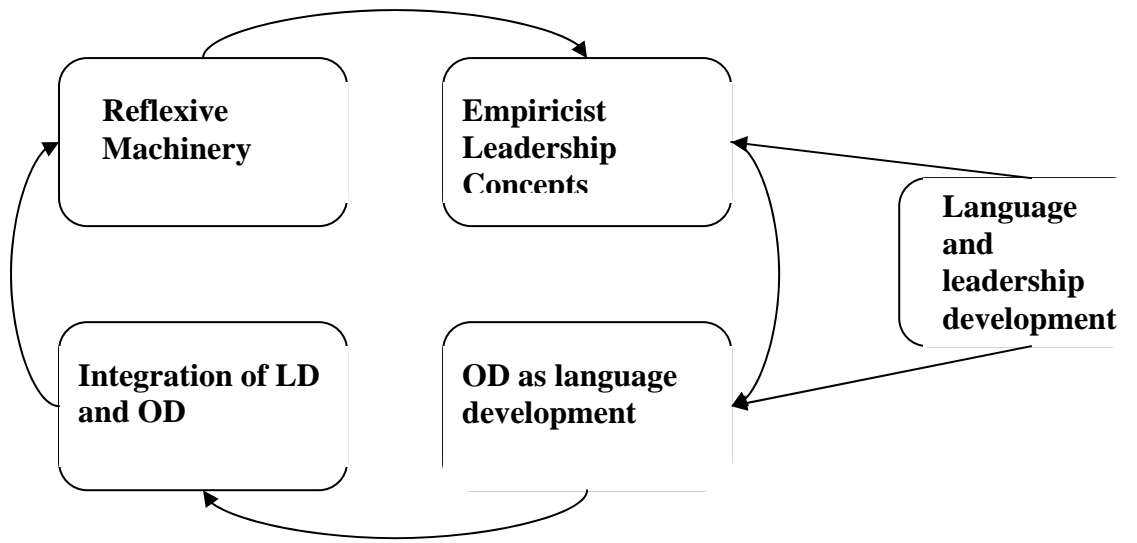
As a researcher, being a staff member in the process can also usefully be considered a congruent systematic process of experiential learning processes. As mentioned, the staff members continuously, both within the individual programs, and between programs, go through the same methodological approach to continuously improve both the program elements and the individual contributions, but with a slightly different set of activities. These include reflections on videos made of activities in the modules, giving and receiving performance feedback, systematizing and interpreting evaluations of modules, and so on. This introduces a possible congruence of form and content in the use of methods, an opportunity to use systematic reflections on action, experiential learning to develop the role consciousness of staff membership, and for me as a researcher it works as a arena to (co-)generate pragmatically oriented knowledge production. In this picture, and in my perspective, the congruence is what makes RM a possible and parallel method for both action research and practical development.

The role of the researcher, as it is identified and attempted to be established in the previous analysis, is further applied in this project, and in short it represents a combination of interventions through applied and researcher-based (constitutive) concepts, as well as more process-oriented facilitation. Both such reflections on the role of the researcher, as well as the key thematic substance, are further analysed below.

Reflections in Action – Language and Reflexive Machinery

The basic structure here follows the model of the previous analysis, which was legitimated in the methodology part, and contains the reflections on empiricist leadership concepts, seeing organizational and leadership development as language development, the further integration of leadership development and organizational development, and in relation to this, or as an actionable consequence, a further examination of the main logic of Reflective Machinery.

“Reflections in Action -Integrated Leadership Development”



Project #4	Key Observations	Key Analysis	Key Improvement	Key Actions	Experiential Consequences
<p>Reflexive Machinery</p> <p>This project deals with a large scale integration of leadership and organizational development through the design of a comprehensive program for all offshore leaders (Department leaders, and local Directors of each of the x production units in the system). The basic ambition was to contribute to the overall process of organizational development through a project tailor made for those responsible for the orchestration of it.</p>	<p>Empiricist leadership and team concepts:</p> <p>As also experienced in project 2 the overall system can be said to be ruled by a technological rationality. Cross functional teams and the according roles of leadership were discussed and treated as if they were constituted by traits similar to an indifferent object or a technological device. The social dimension of teams is enrolled in a discourse almost as if is about an empirical "it".</p>	<p>Organizational development as language development:</p> <p>Given that the language in use is empirically and technologically oriented, one has to build and contribute to develop a language able to conceptualize orchestration of social processes in order to foster organizational development as a social process,.</p>	<p>Organizational experience as Individual experience:</p> <p>For individual leadership development some of the main effects are reached when interventions effectively relate to personal experiences. Through a focus on language in use and language development it might be possible to relate organizational topics to experience through a similar set of means.</p>	<p>Reflexive Machinery as Language Developer:</p> <p>Through given examples of generic methods applied in the RM, the intervention in and through language is illustrated as a balance between "expert" and "process" consultancy. This balance can be guided through the concept of "fitted diverseness" which means both adjusting to the local language and expectations, and challenging these in a way that fosters development.</p>	<p>Parallel rationalities and interventions:</p> <p>The main experiential learning of this main project is two-fold: First, to acknowledge that parallel rationalities are a premise for democratic organizations and that interventions need to be designed to handle and develop them, and second that Reflexive Machineries need to be part of a wider network of coupled activities to effectively contribute to large systems change (Both consequences represent the main discussion of Part 4.6 and Part 5).</p>

Key observations: Empiricist Leadership and Team Concepts

As explored in the theory part (Part 2), a general conflict in the epistemology of social science circles around empiricist versus constructive perspectives. In other words, if the language of social science should be used to display, or merely refer to, social phenomena, versus be given a constitutive role in creating and generating social phenomena. Even though there are sound philosophical and practical reasons to consider the generative forces of language, and I argue for a general increased sensitivity for this dimension, I will also continue to apply a parallel strategy to acknowledge language as a descriptive and indifferent tool as well. Along with this reasoning, the distinction between generative and *constitutive* concepts versus indifferent and *descriptive* concepts was introduced in part two and applied in the previous analysis, and further constitutes a basis for the observations and analysis figuring in this part.

To build on the same line of reasoning; the decades of critique directed towards empiricism, and especially its branches of positivism, can be said to have contributed to an enormous (counter-)growth in socially constructive and symbolically oriented perspectives, and an accompanying sensitivity for the role of language. By large, there is reason to argue that this is a theoretical contribution not penetrating the general – or everyday - understanding of language, the “daily language” of everyday actions in Wittgenstein’s (1953, 1997) terms. In this picture, one basic empirical observation is that the daily language in use by both leaders and employees are characterized by a more empiricist understanding of language. Descriptions, analyses, and actions on change processes are normally formulated as if the language simply refers to objects and works as an indifferent tool. In the previous parts this phenomenon is referred to as a technological rationality, and this part is about some simple observations of some other effects of such an empiricist understanding of language: How it frames the discourses and actions of organizational development, how it further contributes to an identification of a dominant technological rationality, and how interventions can eventually lead to the integration of organizational development and leadership development through experientially based development of the language in use. The first step is to explore

some of the key observations made on the attempts to answer a rather empirically oriented question:

“What are cross-functional and autonomous work teams?”

One of the key observations made through participation in the change projects ahead of and during the accomplishment of the Reflexive Machinery was a particular question raised in a broad set of situations and arenas: *What are cross-functional and autonomous work teams?*

Both managers on- and offshore, the operators supposed to constitute and inhabit the teams, staff units, internal and external consultants, and we as researchers had a large variety of discourses about different versions of “What is **it** actually, essentially, and – in reality?” The premise for these discourses is characterized by some typical empiricist assumptions: Language can be used to describe what *it* actually is and uncover its real traits, *it* can be referred to as a noun and discussed based on the same logic as an object, and what we really need is a clear definition of *it*. Along with such a premise it resembles and has an analogue parallel in the theoretical analysis of “what is leadership?” in Part 2.

It is of course possible to create some general and indifferent characteristics on cross functional teams, but when it has to be contextualized and applied - made practical - the discussion becomes paradoxical and chaotic, and seemed, in this case, to end with ritual statements about more detailing, definitions, (or research) being needed before we could go further, or before we could “implement it”. One can say that the “analytical rationality” introduced in project three dominates such an “empiricist” oriented discourse. The practical questions of process design are made theoretical, as if it is possible to theoretically “write oneself out of the practical discussion” and make clear definitions from the practical paradoxes in the particular contexts.

In the different projects on different levels and locations I observed familiar resemblances in the way the question was answered. In particular, there were similarities in rationality and language in use as those found in the discussions on centralization versus decentralization above. Regardless of whether one had developed motivations to support the concept of change, or whether one was against

it, the “it” was to a large extent answered as if “it” was definable as a distinct “it”. In short, the idea of a cross-functional and autonomous work team was discussed as if it was an object – or an indifferent concept – in line with a positivist research approach. For the purpose of the later analysis, some typical and key examples of statements observed from those reluctant and those more enthusiastic about the change are presented below.

On the reluctant side, some typical statements were:

“It has been tried before in organization x and y, and it proved not to work well, they have later abandoned it as an organization strategy”.

“I have a friend working in one of these companies who have tried it, and they skipped it after a while. It became too time consuming and the primary tasks came out of focus”.

“It is inefficient, too much time and resources were lost on administration, meetings and group discussions, and we will lose control of direction”.

“It is a utopia; people really want to be given orders and not be burdened with the responsibility it demands”.

“We have seen it before; the employees will abuse the freedom it brings and make costly decisions”

“It will generate conflicts in the teams when difficult decisions have to be made on who is going to receive benefits like educational courses and overtime⁷⁹”

“Distributing the leadership tasks among operators creates a sour climate in the team, and fosters conflicts”

“In offshore installations there exists a long history of strong leadership due to heavy security reasons. The offshore installation is literally a huge bomb, and it is impossible to make a sudden shift in this culture of leadership responsibility. It puts to many demands on operators as well as leaders”.

⁷⁹ For most offshore workers overtime work make up a substantial part of the salary, and is considered an important reward.

While on the enthusiastic side, some typical statements were:

“The increased responsibility it brings will create more mature behaviours and a more meaningful working situation”

“Experience shows that it creates and fosters higher productivity, a better work environment, better learning conditions, and better...”

“At last the offshore culture of giving orders and treating operators as children will pass. It is way past due.”

“Tasks should be coordinated by those directly involved; it will result in better coordination and utilization of the resources”.

“When it is implemented, it will make front line leaders superfluous, and we will save a lot of resources“.

“The work process is not divided into professional departments; it will produce an organization more aligned with the actual tasks and processes of production”.

“It represents the future and will prepare the organization for the introduction of new technology and more knowledge demanding production processes”.

And so on...

These statements sum up some stereotypical examples of observations made in both the previous and recent projects dealing with this organizational shift in the system, and was found in most parts of the system at the time. As the observed quotes illustrate, the struggle to create a description of what it really is and what will be its effects was dominating both if one in general was positive about the conceptual change or if one was sceptical and negative about it.

The main point here, however, is to use the discourse as an illustration of the general observations made; that social phenomena, in this case the workings of teams, are enrolled in the daily discourse almost as if it concerned an empirical “it”. And naturally, from an empiricist perspective it seems reasonable to discuss teams as if they were objects with given traits. Normally, the action taken is – in line with an analytical rationality - to say that we need to know more about “it”, before we decide on the change. This is a conclusion that sometimes results in a project group trying to detail “it” in a theoretical report. It is also in line with the conclusion of many empiricist works in social science: “We need some more research before we can conclude”.

This strategy of dealing with change as going from one “it” to another definable “it”, is understandably effective action when dealing with technological development projects. For example when changing a turbine or conducting technological modifications on a platform it is often possible to calculate and specify in detail what the consequences are going to be before the implementation, and you will normally gain little from participating in the technology involved...

Key Analysis: Organizational Development as Language Development

As anticipated above, a way to analyze the observed conceptual framing is to go into the language game in use, look into its premise, and identify the traits from more classic empiricist perspectives. Part of the existing premise is to treat change processes as if they were about a linear shift from one model to another, from one thing to the next. Here this is illustrated as if the premise was to answer the question of “what are cross-functional and autonomous teams?” and whether this was a more or less fixed “it” that can and should be defined in detail and in advance, as is the case with a technology oriented and “analytical” rationality. Supposedly, to really know what it is, all you have to do is to reveal the nature of it, and define the concept, and if one considers the large amount of empirical research on variations of cross functional and autonomous teams, it seems almost like a tautological truth that well functioning teams of this kind are more effective and productive, create better work environments and well-being, foster more learning, and generate better knowledge production. Based on the empirical knowledge it can be tempting to make decisions to implement well functioning teams, which was largely the background for the case here.

When you have two fronts of motivations, those for and those against “it”, both looping into the in principal endless and regressive empiricist discourse of what “it” is, and both finding empirical support for “its” existence, a shift in the discourse seems to be a necessary strategy. *This is also what is meant by saying that organizational development is language development.* In this case it means intervening in a way that develops the discourse into a more practical way of organizing social processes, rather than regressively defining “its”, and contributing to the a gestalt-rationality shift from “structures” and “models” toward “processes”, or into the *parallels of analytical*

and accomplishment rationalities. A main point, then, is to organize discussions that transcend the dichotomy of “it is bad” or “it is good” by bringing in, or co-creating, a figure ground shift or third point. In this case it could be done by deciphering “cross functional and autonomous work teams” as a set of guiding principles, or minimum critical specifications, and show how their effects are a result of how these principles are practically organized as a social developmental process, rather than as a given thing or “it”.

For example, one such “minimum critical specification” could be concerning the “autonomous” dimension of the teams, and creating autonomous teams could refer to a process of developing a gradually increased team responsibility, rather than implementing a state of team being. And for instance, team development can accordingly be to gradually go from a responsibility of tasks that are simple and frequent with few relational and resource consequences – such as how to perform a well known daily based working process – towards more complex and rare tasks, and tasks with high relational and resource consequences such as creating budgets and distributing benefits. Most team tasks can be placed on such a continuum, and the consequence is not a question of whether autonomous teams are good or bad, but rather a question of how a well functioning practical process of such a building of responsibility is orchestrated.

What is meant by organizational development as language development, then, is to develop shifts and transcend the ways in which established language in use create developmental “lock-ins”, or in this case, by intervening in a discourse often characterized by empiricist and technology oriented metaphors, and develop it into a language more attuned to social processes and practical development. To see this shift as language development simply means to bring in and (co-)create language and concepts necessary to understand and handle of social processes – and to co-create and apply *constitutive concepts*, for example: conceptual tools necessary to observe, analyze and handle the phases of team development, changed power relations and the coordination of tasks, development of communication and decision-making patterns, changed professional identities and belonging, development of responsibilities and dependencies, and so on.

The potentially endless, purely theoretical, and often fruitless and energy consuming discourses of “what it really is”, and if “it” is good or if it is bad, should ideally be

changed into continuous learning process of practical improvement. And as an example it could include framing “cross-functional and autonomous teams” more characterized as a set of familiar resemblances that have to be practically developed, rather than as a fixed example of a species that is going to be implemented. One of our main backdrops for the Reflexive Machinery was based on these kinds of observations and analyses, and the RM was created in order to strengthen the tool base of front line leaders, mainly through the development of conceptual tools considered necessary to change language and discourses in the direction of the practical development of well functioning teams.

Key Improvements: Organizational Experience as Individual Experience

Another reason for conceptualizing organizational development as language development in this part is to further show how it may also enlighten the main discussion on the integration of individual and organizational developments. As in the example above, language development can be connected to the orchestration of change processes, and leadership development is connected to organizational development by the orchestration of processes. Consequently, for this part I will elaborate on the integration of individual leadership development and organizational development through the use of *a language development perspective*. This detour will be given before a more practical discussion on activities is elaborated in the next part (key actions).

One of the main challenges when trying to integrate individual (leadership-) development with organizational development is connected to problems of scale and scope. On the one hand, the leadership development programs attuned to individual development have a strong methodological connection to relational and emotional experiences, and intense work with increased self-insight and relational competency often seems to awaken the participants’ sense of real experiential learning. On the other hand, activities attuned to more abstract and non-personal themes of organizational development are often experienced as more “pinned on” and less directly connected to the sense of emotional experiences and high impact learning. Stereotypically, the division can be illustrated by envisioning a session where you get

intense and in-depth personal feedback on how your surroundings experience you as a leader and individual confrontations of one's own self-concept versus a more general lecture and discussion on organizational change.

This division in learning intensity is generally confirmed when one looks at the evaluations of traditional leadership programs, where the typical response is that one experiences strong effects and benefits from sessions covering the individual development, versus a lower score and response to sessions covering organizational issues (Strand et. al. 2002)⁸⁰. The same effect can be found when longitudinal evaluations are accomplished over a period of several years, even several decades, and the reports are normally that the best learning effects were connected to feedback on individual traits that affected you personally (ibid.).

The *key improvement* links to this challenge of integrating what seems to be rather intense and “hot” learning on the personal level, with more abstract and “cold” learning on the organizational level. I will argue that one possible way of partly transcending this gap is found through a focus on the language in use, and that an increased sensitivity on some “lock-in” effects of an empiricist language can play an important role in this integration, particularly, the “lock-in” effects created when one uses an abstract language, concepts and metaphors that for example are very technology- or economically oriented when trying to deal with “hot” social and organizational processes. In short, this implies an increase in the intensity of learning by going beyond the abstract and empiricist oriented language and toward a language applied to a conceptualization of social processes. This is not a simple or given strategy, and even though an individual focus generally gets high scores in leadership development programs, what is “hot” and “intense” for someone, is often not experienced that way for others. Said in a few words, many professionals seem to get turned on by their own professional field, and a discussion on e.g “turbine tuning” can be just as emotional as one about individual feedback, so it is more about the quality of the intervention than whether the rationality applied is of a technological or social kind.

⁸⁰ I have been fortunate to be able to explore these ideas both in informal conversations and more formal seminars with experienced consultants from the Norwegian Solstrand Programme, one of the longest running and most highly evaluated leadership programs in Norway. They particularly tend to get good evaluations on the personal and relational development, but struggle in creating the same experiences of intense learning on the topics covering organization and change.

A further reason for conceptualizing integration through a closer focus on *language in use* builds on the hypothesis that reflections on *language in use* give a more direct access to personal experiences and understanding, also when the substantial theme is of a more abstract organizational character. Given that the language in use reflects personal understandings and individual conceptualizations of experiences, interventions in the language in use carry the potential of making the collective individual and vice versa. For example, if someone uses a technical metaphor on a relational topic, it provides insights into how she tries to make sense of the topic, and normally also what she considers appropriate actions to deal with it. In a conflict handling project I had in a public department dealing with the infrastructure of pipes and drains, the experience was a rather humorous way of conceptualizing the lack of ability to properly handle the communication between office *planners* and operational *doers*: It was conceived as “a clog in the communication pipe”, and accordingly, the suggested solutions were variations of; “to flush out the clog”, and preferably by “high pressure”. Where the noun “clog” was referring to a person, the verb “flush” normally meant to get rid of her, and “high pressure” referred to quick and drastic actions. Through feedback mechanisms and systematic reflections on the use of language it was possible to directly challenge and explore the leaders’ understanding of the organizational phenomenon. In this case, for instance, by introducing more relationally and psychology oriented metaphors of individual attributions that contribute to creating the “clog”. Even though the language and metaphors in use normally are more subtle than in this example, studying the language in use can open for feedback on a personal level – how you conceptualize a topic – and open for systematic reflections on how your conceptualization governs your solutions and actions, and thereby integrate the more abstract topics of organizations with personal experiences. For example, the seducing effects of thinking in terms of metaphors like “making a short process”, “cut through”, “create a quick fix”, and “rip the band-aid off ” in social processes can lead to the paradox of even longer processes, the opposite of a quick fix, time consuming replays and backlashes, and often also increased resistance to further change. The metaphors, or personal language in use then, might point to solutions that are invalid for the situation, and could be the basis for collective or researcher driven interventions.

If so, the hypothesis is that knowledge production and learning on organizational topics can be closer integrated with personal experiences through reflections and interventions in language, and experiential learning on organizational topics can be closer integrated with individual development through similar means. The practical efforts of such integrations of course require design elements, methods, and a group of facilitators that are able to create systematic reflections and feedbacks on the language in use, both when it comes to individual, relational, and organizational topics. Examples of designs and methods with such ambitions are given in the part *Key activities* below, but first I will present some further reflections on practical issues on the role of the facilitator contributions.

Due to the assumed and rather closed system of leadership development (as elaborated in Part 2) and some of its practical divides from the field of organizational development, there is a reasonably equivalent “lock-in” of language in use when it comes to trained staff members, facilitators, consultants and researchers dealing with leadership development. As in any professional field there seems to be more and less ruling discourses with its standard approaches, attitudes, power relations, methods, techniques, identities and so on, corresponding with some main concepts, terms, metaphors and distinctions of the discourse – and here that involves the language and rationality used for trained facilitators. In sum, the dominant discourse eventually and potentially produces “lock-ins” just like do the given examples from a technology oriented language. These governing discourses can of course be more and less open systems and more and less dominant. (One possible way of checking for elements of governing discourses might be to try to formulate their opposites, and then judge if it would be possible to state them in public without massive rejection or attracting negative stigmas for braking norms. For instance, in the humanistic, appreciative and coaching-oriented field of leadership development of today, it would probably be impossible, and maybe professional suicide, to publish an academic article on: “*The Ultimate Benefits of Male Dominance and Learning Through Commands – The Fortune of Disciplining Followers Through Strong Leadership*”, even if it carried a close resemblance to actual leadership practices...)

Some of the potential “closeness” in the field of leadership development might be connected to a rather sophisticated and professional language in use when it comes

to individual and relational topics, and may be less so when it comes to more organizational topics. If one digs directly into the “consultant language” of leadership development one will easily find some dominant and governing discourses for example connected to the role of the staff member as expert vs. process consultant, what kind of pedagogical approach is normatively acceptable, how to handle group resistance and avoid conflicts, how to create effective feedback for participants, how to structure a seminar program, and so on (A discussion of such governing discourses in leadership development programs are elaborated in Rønning (2005)). As such, it is reasonable to assume that just as any professional group develops an internal and more or less closed lingo – language in use and applied rationality - over time, this also goes for the facilitators and researchers dealing with leadership development.

When dominated by a staff constituted of senior consultants and trained psychologists with long-term experience, there is no wonder that the governing discourse of professional leadership development normally shows a sophisticated and well elaborated language in use when it comes to personal and individual development. One hypothesis is that this well elaborated language in use, and of course its corresponding practice – which is after all what creates its meaning – is mirrored in the evaluations from participants when they report high learning outcomes on personal and relational dimensions. In short, the quality, quantity, forms and content of the internalized feedback and intervention language of professional leadership development seems to be sophisticated and able to hit an effective nerve in individual issues.

Being able to integrate such sophistication and accuracy in matters of organizational change the same way it is for the individual dimension, the language in use will have to be developed in a similarly sophisticated way, and be able to relate to the personal experience of the leader. In order to be able to facilitate feedback and systematic reflections on organizational topics in a way that builds on the participants’ own language in use, the development of a professional and conceptual repertoire seems necessary. Further, it becomes reasonable to assume that the language connected to organizational development would have to be just as sophisticated, and tuned in to give feedback on the limitations, scope, guiding of attention, and practical

consequences, for the terms, concepts, and metaphors applied by the participants. Then, to accomplish an integrated leadership development intervention, where the integration of organizational and individual developments is at the core, the language development aspect is not only of relevance for the thematic topics, but also for the professionals facilitating the interventions.

One simple example of a concept both representing a conceptual and professional language (co-)development for both the facilitator and the participants in the system might be drawn from an analysis made in Part 3 above, about the distinction between analytical rationality and accomplishment rationality: When dealing with a particular organizational development issue, where its challenges are presented as either difficulties in specifying and legitimating its effects in advance and in detail, or as difficulties in opening for involvement and participation because of a too detailed and specified plan, or as a struggle within this paradox, one can (co-)establish such concepts based on a particular analysis making it possible give feedback on the “lock in” effects of this language in use. This can be done, for instance by breaking the dichotomy of either-or discourse by developing such “third dimensions” or other kinds of metaphorical models. For example, some of the concepts of socio-technical theory can work well as tools for such language development, and for this particular case, the concept of Minimum Critical Specifications has contributed to breaking the paradoxical dichotomy in some instances. It also directly relates to the personal experience of leaders, for example, that are responsible for the decisions – and therefore want as many details as possible in advance, and that are responsible for the accomplishment and introduction as well – and therefore want to keep space for the necessary involvement, participation and ownership.

Aligned with the same reasoning, and as another *example*, one can connect the rationality and language in use in organizational change further with individual psychology and personal experiences by giving feedback on common and normal leadership projections towards employees. For instance, while working with groups of leaders, a common observation is a tendency to put on display a rather poor conceptualization and language-in-use connected to resistance to change and psychological defence dynamics. One example is an economical and technical over-rationalization, and a tendency to talk about what *they* – those in resistance – either

“shall” or “have to” understand what is at stake, rather than interpreting and analyzing the resistance and creating interventions dealing with the resistance. It seems to be even more so if the leadership actions necessarily are distinguished by emotionally difficult and stressful settings like downsizing, demotions, relocations, shifts in power relations, and the like. For most people, leaders alike, such situations evoke both external – organizational rational - and internal – psychological emotional – components. These double sets of components seem to be very difficult to separate and keep apart. When the projections towards employees, and what they “have to” and “shall” understand, become a major explanation and very one sided, it might correlate with the level of insecurity among the leaders. As such, both over-rationalization and projections towards employees in change processes can work as necessary anxiety reductions, and to give feedback or mirror such analyses of the internal projective components can work as another example of how the individual and the organization can be integrated through investigations and development of the language in use.

If so, a major practical challenge is not just designing a program based on the integration of individual and organizational issues, but training staff members that are actually able to facilitate the accomplishment of such efforts. In theory this means to open the partly closed system of leadership development, and bring in the (metaphorically) more open and often vague language of organizational development. Such integrations might then help to overcome the knowledge trap of closed systems, and bring the two closer to integration. From the experiences of the particular Reflexive Machinery applied, a great advantage of building such a development seemed to result from blending internal consultants and staff members with either specialized organizational development competence or leadership development experience and knowledge. This fuelled a continuous and necessary learning process, both in the phase of planning and designing, and even more so during the daily de-brief and learning sessions among staff members in the program. Hence, more than just the theoretical problem of design for integrating knowledge, there is also the practical challenge of opening the “closed system” of leadership development, integrate it with interventions in organizational development and create a long-term experiential learning process.

To sum up, in addition to the theoretical arguments stated in Part 2, a practical strategy for the integration goes through the focus of language as an inter-mediator and link for both organizational and individual experiences, and as a way of creating knowledge generation in the more professional fields of both leadership and organizational development. In the next part I will further explore how a Reflexive Machinery can support a perspective where leadership developments and organizational developments are integrated through components of language development.

Key Actions: Reflexive Machinery as Language Developer

A central premise for this discussion on integration of leadership development and organizational development is the fact that the contextualization and practical design of change also contains the component of language restructuring. This reasoning is exemplified in the previous project analysis and in this part some dimensions that show more of the practical sides of framing a Reflexive Machinery are underlined, not as details of the design, but as examples that attempt to offer some imaginative substance to what is further meant by language development activities in a Reflexive Machinery. The more generic design elements are elaborated in Part 6.

In order to be able to work with restructuring language, and develop a language attuned to handling the social processes of organizational change, one can for example structure different experiential learning sessions on organizational development around a focus on the metaphors, analogies, concepts and terms used and applied in the participant's own reflections. In a program designed to foster leadership development, a natural access to their language-in-use on organizational topics, and an according understanding of change, is given through work and discussions on struggles with actual change processes. A guiding principle for learning, then, as for this particular program, is that the more real the topic is, with its high stakes and closeness to the actual setting, the more personal involvement is engendered, and the more effective the potential learning process is.

While accomplishing the programs we experimented with a different set of tasks, and one example was to establish a rather generic tool given to help observe, analyze and plan the first steps in an organizational change process. The tool is a structure of seven steps which was used to systematize reflections on one's observations, analysis and primary actions taken. The seven steps are constituted by some simple questions (see table below), and the leaders' answers to the seven questions gave a rather direct insight into the language in use, and thereby a starting point for co-generative reflections on language and concepts, as well as more thematic and substantial challenges in the situation. The seven steps were basically formulated as in the table below, where I have also added a short comment to their main rationale⁸¹:

⁸¹ This is a translation of the last version of the table used, and as all other activities in the program it was subject to continuous changes and improvements. It started out as 9 points and their actual application varied from being an individual planning sheet, to a structure for presentations and discussions both in plenary settings and basis groups.

	<u>Example of form for a generic task used to structure discussions on observations, analyses and planning for change:</u>
Order	Question/Topic – with a short comment on the main rationale and some background experiences grounding the questions:
1	<p>What do you want to improve and why? Concretize what you want to achieve.</p> <ul style="list-style-type: none"> • This question was asked to help articulate the often implicit goals of change, and also to give directions and demarcations for the discussion of the next questions. It is also based on an experienced tendency to begin change processes with abstract, imprecise or different expectations on what to actually achieve.
2	<p>What kind of economical, legal, cultural, technological and organizational frames do you need to consider?</p> <ul style="list-style-type: none"> • This question is asked to basically systematize observations on how “institutional” frames of importance affect the planning of actions. It is also based on general observations of leaders initiating change later stopped or hindered by the lack of attention given to such institutional frames.
3	<p>How will the history of change in your department/area affect choices and opportunities in the change process?</p> <ul style="list-style-type: none"> • This question is asked to help analyze previous experiences of “learned helplessness” or successes and their effect on further change. It addresses the common need for taking the history of change into account, using previous experiences, and avoiding the tendency to walk into the same traps.

<p>4</p>	<p>What kind of forces work for or against the process and how do you plan to handle these?</p> <ul style="list-style-type: none"> • Persons, groups and units • Other ongoing processes and actions <p>This question is asked as a traditional “force field analysis”, where one estimates the forces related to issues of power, and identifies which forces are the most crucial for further actions. It is also intended to take parallel activities and initiatives into account, based on the observations that change initiatives sometimes lose their momentum due to other activities justified and considered as more important at the time.</p>
<p>5</p>	<p>Based on the analysis of the questions above, make a priority sketch of activities you will accomplish to achieve the improvements.</p> <ul style="list-style-type: none"> • This is to link actions and plans to the observations and analysis made above. It forces a translation from analysis into action and as such represents the fundamental quality check for the analysis. In an action oriented leadership environment, where the ethos of action-vigour seems to rule, the general experience is that more shallow and “trigger happy” everyday assumptions often offset actions, sometimes on behalf of more thorough observations and analyses.
<p>6</p>	<p>What is the first activity or step you will make? Plan in detail.</p> <ul style="list-style-type: none"> • This question is given to concretize the first steps to be taken. It is also based on a general tendency to postpone the more “painful” steps into actual actions when it comes to change processes. The task was also given as background for actions to go further in-between program modules. And this micro-planning attempted to lower the threshold and create

	commitment to actions in between program modules.
7	<p>How would you know or check when the goal is reached?</p> <ul style="list-style-type: none"> • This question loops back to the first step and is asked as a quality check for the goal by forcing it to be concrete and composed by identifiable improvements. It is also based on the general assumption in project theory that the more worked through the future result - as concrete and clearly formulated - the more likely it is to be realistic (or in terms of Shütz, 1974 – to create “futurum exactum”)

As illustrated in some of the comments, the background for this table, as well as each of the seven steps, was a result of experiences we as researchers made working the previous projects, a result of more intuitive logic, and a result of some essentials from organizational change theory and project development. The sheet itself is just one of many (approx. 30) examples of tools used during the program modules, and each step and its relation to organizational theory could have been discussed and explored more thoroughly. For the purpose of this part, however, – as one example of actions taken - I will focus the discussion of use and application, particularly on how the table constituted a background for indirectly working with language development on organizational change, and then finally contributing to the integration of leadership and organizational development. To get to the point it is necessary with a further roundabout on the role of facilitators and some pedagogical reflections:

The role of the facilitator in leadership development is often described within the constructed dichotomy of experts versus process consultancy (as elaborated by Schein, 1988). Where expert consultancy is stereotypically characterized by providing solutions for the participant’s problems, as a doctor to the patient, process consultancy is characterized by guiding or giving structure to the learning process where the actual solutions are created by the participants themselves. A distinction with a familiar similarity is discussed in project one, where it is argued that in the case

of conflicts, particularly, when the need to bring in elements that are not already part of the internal discourses and dynamics, the lock-ins and role of the researcher necessarily contain elements from both expert and process consultancy. The simple dichotomy of expert versus process consultancy can also be said to accommodate elements from the distinction between learning technical skills and dealing with material learning versus learning skills on how to deal with and orchestrate social processes. Within this logic, learning how to operate a new technological device for overlooking oil pressure, for instance, can to a larger extent be shown directly and explicitly by an expert, while learning how to master one's own tendency of creating a dependency among employees and limit participation through tacit controlling actions might call for more internal maturation on one's own behaviour, even though technical knowledge, and particularly experiential learning, needs elements of process consultancy as well, for example as master learning. As such, the language used to characterize learning might differ when it is attuned to learning explicit skills, rather than handling personal and social processes.

In such a perspective, development through learning is created within the field of tension between "telling how to do it" as an "expert" versus giving the opportunity or guidance to explore one's own experiences in order to create new insights. In this environment dominated by technical expertise and rationality the overall norm is that new knowledge is gained through bringing in experts, or attending a formalized and often certified course, even though the tacit knowledge of experienced professionals is highly valued. Added to this, the norm of expert teaching is probably strengthened by a long-standing school and study background where the traditional role of the schoolteacher has dominated, and where the role of the teacher was one connected to knowledge authority. All these kinds of experiences also contribute to creating a separate language for learning, as well as a language of expectations belonging to a leadership development program. Stereotypically, it contributed to an expectation toward training programs as a place where "we are to be given new insights from you – the experts". And even though the argument here is that some elements of an "expert" role is necessary, for successful process consultation as well, fulfilling such expectations can be reasoned as ineffective for a set of reasons:

Firstly, as discussed in part two on leadership theories, the expertise on leadership knowledge gives few such “expert” answers. Secondly, such expert teachings has been proven to be of little pedagogical value when experiential learning is to be achieved in areas of social processes, and where the “systematic reflections on one’s actions” are at the core. Thirdly and democratically, expert teaching is as a method not congruent for a development program where the goal is to be better able to facilitate and orchestrate participation-based change, which also means that an important leadership ability is to be able to convey and apply the role of a process consultant.

We are then left with a “therapeutic dilemma” (Schein, 1988): The therapeutic dilemma refers in psychology to the dilemma of knowing – through experience - what the patient should do to develop in the desired direction, and at the same time knowing that telling him what to do will not create the desired effect. When the actual realization and reorientation has to come from within the person to be sustainable and effective, in other words through participation and involvement, explicitly telling him what to do is believed to create a lesser effect than if he figures it out and realizes it through indirect guidance and direct participation.

Concluding and translating the concept for this setting, learning in general then means to develop the language of organizational change from a technological horizon of understanding, towards an understanding better fitted for social processes of change, or from structures and models to processes and development. The following assumption, then, is that being told to change one’s use of language to include more social process-oriented terms will have a more limited effect, than creating a setting where this acknowledgement is realized through structured experiential learning.

In line with this field of tension between “expert” consultancy on the one side, and more open and emergent processes, with little explicit added knowledge from the outside on the other side, one has to find a suitable balance. The purely open process with no significant outside intervention risks reproducing the already existing

discourse, relational patterns and language, just as the too structured and expert driven process risks de-connecting from real experiential and sustainable learning. As a way to overcome this dichotomy, the balance can be conceptualized, and we can start to give name to an imaginative suitable balance between these counterpoints, maybe as a third point, here baptized “*fitted diverseness*”. Fitted and diverse in the sense that the facilitation and interventions are not too similar to the expectations of bringing in the expert answer and its risk of superfluous learning, nor so open and unstructured that it risks not intervening in a way that brings in new elements of learning. In other words, *fitted diverseness* refers to being not too distant from the existing and local language games, rationality and language in use, while at the same time not being too close to the established language game and run the risk of not eventually being able to contribute to any development, or the ability of not transcending existing lock-ins⁸².

It is in this field of tension the seven step scheme above is created and exists as an intervention in line with this reasoning. As for the other tools applied, they are derived from attempts to be both fitted and diverse, and the previous experiences from the field has been applied to try to balance out such pedagogical considerations. As an example of a tool it is highly structured through separate steps and topics on the one side; it brings in “expert” dimensions from theories of organizational change, such as the importance of culture and history, it builds on experiences we as researchers have made in other settings, such as the existing language in use, it contains some basic process steps to be found in fields such as “Appreciative Inquiry” (Cooperrider et.al. 2000), Action Learning (e.g. Marquardt, 1999), and similar professional insights connected to learning. On the other side, and at the same time, it is basically formulated through rather open questions; it does not give any direct answers, which assures that the content of the answers are filled with the language, experience, and

⁸² It is not part of the discussion here, but I want to assure the reader that this stylized dichotomy of the role and action of a facilitator also contains a large set of moral questions one has to be aware of. For example, a well executed and participation-based learning process can inhibit a strong use of indirect power and hidden elements of manipulations, just as “expert” teaching can overlook the value of individual experiences and contribution. In line with the way the leadership role represents authority and executes power, the facilitator – as a sort of leader for this setting – also represents authority and executes power on the learning arena (see e.g. Rønning, 2005 for a more thorough discussion). And just as leadership inhabits dilemmas of the circular legitimization of power (see Part 2), these dilemmas are also highly relevant to consider, and inescapable, for the facilitation of learning processes. This is particularly so, as the line separating facilitation and manipulation may be very fine.

understanding of the participants. Consequently, it can represent an example of how to handle both dimensions, how they seem to constitute one another, and how both elements of expert knowledge and the co-creation of knowledge through participative processes are necessary. As such it also represents the overall approach gradually developed through the different projects, going from a more pure role of process consultancy, toward a balanced role with elements from the role of “expert” teaching as well.

In practice, the table was used to structure a process of four steps. First, it was used by the individual leaders as a basic structure for planning actions on a relevant topic of organizational improvement connected to new organizational principles. Secondly, their reflections on the seven steps were shared, discussed, given feedback on and analyzed in small groups (basis groups of six leaders). Thirdly, its first actions were tested as tasks or “homework” in-between program modules. Fourthly, these experiences were further presented in plenary sessions and discussed in the next module to create a collective feedback session with the ability to learn from and analyze each other’s actions. All these steps offered both direct insights into the language and rationality used to describe and analyse the situation in general, as well as establishing settings where both the facilitators and the rest of the participants gave feedback and intervened to help identify possible limitations and possibilities in the way challenges were conceptualized – or indirect interventions into the language and rationality in use.

The set of leaders attending the program represented a wide variety of experiences when it came to developing cross functional teams in their own organization. Some had long term experience with production platforms consisting of mainly cross functional teams of operators, while others had made some minor steps, and was struggling with basic start-up challenges of formulating roles and range of responsibility for team members, while others again had virtually no experience and struggled with identifying themselves as leaders no longer expected to be in the role of giving orders, but rather to be softly “coaching” autonomous teams – as it popularly was called. The differences gave a variety of different focus areas for further organizational development to be dealt with, as well as direct insight into the actual challenges. Again, the way the form was used to identify, observe, analyze, and plan

actions in one's organization, also gave the facilitators insight into what kinds of theoretical contributions could be useful in bringing the language of development further, whether it was to translate the language of "implementing" team responsibility to the process of gradually de-building leadership dependency, or whether it was to contribute to translating the language in the Balanced Scorecard from an instrument of leadership control to an instrument for team feedback and development, and similar "expert" topics of relevance for the change process. In sum, the combination of feedback from other leaders, and the possibility of bringing in organizational theories and partly "expert" concepts (such as the list from socio-technical theory above) set the premise for developing and giving a more common language and understanding to the highly social processes of organizational development into a team based organization⁸³.

This discussion and presentation of the use of one out of many examples of tools applied is of course overly simplified and maybe overly positive to the possibilities of training for language development. There are substantial limitations to both this example of an interventional tool and the others not discussed here, as well as the long term effects being close to impossible to measure in a quantified form in terms of actual contribution to the overall change. Except for high scores on evaluation sheets from the participants during and after the accomplishment of the program, it is difficult, and may be impossible, to give a clearer estimate on the effects. As for most leadership development efforts the evaluation, and the "return on the cost", is for the same reasons not estimated. Rather, the quality of the reasoning and development on pedagogical models, the restructuring and development of language and rationality, the integration of organizational topics into individual development, the combination of participants' experiences and external theories, and so on, all have to be evaluated. It is easy to become disillusioned in this lack of hard "evidence" and I will further consider some of the main counter arguments on the focus of interventions on language in use in the next part.

⁸³ If we go to other learning theories, this process of language development also has its analogue in the large theoretical field of knowledge production through the creation of a shared and explicit language for individual and tacit knowledge (e.g. as found in Krogh et.al. 2001)

An interesting, and also rewarding observation from the researcher's point of view, is to observe the tools in use, however, applied by the participants in other and later settings in the system. Tools specifically developed for this program turned out to be used both by groups of leaders and the environment of internal consultants in later projects and settings. For instance, the example of the form above seems to have become one of the many circulating concepts applied to foster change and improvement. Even though its circulation is not mapped it seems to represent a concept for interventional transformation with its own path of travel and existence.

To sum up, the *fitted diverseness* represents some of the main reasoning beyond "key actions" in this attempt to integrate leadership and organizational development through a framework connected to language development. This is a fitted diverseness where stakeholders bring in their language, rationality, experiences and metaphors on the situation – their observations and interpretations, and, at the same time, this is a setting where metaphors, models, language and conceptual apparatus, are used to structure co-reflections on language as an attempt to make the internal knowledge more actionable, or in this case, to introduce methods, metaphors, theories, and terms that help build a more process oriented language and a rationality more fitted for the orchestration of change.

Given the presented way of identifying obstacles for change through reflections on the use of language, parts of what we wanted to do can be summed up as bringing the mere theoretical debate of "what cross-functional and autonomous teams really are", into practical methods for organizing relevant developmental processes. To strengthen the leaders' individual roles as change agents by using the opportunity of the training program for further developing the language of change. The activities were accordingly directed towards a shift in the conceptual apparatus and use of language, from what was observed to be a highly technology oriented one, into a more process-oriented one through a co-reflection on future actions and past experiences. The term Reflexive Machinery thereby relates both to the "soft" elements of dialogue-based reflections, and the "hard" elements of instalment and part institutionalization of a program that in parallel introduces (and imposes) new conceptualizations.

Further Reflections

To frame the integration of leadership and organizational development in terms of language development, it will, as will any theoretically formulated strategy, highlight some aspects and hide or under-communicate others. The main reasons for using language development as an integrative framework when designing development arenas are theoretically presented in Part 2, and are more practically outlined above, while some of their shortcomings will be put on display here. Literally, there are important substantial shortcomings in reducing organizational and leadership development to language development (some of which are also dealt with in Part 2 under the discussion of limitations for social constructivism in leadership and organizational research). This is also the case when meaningful language development is directly connected to practical actions, is given meaning through actions, and should not be understood as something other than action.

The general logic is that when something is brought to the fore, other important dimensions are necessarily put to the back. In other words, when language becomes the figure, other forms of materiality literally becomes the ground. Just as a perspective dominated by an organizational understanding derived from reading Machiavelli probably would highlight the importance of conflict and power struggles in organizations; a perspective dominated by economical models tends to highlight elements of productivity and costs; a perspective based on democracy theory tends to highlight participation and open dialogues; a perspective based on juridical issues tends to highlight formal regulations and contracts, and so on. In a large system like this organization, each of these and many other language games or connected rationalities are naturally well represented both as separate discourses, empirical facts, and often also as organizational structures and departments. This simple observation asks for a perspective able to get across to and live with parallel rationalities and paradoxes, not as problems that need to be solved, but as practicalities necessary for democratic organizations. The point here is not to fall into the reductionism trap of these perspectives – or the language based perspectives - and claim a fulfilled or primary picture of the organization and its development, any more so than the others. And to refer back to the presentation of the ruling

epistemology in the introductory part: Even though it is a simple fact that language is one of the few human characteristics that is both culturally and historically universal – and thereby objectively present, it is also the main characteristic of cultural and historical differences.

The point here is to deal with the observations of lock-ins created by a technologically dominant rationality and language, how its language gives access to leaders' experiences, how it affects the accompanying actions of organizational change, and how language development in this picture can contribute to conceptualizing the integration of leadership development and organizational development on a practical level. A Reflexive Machinery then, as is exemplified here, can also be framed and – by language – conceptualized as a language developer, and a generic methodology for handling parallel rationalities existing in large organizations. The reasoning on parallel rationalities and their consequences for the integration of leadership development and democratic organizations is thus discussed further in the next part.

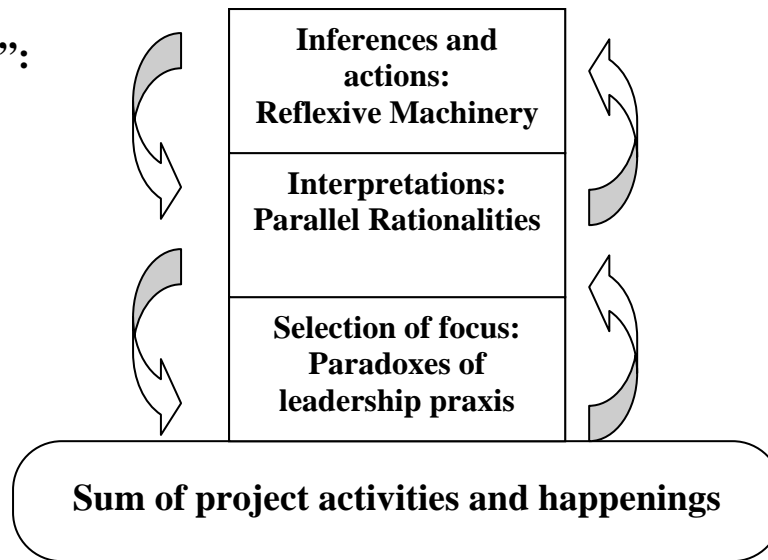
4.6 Speculations on Reflexive Machinery - Parallel Rationalities as a Premise for Democratic Organizations

This part deals basically with retrospective discussions on leadership and organizational theory and research, and its connection to Reflexive Machinery. These reflections are not to be understood as being built on empirical observations or reflective maturations through engagement in the case and in interventions, but rather as a continuation of the debates raised in Part 2 and through the analysis, particularly the handling of paradoxes of leadership research and knowledge. In addition, this part intends to contribute a *constitutive* interpretation, and give further language to the concept of parallel rationalities. In line with the previous reflections, I will basically dig deeper into the reasoning on how to deal with the integration of leadership development and organizational development, following the premise that leadership research gives few direct answers on what actually leadership is. A rather complex question will give structure to the main content of this elaboration:

How to integrate leadership development and organizational development when leadership research is unable to give applicable definitions and prescriptive knowledge on good leadership?

Part of the question is discussed above, where the focus on interventions through language and systematic reflections as experiential learning through language is sketched out as one possible approach. Here, the paradoxes in leadership praxis are further discussed and analysed in terms of parallel rationalities, the concept of parallel rationalities is elaborated, and this analysis is further seen in relation to the concept of Reflexive Machineries:

**”Structure
of
inference”:**



Paradoxes in Leadership Practices and Organizational Change

In a sense, the question and problem formulation, when it is formulated as above, can be said to contribute to representing part of the problem. The formulation of the question indirectly implies and presupposes that a definition of leadership – and eventually good or effective leadership – is necessary in order to achieve leadership development as well as knowledge generation on leadership. And as discussed in Part two, the question builds on one of the central assumptions for traditional leadership research, an assumption widely criticized today, but still present in the research. It thereby has a structural resemblance to the question of: “What are cross functional and autonomous teams?” as examined in the previous part. To further analyze this question formulation I will create a detour into some of the characteristics of the connection between leadership and organizational change for this case.

Considering change as the normal state of being for organizations seems to be a widely accepted perspective today, and this perspective also seems to influence

leadership research and theory. The outcome of leadership theories concerning change and development within concepts such as “transformational leadership”, “relational leadership”, “change- and knowledge management”, and the like also represents a shift in the attempt to create clear and finite descriptions of good leadership. One hypothesis is that the focus on more or less continuous change explicitly forces theories to reject the tendency of treating leadership as a causal, demarcated, stable and ultimately definable relation. As argued in Part two it seems to naturally follow that a (re-)search for the singular “holy grail” of leadership more clearly becomes a false path, particularly when the gestalt of change and development goes from being figure to become the ground. The point here is to start investigating the possible consequences for methods of integrated leadership development.

The focus on more or less continuous change also has its parallels in the way organizations are perceived and designed. For the purposes of this case it can be illustrated with the *observed* shift within this large system. As described above, some typical trends for the offshore organization was to partly abandon the traditional, established, and highly hierarchical way of organizing tasks. As a recall, the traditional organization in this system was based on distinct departments of disciplines, planning and coordination of tasks and disciplines through a hierarchy, and in general a concept of leadership as “coordinating nodes” in the hierarchical structure, giving orders to skilled workers. Rather well defined structures, routines, and responsibilities (and the lack thereof) were organized in a rather causal and bureaucratic model. Apparently it was a well defined model which also seemed to make it more suitable to think in terms of well defined leadership roles. On the other hand, the new – and presumably more change oriented organization – was conceptualized in terms of cross functional and autonomous teams with wide responsibilities for planning and coordinating tasks. In general, this shift follows the overall development of knowledge intensive production towards a flatter and less rigid organizational model and a higher demand for responsibility on lower levels.

And interestingly, the process of creating and developing more “autonomous teams” was widely expected to create a less leadership-dependent organization, and even expected to make parts of the leadership function superfluous. The observed effect,

however, seemed to be the opposite. The general observation was that the process of de-building formal structures produced an overload on leaders, and a general demand for more, although very different, leadership. Typical statements to be heard at the many internal seminars with operators, as well as extracted from the work environment analysis, were versions of *“we need more visible and clear leadership in this process”*, combined with formulations pointing toward requests for less direct leadership control, and to *“keep their hands off the operational plate”*⁸⁴. Leaders attending the program brought in a wide array of similar stories, often distinguished by a deep frustration: *“We are expected to keep our hands to our selves, and at the same time we experience vast demands to be more visible in the organization. The leadership role is castrated, and at the same time we are expected to achieve more”*.⁸⁵

One possible interpretation is that the traditional hierarchy with its rigid structures, procedures and routines contributes to partly substituting a need for transformational leadership. The more “causal” leadership role of giving orders within a rather rigid bureaucracy seemed in a way to demand less leadership than the transformational and relational role necessary to guide team development, improvements, and individual and professional maturation. Typically, the leadership process seemed to go from a state of causal relations, towards a more demanding constitutive and relational phenomenon. The flatter organizational structure, de-building hierarchical levels, seemed to open the field of leadership towards a function handling widespread dimensions of psychological processes, organizational values, cultural norms and shifts, and “governing mechanisms” more indirectly and transformationally than did traditional hierarchical lines. In other words, leadership became more indirect guiding for direction, than a direct guarantee for direction. As a perceived tendency, then, it looks like the flatter and more democratic organizations are even further away from the possibilities of “automatization” in leadership than the more traditional bureaucratic model, and instead ask for a very different conceptualization

⁸⁴ The request for more visible leadership and less controlling and directing leadership at the same time has appeared in a large set of work environment analyses I have seen both in this organization and others. Immediately it appears as a paradox, and after closer interpretation, one analysis seems to point towards a general request and need for feedback and a need to know that leaders clearly show they “see my contribution”. This is particularly true in organizations with knowledge-based production and few formal structures.

⁸⁵ In the program these and other statements were of course subject to thorough discussions and analysis, especially connected to social psychological dynamics of change in authority and dependency. Such and other analyses are not elaborated for the purposes of this part.

of leadership. And the concept of “autonomous teams” might be seductive in the way that it tends to create fantasies and illusions of superfluous leadership⁸⁶, even though the opposite seems to be the case. This is of course not an argument against the development or the general trend towards more team-based organizations, or against the more autonomous role and cross functional composition of teams, which is a development that could rather reasonably be considered inevitable as the production tasks in general become more complex, the professional specialization is more detailed, and the demands for democratic and participation based organizations increase.

At the time it was tempting to analyze this observed demand for more leadership as a temporary local state that would pass as the new organizational principles became more stable and mature. But later dives into the literature of leadership show that the opposite often seems to be the case, and that a demand for more leadership is rather the norm within these overall organizational trends. It is also reported in general that a dramatically increased proportion of the employees report to have some kind of leadership role. For example Sørhaug (2004) analyzes this phenomenon further, and describes it as a general tendency in today’s organizations to create overproduction in leadership. By overproduction he simply refers to the tendency that leadership, to a large extent, has become a substitute for structure in modern organizations. When the working life in general is characterized by continuous change and transformation, it becomes a continuous demand for leadership that functions as a substitute for a stable structure. The result is a general revaluation of leadership as a resource and solution, exaggerated attributions directed towards leaders, and unrealistic expectations for leaders. He further argues that the general expectations towards leaders as driving continuous change are doomed to fail when leadership becomes the ability to drive change, and the imperative for change eventually becomes a goal for and in itself.

The short detour connected to changes in organizational structures observed in this particular organization, and maybe also as a general trend, can also be used to

⁸⁶ If so, this is in line with the analysis of Herbst (1976) presented in Part two, where he addresses the lack of focus in middle managers when one tried to establish autonomous teams in the Norwegian “cooperation experiments” in the 1960s.

illustrate that the shift in leadership theories are closely connected to and integrated with organizational theory. As discussed in Part two, there seems to be a tendency to shift the focus from organizational structures towards an increased focus on relational aspects such as the organizational culture, and values as the organizational trend moves toward ideas of continuous development and change. It is difficult to speculate on the general validity and diffusion of such tendencies and trends, but they were clear indicators that this kind of shift was present in the system at hand, and that the research literature seems to mirror it. In such a picture the large family of theories connected to transformative leadership, is farther away from the more traditional reductionism trap of presenting “the new best solution”, at least as a one-dimensional and authoritative definition of leadership. When change becomes the overall imperative and leadership theories focus on transformation, it seems to more naturally incorporate that the theories themselves have to represent a more flexible repertoire as well. This adds to one of the conclusions in Part two; leadership is inevitably residing in and dealing with a large set of paradoxical dimensions, and this anti-definition of leadership seems to be even more contextually suitable when change becomes the core of leadership.

And to sum up so far, the picture and observation given above indicates that the premise for the question raised above – the need for definitions – is even more difficult given a shift toward an even more diffuse and open understanding of leadership following the trend toward more flexible and less hierarchical organizational structures. If traditional stepwise organizational change is substituted with organizations more attuned to continuous change, as is one point for the creation of cross functional teams, it is reasonable to believe that the ability to handle and master an even more paradoxical leadership role is required. If so, the integration of leadership development and organizational development asks for means able to develop the ability of mastering and developing within paradoxes. This again requires a conceptual apparatus and language for leadership tuned to deal with paradoxes. In the next two parts I will explore the concept of parallel rationalities and their role in the integration of leadership- and organizational development, and further discuss how the Reflexive Machinery eventually may become one of a set of tools to deal with the development of a language better able to handle such paradoxes.

Parallel Rationalities and Democratic Organizations

This part further examines what is meant by parallel rationalities within this context, and how it might be used to conceptualize and practically understand leadership paradoxes. Related to the question raised, I will present Parallel Rationalities as a way to help overcome the apparent impossibility of dealing with integrated leadership development when sound and valid definitions of (good) leadership are not established. To do that, Parallel Rationalities will be applied as a philosophical meta-concept attempting to transcend the immanent logical inconsistency of accepting paradoxes. Instead of a definition they will be characterized by some of their family similarities, and by some examples from the analysis given in the previous part. The theoretical connotations and family similarities typically links to similar concepts of rationalities, such as language games (Wittgenstein, 1953; 1997), interpretational horizons (Gadamer, 1960; 2004), paradigms (Kuhn, 1962; 1996), discourses (Habermas, 1996), auto-poetic systems (Luhman, 2003), and the like. All these philosophical concepts inherit and are used to highlight separate philosophical themes, but at the same time they inherit some important similarities that can be used to understand their more practical and empirical counterparts. For the purpose of organizational understanding, empirical expressions of Parallel Rationalities can be exemplified through the analysis, where a distinction between a technological-oriented rationality and rationality attuned to catching social processes is applied (or constituted). In principle it is possible to sketch out a close to infinite number of sets of parallel rationalities, but for the purpose of integration between leadership development and organizational development I will limit the examples to the stereotypical rationalities of technological rationality and the rationality of social processes. In addition to these, one could apply some other typical examples as “economical rationalities” – the rationality of economical models and its presumptions of economical behaviour, “legal rationalities” – the rationality of regulating behaviour and organizational relations through contracts, HSE rationalities – the rationality of “safety first” and an ever-present focus on safety issues. Just as in the dichotomy illustrated above between technological and social rationality, they all inherit more and less their own criteria and rules for knowledge generations, relate to separate

professions, different ways of learning, different language structures, and different validity and reliability criteria, and as concepts they are often connected to different traditions, sets of values, professional identities, cultural norms, and so on. And just as technological metaphors influence and constitute the way social processes are perceived and dealt with, different rationalities can be said to have mutual constitutive effects on each other. It follows from the definitions here that different professional groups, as well as departments and hierarchical levels produce and operate in partly parallel rationalities.

The reasons for applying the label “Parallel” are connected to epistemological reasoning on the impossibility of reducing leadership to deal with just one rationality or dimension. More importantly - and empirically – however, it is possible to argue both the mutual constitutional effects in-between rationalities, and that the domination of one corrupts and destructs the others, as well as corrupting the functioning of the organization as a whole. For example, a dominant technological rationality can ruin organizational development, just as well as a dominant rationality of social processes can ruin the stratification of a technology dependent production process. Both the gestalt shift of focus from a focus on “structure” towards a focus on “process” in dealing with change processes, and the parallel and paradoxical rationalisation of “centralization” and “decentralization” of functions, can be said to further illustrate this point as they are examples used in the previous analysis.

Another example of the paradoxical nature of rationalities where one became dominant and was in danger of “corrupting” the others was observed during the introduction – or rather implementation – of an advanced IT system for “management by objectives”⁸⁷ (this example builds further on an example introduced by Fossen & Karlsen (2003)). As a software system it is clearly rooted in a tradition of enforced management control, and that control in terms of measurement is the basic ground for effective management of organizations. Within an economic rationality, and the most commonly applied economic models, being able to measure inputs and outputs to guide change makes perfect sense. It represents an almost Tayloristic understanding of organizational efficiency, and the quantitative focus makes the

⁸⁷ As part of a thorough implementation of the IT based SAP system in the organization, a general system for Balanced Scorecards was also implemented on all levels and in all departments in the organization.

employee become a metaphor for rational actors in the market of “lead” and “lag” performance indicators. In a company with more than 17,000 employees it is of course necessary to create an overview and measure efficiency on a wide set of indicators, and software tools, such as SAP, variations of “management by objective” and a Balanced Scorecard probably represent some of the best tools to ensure this today. At the same time – and in parallel – an excessive and one sided focus on management and control systems often result in inefficient bureaucracy. It can corrupt and disrupt the effects it is meant to enhance. For example, the result might be a growth of “subversive creativity” where results are manipulated or goal displacements where the system of measured indicators get more attention than real results, and the intended effect thus becomes absent. The rationality of management and control systems also seems to clash with the logic of social systems on the negative experiences of surveillance, directions from “above”, distrust, and a lack of participation and ownership in the results.

In any organization designed to solve specific goals, which is a traditional definition of organizations and therefore basically applies to all organizations, the opposite of detailed control can also represent a corruption of the organization. A one-sided focus on participation and ownership, and an attempt to create democratic dialogues to solve any question and decision, is also in danger of corrupting organizations by destroying direction. For instance, an experience of a lack of sufficient participation or co-determination can be observed to become a ruling cause to not make decisions – or to create change. In organizations of this size in particular, it is possible to imagine the destructive difficulties resulting in processes of excessive and potentially indefinite participation based discussions.

As a simple example, the distinction above might illustrate that organizations normally have to be governed by different sets of parallel rationalities, and that when one becomes too dominant and controlling, it is in danger of corrupting the others, as well as the system as a whole. To deal with different rationalities then, naturally, and by its meta-definition, is to deal with paradoxes, not in the traditional sense that paradoxes are to be solved, but in the sense that paradoxes are necessary components of a well functioning and democratic organization.

Related to the example, the idea behind Balanced Scorecard as a concept is to balance different logics, or fields of measurement, and can be said to be invented to moderate the corruptive effect of a unilateral economic focus. But just as it is difficult to conceive “cross functional teams” as an empirical item, or a given “it”, tools such as Balanced Scorecards do not have an effect in and by themselves, but are dependent on how they are used, introduced, applied, and followed up. They can even be applied as distinctive tools for participation when feedback is applied on the right level. They are tools that live within the paradoxes of different rationalities, and the next part is about the use of Reflexive Machineries to give constitutive language to and translate in-between these rationalities. In line with these arguments, I will further argue that the integration of leadership- and organizational development, when neither a definition of leadership nor a rationality of organizations can be established as a foundation, can be built on a conceptualization and a language of parallel rationalities.

Reflexive Machineries and the Mastering of Paradoxes

In order to foster the ability to master and live in the paradoxes of parallel rationalities, it can be argued in line with the analysis throughout Part 4 that the development of a conceptual apparatus and language is one way of systematizing reflections on the necessary paradoxes and different rationalities. To practically illustrate this debate, I will start with some glimpses on how we tried to establish some simple tasks and tools to structure and systematize co-reflections on some of the typical discussions raised by the leaders in this change process.

For example, the perspective of Balanced Scorecard was among the leaders conceptualized as it typically is within an economic rationality, and hence they perceived it basically as a management and control system. Some of their reported challenges with the implementation were to break its categories down from department level to a meaningful team level, and particularly to get the teams to spend sufficient resources on the input of data. The social systems in the teams seemed to be resistant, and typically perceived the instrument as another bureaucratic burden stealing time and resources from “what we are actually here to do”.

Part of the dilemma, then, was to translate the “bureaucratic burden” of another reporting system, into something meaningful and useful for the teams – which it was also intended to be, or in the words used here, to reflect upon how the rationality of such management systems at the same time – in parallel - can be beneficial for the development of autonomous teams. In the discourses and reflections on these issues it was soon discovered that the control aspect just as well could be translated to part of the team’s self control, and thereby used to enhance and develop both the autonomous dimension of the teams and the cross functional dimension. For teams to be able to display and co-reflect on results from their joint efforts in a systematic way is basically what team learning and development is all about. These reflection exercises then seemed to open the insights to a parallel understanding of applying the *management by objective system* of Balanced Scorecard as a participation-based team development tool⁸⁸. For the leaders the task was then redefined from struggling to make the teams spend sufficient time on “our” – the leaders – control system to developing it as the teams’ own tools to structure co-reflections on joint efforts. The economic rationality of management by objectives and balanced scorecard then entered the different and parallel rationality of orchestrating team development as a social process. This again opened for planning and acting on how the teams should *participate* to make it a meaningful *feedback system* in their own areas of expertise, and how they could develop it into a tool for structured reflections on team work and as a tool for better developing and coordinating the use of different functions in the teams. This translation into a different rationality ideally became something else than to keep on struggling with forcing another “top-down” and time consuming bureaucratic system on the teams⁸⁹. It might also work as another example of how it might be possible to transcend the traditional organizational and empirical discussions on “what *something* really is” and instead move towards discussing its use, and that the use of organizational concepts, as well as rationalities, can exist as parallels and within paradoxical structures.

⁸⁸ The actual exercises were designed in line with the overall pedagogy, similar to the other thematic issues applied as different structured discussions in basis groups as well as in plenary presentations and practical exercises.

⁸⁹ With few exceptions I only have access to the reported effects in the program, and am not able to judge or validate the actual effect in the teams, or if they actually were helpful, except from what the leaders reported back on their experiences with the application as a tool for team development.

In Part 4.3 I refer to the “centralization of functions” as another general tendency in the company at the time, and the point in that part is similarly a way of transcending and accepting different rationalities as basic for organizational topics: The belief that synergies are created when you pool resources on a more aggregated level is at the same time both true and untrue. The parallel axes and rationalities of centralization and decentralization both continuously oscillate, and consist of a permanent mutual constitution process. As Mintzberg (1983) argues, both the end state of centralization and decentralization of functions in organizations tend to produce arguments for the other end state. One example is that on the one side it is true that centralization produces a sounder basis for priorities and the allocation of resources, a broader and more complete grouping of disciplines, and a more systematic and complete cycle of reflections and actions. On the other side, however, it produces an increased need for bureaucratization, a long “distance” between local knowledge and general knowledge, and a strong and potentially unproductive distinction between reflections and actions.

Both examples above give a small glimpse into some of the many parallel rationalities governing particularly large organizations, and the point here is to relate them to the integration of leadership- and organizational development and show that in opposition to the intuitive and often controlling one-dimensional rationality, the integration is neither based on the definition of (good) leadership, nor on what an organizational concept really is, but rather the opposite: the principal impossibility – and potential destructivity – of reducing leadership and organizational concepts to one-dimensional things, definitions of metaphors. The integration is then based on the possibility of mastering paradoxes by the use of parallel rationalities and balanced regimes of knowledge production. If so, organizations need arenas able to translate different concepts from different rationalities into actionable knowledge, and the concept of Reflexive Machinery is here delineated as one possible arena where the continuous demand for change and its belonging fashion and fads (such as BSC), are translated into actionable knowledge through systematic reflections in a more democratic manner.

Further Reflections: Parallel Rationalities and Democratic Organizations

My first experiences with parallel rationalities and organizations were connected to conflict handling and the observation and analysis of parallel rationalities as a conceptual source for conflicts (see Winther 2000). In the sense that different perspectives and understandings are the principal foundation of conflicting views and interests, and that accepting differences or achieving agreement on important disagreements, the concept is often a more sustainable and productive way of handling conflicts than the creation of a common consensus. Finding ways of mastering different rationalities is almost by definition more effective, when different rationalities are necessary parts of well functioning organizations. Throughout the many projects in this large system, these initial understandings have been greatly matured.

Recently, I have also found a particularly interesting analysis in Sørhaug (2004), where he builds on Weber's archetypal way of legitimizing authority, and indirectly transforms it into a trinity of mixed knowledge regimes⁹⁰. A knowledge regime is here specific connections between organization and knowledge and power and legitimacy, and refers to idealized principles and rationalities of organizing. These organizing principles are given a three-part structure and given the labels *collegia*, *hierarchy*, and *network*. The first of the three idealized and stereotypical knowledge regimes is labelled **collegiums**, and refers to knowledge regimes based on balanced relationships. Collegiums are based on participation, dialogue, and the ultimate objective is truth and the testing of hypotheses. The continuous process of dialogue towards truth is further sketched out as an eternal interaction between consensus and conflict, and between hypothesis and criticism. Collegiums are ideally driven by falsification (like in Popper, 1959; 2002), and continuous criticism is the typical driving force. Ideally, the best arguments are supposed to rule and truth is not decided, but discussed. It is easy to see that the academic ideal and search for truth is idealized as collegiums in this sense. The second idealized knowledge regime is **hierarchy** as the organizational structure, or a line of unequal positions that manage a set of objects, values, and rules. The hierarchical line is driven by instructions and its

⁹⁰ The concept of "Knowledge Regimes" in Sørhaugs text contains much of the same meaning as the use of parallel rationalities in this text and will be dealt with mainly as interchangeable concepts for the purpose here.

objective is ultimately order and maintenance of productive directions, based on beliefs rather than principles of truth. Instead of being structured by hypothesis, this form of knowledge regime is structured around dogmas, as ideas that are to be implemented. The main point of the hierarchical line is further to create a state of deliverance – lead to completion, rather than an eternal process of critique. Its logic is un-democratic, and the authority comes from above as an ultimately self-legitimized force. The leadership line is a natural example of this knowledge regime. The third idealized knowledge regime is the **network** as a pattern of social interaction and meetings in a group of people. The network creates balances between alliances and is based on reciprocal exchange. Rumours and connections are the source of knowledge, and knowledge has a social function for exchange rather than securing truth or direction. The “network” is then the personal relations used to “make things happen”, or the necessary practical and often personal alliances for new initiatives. The mafia is the ultimate network structure, and just like the hierarchy it has a huge potential of creating ethical corruption and anti-democratic relations if it becomes a dominant regime.

In line with this reasoning the three knowledge regimes can be conceived as parallel rationalities, with a clear tendency to corrupt each other in organizations where one is awarded the primary status, or becomes too dominant as a rationality compared to the others, and is given attention at the expense of the others. In sum, *collegiums* as knowledge producers are the organizational principles and praxis that create the fertile ground for transcendence and new knowledge; the *hierarchical* line creates order and directions; and the *network* creates actionable alliances. Their scope is too broad to give the whole reasoning here (Sørhaug 2004 examines their relation through historical examples), but the main point is their analogy to parallel rationality as mutually dependent and potentially destructive if one dominates, and that balancing the knowledge regimes represents parallel organizing principles for well functioning democratic organizations.

As such, they can also be used as idealized forms of design criteria for the development of modern democratic organizations, and as principles for mastering not to be corrupted by one rationality at the cost of the others. A well designed interaction between the parallel regimes can be built into the organization as values, visions,

norms and rules, as well as in concrete development arenas. The reflexive and open space of the collegiums can be balanced upon the decision space of the hierarchical line, as well as the alliances and networks of co-workers. *The challenge of democratic organizations, then, becomes to design the shortest line possible that protects and secures direction without choking collegial creativity, and which exploits the flexibility of the network without falling into the traps of fractions of informal processes (ibid).*

In this perspective, well functioning democratic organizations are able to give a structure to these or similar parallel rationalities, and create balance of paradoxes by understanding the ultimate undemocratic corruption resulting from a dominant rationality, one-dimensionality, or overruling knowledge producing regimes. In danger of putting too much into and overloading the concept of Reflexive Machinery, I will give a short reasoning for how it might be designed and used to develop a balance of the paradoxes of the trinity of these knowledge regimes as well, and how it in principle can represent the trinity of regimes (even though this trinity was not an explicit strategy in the initial design).

The hierarchical line is represented and developed in the sense that it is designed as a development program for leaders, which represents the line and has the authority to make decisions and secure direction. The network is in its original form nurtured and developed amongst the participating leaders, both as a normal social process of spending time together and sharing experiences, and as a follow up structure after the program. But most important, the collegiums are nurtured indirectly by the focus on the leaders' abilities to drive change through participation – by creating collegiums, and directly as the RM in itself is an open, reflexive and “free space”. The three knowledge regimes are not dealt with explicitly in this program, but in retrospect it contains elements of all three. For further development of the concept of Reflexive Machinery it would be natural to elaborate on this analysis, see how it could be put into the design more explicitly, and apply it to ensure a democratic development of organizations. This includes elaborating on the conceptual divide between technological and social rationality in particular, and translating it into a more complex threefold model inheriting the necessary balance of regimes. Authority is in this analysis conceived as a self legitimizing entity; it is in constant risk of corrupting the

democratic dimension of any organization, and thus one has to create reflexive arenas that help to not become one-dimensionally in favour of one regime.

To sum up, one can conclude that there are enough historical examples of the tendency for leaders to create self-fulfilling and self-strengthening spirals of corruptive and destructive regimes, and institutionalizing structures and arenas for training and dealing with paradoxes might help reduce this risk, in particular when leaders have to deal with what is considered the normal state of today's democratic organizations; continuous development and change. An according lack of rigid organizational structures – or disorganization - put even more power in the hands of leaders. *And ultimately, for the purpose of practical interventions, one does not have to give direct answers to the problematic question of “what is good leadership?”, but rather design arenas where it is developed as a capability of dealing and living within paradoxes.*

Part 5: Conclusions and Contributions – The Methodological Takeaway.

This part is structured to highlight the more generic elements or lessons learned from dealing with integrated leadership development in a large system. It aims to combine some overall conclusions from the discussions on actionable knowledge – as a methodological takeaway. As such, it both aims to make conclusions for the discussion on the research question and contribute to some of the main points identified when one is going to intervene in large systems, and also to make some conclusions constituting the ground for further “testing” of the concepts and possible application in future research processes. The disposition is three-fold and starts with revisiting the interventional challenges. Secondly, it looks closer at the design criteria for Reflexive Machineries and integrated leadership development, and finally, it concludes with a broader interventional perspective. *First*, the overall challenges of action oriented interventions, as identified and summed up in Part two as well as in the end of the three first analyses in Part four (Parts 4.1 – 4.3) are revisited to conclude the discussion. Here, the dimensions of “*regression effects and single projects*”, what is identified as “*non-human actors*”, as well as the “*enabling of leaders*”, are all recapitulated and discussed in terms of interventional design. *Second*, the design principles and pedagogy of the Reflexive Machinery are discussed in a general form, and with the intention of summing up the main elements as a frame for future practical testing, as well as for the use and elaboration of later development initiatives. *Third*, the scope is broadened, the Reflexive Machinery is contextualized, and its limitations as a single project are mirrored in suggestions for a broader scope of initiatives when dealing with large systems change.

5.1 The Gap between “Seminar Reality” and “Daily Operations” – Intervention Challenges (three)

One of the overall challenges in relation to the integration of leadership and organizational development is the question of how to establish more sustainable interventions in organizations where there is a demand for permanent and continuous organizational development. This challenge relates to the dichotomy of running the more or less steady pace of daily operations effectively, while at the same time being able to deal with developmental issues and increase the complexity of the surroundings. A metaphorical distinction between the *seminar reality* as an opposition to the *daily operations* can be applied when addressing these challenges. The focus of this text has been the conceptualization and introduction of Reflexive Machinery as a means to integrating leadership and organizational development, identifying its basic design principles, and giving examples of some content elements from the particular case. In addition, three categories of challenges for interventions have been introduced. Here I will discuss this reasoning a bit further by elaborating on each challenge, and focusing on how the elements and basic criteria of a Reflexive Machinery can contribute to the reasoning behind how to master them.

Within this picture, one of the basic practical and pedagogical challenges when executing training and development activities, as something outside and in addition to the daily operation, is to bring new insights or experiences back into actual use - to create new actions⁹¹, or to secure the effect of the developmental initiatives. As discussed previously, the “daily operation” is usually filled with heavy normative and material forces not directly present in the “seminar reality”, and effective translation of actions and conceptualizations from one arena to the other is crucial for creating sustained and relevant effects. This brings us back to the core of interventional methodological challenges:

⁹¹ In more academic terms, and in more conventional ways of conceiving knowledge production, this overall challenge is analogous to the link between theory (the seminar) and practice (daily operations), or the diffusion and transmission of knowledge from one area to another. Normally, such a perspective of the gap between theory and practice presupposes a view of knowledge as a commodity to be transferred, which is partly different to the perception displayed here, where knowledge basically is generated through systematic reflections on and in action. As such, the challenge is framed and dealt with based on other concepts than those connected to the theories in the field of “knowledge diffusion”.

1 Regression Effects and Individual Projects

Regression effects do, as introduced earlier, relate to the way intervention methods and initiatives tend to get the design of individual projects, and the challenges of making changes through individual or short-term projects. The vast majority of the AR literature covering methods for interventions is about short term projects carried out as individual projects (e.g the projects to be found in Reason and Bradury, 2001). In line with this, and for several reasons, developmental interventions are often applied and organized as “something else” and “something in addition” to the everyday activities and daily operations. What might tend to be commonly experienced as a *regression effect* is created when one “comes back” to the everyday life of work processes and operations, and is forced into the heavy material, economic, cultural and normative *forces* that govern the organization. The individual or short term projects make it difficult to overcome these regression effects, they will almost always necessarily face the general challenge of creating interventions with more long lasting effects, and interventions needed for a more continuous mastering of change. Based on this challenge, part of the main reasoning connected to Reflexive Machineries is that the probable effect should last longer, or have a higher impact if the intervention method is installed or institutionalized as part of the running developmental activities in the system or organization. But even more importantly, sustained effects are believed to be strengthened when the developmental activities are designed in way that fosters the application of daily, continuous, and systematic developments and improvements outside the program itself.

More separate developmental activities are always in danger of becoming a closed field with their own rules and behavioural norms and their own rationality and professional language, and the result is that the translation and application in daily operations become difficult. Even though creating high scores on user-evaluations made directly after the ending of a seminar or intervention is easy, the overall effect in the organization is more difficult to see in a long term manner, and in there are severe methodological problems for those trying to measure the effects. When facing the heavy forces of technological systems, management and control concepts and tools, external market demands, established norms of owners, cooperating partners, leaders, unions, interest groups, and employees or other relevant actors, potentially

good reflections made are forced to remain potentials, and the actual actions are in danger of returning to “how we have always done it”. Connected to Reflexive Machineries as intervention methods I have in the next part categorized some design choices, criteria, and the premise intended to increase the probability of more continuous effects, to reduce the gap between a seminar reality and the reality of everyday routines and daily operations. A Reflexive Machinery as it is conceived here then, by definition becomes an interventional method based on such a design premise, and an attempt to “mind the gap” between seminar realities and daily operations. The identified design criteria are particularly connected to the challenges of regressions and individual projects, or the institutionalization of interventions.

For example the principle of the “*relevance of learning objectives*” (further discussed below), and the enhancement of the focus and energy in the Reflexive Machinery by linking it to the “forces” already governing the organization is one such an ambition. In this particular case it was important to make it one of the many forces pulling in the same direction towards organizational change, and putting it on the strategic table of the managers. It also included a closer integration of the existing programs and departments of leadership training directly with the organizational change. As a program running for more than four years, it also secured an “institutionalization” of the rationality and reasoning for integration of leadership and organizational development.

Similarly, the design principle of “*broad involvement*” refers to the importance of creating a large enough or “critical” mass of actors able to move the process forward. In a system consisting of several thousand people (at the time approximately 25,000, although less than half of them were directly affected) designing a direct participation for development is difficult, especially over time and in the long run, and even indirectly participation requires “broad” involvement. The simple reasoning behind this principle is that regression effects are slowed down with a broader involvement, and that the momentum of change forces gets stronger. But broad involvement does not necessarily lead to improvements in a wanted direction per se. The additional principle of “longevity and follow up activities” naturally follows when involvement is intended to contribute to more or less continuous challenges, and for challenges that will not be finished and completed within a short timeframe. It also refers to the

benefits of institutionalization and the instalment of interventional methods. Developments requiring new learning are normally believed to be enhanced both by repetitions and a continued focus on the chosen topic, and thereby work to counteract the regression effect. As for this case, the role of leaders was at the core, and the integration of leadership and organizational development was then institutionalized as a Reflexive Machinery, where the leaders' abilities to run daily improvements and developments were at the core.

2 The Challenge of Non-Human Actors

A common objective for developmental activities and interventions, particularly those influenced by the tradition of Action Research, is the creation of broad participation, democratic dialogues, networks, and relationships between actors and relevant stakeholders in and between the participating systemic parts. As discussed in Part 4.3, one working hypothesis is that this focus on social processes and dialogue can contribute to an “under-communication” of other relevant actors, and thereby partly put the heavy forces of “non-human actors” out of the dialogue. If so, the heavy forces of the never ending and continuous streams of organizational concepts and tools, both the highly useful and the mere fashions and fads, contribute to limiting the effect of the dialogues, particularly when they are dealt with as empirical facts, or even more critically, rejected as fashion, or not treated as relevant actors at all. The result could potentially be that the intervention based on such dialogues will not help the organization master and handle other influential and non-human actors. And although the approach of socio-technical system theory is particularly built and established through the same reasoning, it does not contain a language to deal with parallel rationalities of seeing integrated development as language development.

Typical examples of non-human actors are the more material forces such as ICT based systems with importance for developmental processes, as well as more immaterial organizational models, metaphors and theories. Models, metaphors and theories dominating the rationality of the daily language particularly contribute to form the scope of actions taken. The relevant non-human actors will vary, and based on the pedagogy and logic of Reflexive Machineries, both the technological rationality and the material systems can be designed into and given the role of such non-human

actors. The related challenges connected to for example a technological rationality are thoroughly dealt with in Part 4, and here I will give a short example from the introduction and establishment of one such ICT system.

The system for Balanced Scorecard (BSC), as also discussed briefly in Part 4.6, can be employed as one important example of such an actor. The BSC was a developmental activity to be both established and introduced in the beginning of the project period. As a forceful feedback system based on the logic of “management by objectives” it could potentially become a heavy moderator of future focuses and the development of teams. In a rather technophile language-game the BSC was also early perceived as an empirical “thing”, with fixed traits and particular effects. And as discussed in Part 4.6, putting this non-human actor into the developmental discourse illustrated that BSC could be introduced, translated and constructed in a wide variety of ways, as well as connected with diametrically opposite reasonings and rationalities. The particular concept and tool of BSC could – and was - at the same time translated into both a severe control system in use for top management to control and restructure the organization, as well as a developmental feedback system for autonomous teams, employing it as their own means for improving the participation in decision-making, cooperation and work environment. The point here is that developmental initiatives need to establish arenas that encounter the ability to effectively translate and bring the continuous stream of such organizational concepts into the discourse, and that this translation needs a systematic and language sensitive method to be applied effectively. The design criteria applied for these RMs can be used as one such way of creating an arena where these actors come into play in sound ways, in opposition to being defined as this or that empirical fact with given consequences.

Within this discussion it is tempting to speculate into the reason for a seeming absence in explicit focus of non-human actors in AR⁹²: Just as social scientists and HR oriented discourses naturally seem to have a tendency of focusing on social

⁹² This is not to say that technology or economy is ignored in AR approaches, for instance “Socio-Technical System Theory” approaches and the like are heavily influenced by technological dimensions, but rather to say that these do not actively treat technology as actors in the dialogue – as actors influencing language and rationality, or as both constitutive and reductive concepts. This is especially so when we think of developmental tools based on information and communication technology, which are rather direct moderators of the dialogue.

processes of interventions, and partly ignoring the heavy forces of technological and economical actors, the technology- and economy- dominated discourses seem to have a tendency of ignoring important dimensions of social processes. The challenge is then to create arenas able to deal with this and other parallel discourses, parallel knowledge production regimes, and parallel fields of power, and integrate these “unlocking” activities into the arenas where the reality is created and decisions are made. This is not a one-time project, but a continuous organizational challenge. It can never be accomplished through a quick fix, or a short-lived project, and Reflexive Machineries as installed interventions might be one possible contribution towards creating a permanent developmental state of dealing with such non-human actors.

To deal with and properly master non-human actors, the most relevant of the listed design criteria below then becomes the one labelled “conceptual learning”. This criterion refers to the introduction of new (or externally derived) concepts in reflection cycles, which could be tools like BSC, economical models, category systems, and models and examples for organizational development or leadership activities. In addition to bringing in a method for more actively dealing with non-human actors, conceptual learning also makes it possible to transcend the life world, groupthink effects or inherent borders in a group’s conceptual horizon. It makes it possible to bring in expert concepts and tools that might otherwise not be introduced as part of the internal discourses⁹³. Similarly, the design element connected to “*continuous redesign*” also allows for dealing with an assimilation and adaptation of new important non-human actors. For instance, when new policies and new management mechanisms are introduced, a Reflexive Machinery can, based on the design criteria above, work as a translating machine contributing to the creation of a more proactive mastering, and more so than is the case in the often experienced BOHICA⁹⁴ syndrome.

⁹³ Conceptual learning also opens up for the possibility of non-democratic processes and a manipulation of people and reflections. As such, it connects to the large debate of what is ethically sound AR. I will not go into this debate here, but argue that bringing in outside concepts can be just as liberating as purely co-generated concepts, and that co-generated concepts are also in danger of becoming unethical and manipulative. The main ethical consideration is rather how it is done and designed, and not a inherited part of the method itself. As amongst others Cook & Kothari (2001) show, direct participation can be just as tyrannical as straight manipulation, and this has to be dealt with through a methodological approach.

⁹⁴ The popularity of this abbreviation (for Bend Over Here It Comes Again) is symptomatic for a widespread syndrome in organizations not having sound methods for dealing with the continuous and potentially increasing stream of new concepts, or when those are treated as empirical entities.

3 Lack of Enabling of Leaders

As particularly discussed in Part two, a third challenge, and partly absent as a distinct topic in the literature of AR interventions, is the topic of leadership in general and leadership development in particular⁹⁵. Needless to state, almost all of this text and this particular RM is connected to leadership development, and I will only give a short addition in this part. Enabling an organization to effectively apply participation based change-methods is often explicitly part of the goal in AR projects, and almost everyone will from time to time experience that it requires having or developing leaders that are able to understand and orchestrate such processes. As such, continuous enabling of leaders can in the tradition of AR be seen as an underestimated effort and precondition in helping the organization run better change processes. Neglecting the importance of the leadership role for participation seems to be rather common when one judges from the perspective of AR literature. One can speculate as to why this is the case, and one can attempt to contribute to this challenge by creating interventions with a focus on the integration of leadership and organizational development. By use of the pedagogical principles and design criteria mentioned below, I argue that Reflexive Machineries could support and help the leaders to better cope with and master such continuous developmental processes, as well as they can bring the focus and knowledge on leadership back into the tradition of Action Research.

5.2 Generic Design Principles and Pedagogy

In order to further conceptualize what a Reflexive Machinery is about, and conclude on its further use, it can be useful to re-explore some of the main design principles

⁹⁵ AR is one of the very few research approaches dealing with organizational development and organizational change, almost without a conceptualization of leadership. In the literature it comprises a blind spot, and when looking at an overview of books in the field like the “Handbook of Action Research” (Reason & Bradbury, 2001) one will make interesting findings simply by looking at the subject index. It shows that more than 200 (out of 445) pages is dedicated to *participation* and only five is dedicated to leadership (The five pages refer to one project concerning black female community leaders). When asking one of the editors, Peter Reason, (conversation at Bath in 2005) why this is the case, he was surprised of this fact, and blamed the one-dimensional focus on social constructions. He also added that in the second edition of the AR overview, the topic of leadership will be even less present.

and the ruling pedagogy applied. Operating on three levels, as leadership development, organizational development, and a research process, the main logic of the Reflexive Machinery is to create a state of continuous learning and improvement through the use of generic methods for reflection, in terms of experiential based learning and knowledge production. The concept itself is designed through the use of basic experiential learning principles with the purpose of establishing integrated and continuous methods for systematic reflection on and in practical activities. The main design elements and pedagogical dimensions can be put under the umbrella of experiential learning principles, and are in line with what has been identified as effective training in the research on experiential learning processes and training techniques (e.g. Yukl, 2006, summarizes this research through a similar set of criteria). As such, these criteria or principles are not to be considered as original for Reflexive Machineries alone, but rather illustrate how the design can be related to commonly identified headings for effective development. They can be synthesized and summarized under the following labels of criteria – *or rather prescriptions* - for effective learning processes and integration of organizational and individual development:

- 1) **Relevant learning objectives:** This criterion relates to increasing the ability to make development initiatives relevant for daily operations, which is also the basic background for the challenges identified in Parts 2, 4, and below. The selection of substantial thematical topics in a RM should be directly coupled to a present strategy, the actual challenges, and other existing processes in the system. To diminish the erasing effects from other governing processes, other rationalities, non-human actors, as well as concrete projects going on in the organization, the RM should be able to identify and deal with important connection points, and work in accordance with and as a support system for these activities. Consequently, both the development of main topics and the overall design are believed to have an increased effect the closer and more connected it is to actual processes. As exemplified in this case, the RM was particularly attuned to dealing with real life challenges and objectives in the introduction of a more cross-functional and team-based organization. This criterion could be opposed to traditional leadership development with a more

direct and main focus on individual maturation, particularly in cases where the main challenges are identified as the ability to orchestrate organizational processes, or to deal with challenges of continuous development.

- 2) Conceptual learning:** This criterion links to seeing organizational and individual development as language development as well, which is a basic theoretical approach for the analysis in Part 4. To transcend the existing rationality and language in use, the cycles of reflection on action and knowledge production should be informed and formed by “external” and theoretical concepts only – or metaphors that work differently than those already present. These could be both concepts such as fashions, fads, and different tools from organization theory as well as researcher driven concepts derived from (co-)researcher analyses of the field. To provide such “externally” derived category systems, analogies and metaphors, examples, diagrams, and models, is done to facilitate and systematize reflections and offer language with the intention of developing experiences conceived as necessary for the learning objectives. For instance, when organizational development is at the core, the development of a language in use connected to social processes is considered fruitful. This criterion could be opposed to developmental initiatives that are purely based on the participators’ experiences, without any added or externally derived concepts, or development initiatives without sensitivity for the potential blocking effects of existing rationalities, or a language derived and rooted in a different praxis than the one to be developed.
- 3) Sequencing of content:** This criterion relates to the simple notion that an ordering of content matters for conceptual learning for practical purposes as discussed i.e. in Part 4.3, or in short, that one has to get a grip of basic and simple distinctions and categories within a rationality before entering the more complex ones. Just as for learning a profession, the training on basic elements normally comes before the introduction of complex ones. As exemplified when training for the orchestration of team development toward autonomy, the principle of conceptualization goes from first dealing with responsibilities for frequent routine tasks, and through a stepwise

development toward responsibilities for more complex tasks, as opposed to a conceptualization of an implementation or shift from one model into the next. Sequencing in this case also means that the training activities are sequenced to take the maturation of groups into account, as well as to be sensitive to psychological phases of development. This includes, for instance, designing activities in an early phase suitable for typical “forming” group processes, and in general to go from simpler to more complex structures of ideas and activities over time. For example; learning to read and observe basic communication patterns for groups comes before observing complex psychodynamic elements.

- 4) **Mix of training methods and active practice:** This criterion relates to the idea that mixed ways of theoretical and practical training are mutually supportive in creating learning effects as discussed in 4.5. Systematic reflections could then be performed on and in mixed sets of actions, and in a large number of ways. Different kinds of lectures and lecturers, demonstrations and illustrations, group processes and group works, role plays and simulations, use of video analyses and observational feedbacks, and open brainstorming and structured discussions, could all be adjusted to the relevant topic, and varied to create suitable cycles of reflection and action. The participants should be given the opportunity to train and test concrete behaviours based on concrete and actual examples from their own field of experience, practice the relevant skills to be learned, translate, restate, and apply the principles and concepts established. This criterion is, as opposed to learning activities, based on more *individual means* such as traditional classroom lectures, or forms of open and direct participation only structured by the participants themselves.

- 5) **Broad involvement:** This criterion is related to the logic of social systems, and insights connected to broad participation as a democratic necessity as well as a pragmatic means to creating necessary ownership in the processes. A necessary but not sufficient criterion for change processes, particularly in large systems, seems to be that a “critical mass or number” of stakeholders and actors have to be engaged. For this particular case, one of the main

interventional purposes was to secure this dimension of involvement, and particularly through the involvement of a broad part of the organization including the front line leaders. Involvement can be designed both directly through the participation of all actors, and for larger systems vertical or horizontal selections of actors might be necessary, or as in this case, participation can be fostered or made more likely by “training the trainers”, or focusing on the crucial role of front line leaders and their ability to orchestrate participation and involvement. Even though the necessity of broad involvement in social processes are well documented, the practical accomplishment seems to be an Achilles heel of many organizational development initiatives, and the opposition to this criteria, going for the “short process”, is manifold, and the actual consequences often seem to be even longer and more time consuming processes, than for those based on well balanced involvement.

- 6) **Methodological form and content consistency:** This criterion refers to the logic of social processes discussed in Part 4.2, and the need to build developmental initiatives on principles consistent with the objectives one wants to achieve. For instance, in order to develop a highly participation based organization; this has to be achieved through the means of participation based processes. In a parallel way, the methodologies for reflection based and experiential learning and knowledge production is at the same time both a design element and a substantial content element in the RM. The logic of the pedagogy itself is one of the substance elements introduced to the leaders participating in the program, as an ability to further structure their reflections and improvement processes in their daily work. For example the reflection processes were in general structured through the phases of observations, analysis, improvement suggestions, and actual practical testing. Consistency in this case then relates to running an RM based on experiential learning - where teaching experiential learning as a method is essential. The RM should also be designed by the same principles. This criterion could be seen as the opposite to using traditional learning principles as lectures and theory readings for the purpose of experiential

learning, or, in actual organizational praxis, to use the hierarchical line to force someone to participate - or bomb nations into democracy...

- 7) **Longevity and follow up activities:** This criterion relates to the experience that real learning and maturation on important issues takes time, is limited by a large set of normative, cultural and material forces (as discussed through part 4), and can by no means be treated as a quick fix. To establish robustness and necessary continuation in the learning process, initiatives like this have to consist of a minimum set of modules and lastingness. The general logic seems simple, in the sense that the longer and more pervasive the initiatives, the more likely are the effects. This is not a necessity, however, as there are many examples of long term educational forms with limited effects on leadership abilities, and time and resources necessarily have to be complemented by other pedagogical qualities. Longevity and duration is important for all learning, and running programs over time also makes it possible to connect them to everyday routines by the use of actual development tasks between and after modules. Other types of follow up activities include establishing permanent leadership networks for further sharing of experiences, coaching leadership groups in their everyday setting, and so on. This criterion could be seen as opposed to the many development activities having the form of extraordinary – and individually occurring – initiatives, for instance such as going away for a couple of days and do team building activities.
- 8) **Continuous redesign:** This criterion relates to the practical situation in any modern organization or system where a never ending and continuous stream of new initiatives, situational factors, or other new challenges create frequent shifts in the governing agenda and scope of attentions. To be able to work in accordance to the most important shifts, and be of relevance as an initiative (criteria one), there should be systematic and continuous adjustment in the initiative. Long lasting programs have to adapt and assimilate new topics of importance, and deal with the continuous stream of changes in their surroundings. Both systematic feedback systems and evaluations of the program, as well as governing signals and connection points with the overall

strategic challenges of the organization, should be used as developmental feedback for the program. This does of course not mean that basic ideas should be abandoned each time a new organizational initiative is launched, but rather that one at all times should secure relevance through a clear connection to changes of importance.

Within conventional research, these main design choices – or prescriptions as they are formulated here - are rather well documented approaches for learning, training, and development (e.g Yukl 2006), and these days there is a vast amount of (fashion-) literature on the topic of “*learning organization*” working with diverse empirical and theoretical contributions to the field. As such, the generic reasoning behind RMs and interventional research, or the attempt to give a prescriptive summation of the pedagogical elements here, is not necessarily, or only, coupled directly to the case-content. When the aim is to contribute to a set of interventional methods for large systems change, and at the same time deal with such challenges as regression effects and leadership enabling, there are a lot of possible content topics that could have relevance. In fact, I will argue that one of the most important design principles is the one above, labeled “*relevant learning objectives*”, which focus the need to integrate the RM with strategies, actual challenges, and existing ambitions of organizational development. For this case the basic relevant learning objective was to be better able to orchestrate the organizational development process into more cross-functional and autonomous teams. As such, the criterion connects the initiative to the integration of leadership development and organizational development, and is what makes the initiative differ from many other leadership development efforts with a more individual focus on leadership development. This learning objective is of course not relevant for all cases, and for most cases then, the criteria have to be given new content elements. The next part deals further with generic design elements for interventions, but relates them more explicitly to the experiences connected to the topic of large system change.

5.3 Widened Ramifications – The Need for Parallel Activities

The design principles introduced are not only intended to create effects in one concrete effort directed toward leaders, but points toward a larger discussion on how to deal effectively with “large system change” through the means of integrated leadership development. When the scope of ramification is broadened from looking at institutionalized single actions or programs, to what is necessary for creating change in large systems, *the sum and portfolio of actions* comes into focus. The acknowledgement of the complexity of forces governing large systems, the limitations always encountered in dealing with single actions, and the experiences made, all point toward the formulations of wider principles and perspectives than those connected to design criteria of one integrated program alone. Experiences from the sum of projects in this particular system and insights into how they are managed and coordinated, make it desirable to end this text with an attempt to formulate some basic principles for “large systems change”. These basic principles represent an attempt to sum up the experiences so far and what seems to increase the likeliness of actual “large system change”, and they can be conceived as an ambition to create prescriptive principles for further development and testing in later projects (they build directly on previous attempts to sum up the experiences e.g. Fossen, 2004, 2005, and Fossen & Winther, 2005)⁹⁶:

- 1) *At least one larger organizational development activity should at all times be directly coupled with the main system strategy.*

A main problem or challenge in dealing with large system change is the traditional role of “Human Resource” departments, and the way developmental tasks too weakly connect to the system’s main activities and strategies. Both as experienced for this system, and when testing such hypotheses with representatives from others, it is confirmed that the focus of development activities run by HR departments, is often narrowed down to issues of social interactions, team work, communication, training, etc. For larger systems with large HR departments, the relevance of these seems to

⁹⁶ The principles are carved out as a concentrate from the six years of projects by the project group, and three versions have previously been presented; one in Academy of Management (2005), on at EGOS (2006) and one at the Norwegian Forum for New Organizational Concepts in the Process industry (FNDP) (2006).

be directly dependent on their ability to be - and their acknowledgement as - part of the arenas connected to the development of core business and core activities. All too often the internal discourses seem to be dominated by a perspective where these departments are something else, dealing with extraordinary activities of only peripheral and indirect consequences for the more important issues, almost like a luxury activity of seminars we can afford in good times and when all other parameters are under control. If this perception of a lower status for HR activities is widespread, the divide contributes to deepening the cleavage between the “seminar reality” of “soft” development activities, and the “hard” and resource-consuming reality of “daily operations”. To handle this situation, the integration of operational strategies and demands for continuous development is necessary, and one of the possible means is to closer integrate the institutionalization of HR activities to strategic activities. It can also be supported through the institutionalization and closer integration of leadership programs and major strategic issues, for example by bringing strategic issues into the different kinds of Reflexive Machineries.

2) Several parallel and loosely coupled activities secure robustness and help foster the developmental momentum.

When all activities are organized and placed under one umbrella – i.e. a department or “three letter abbreviations” (TLA’s) – it increases the vulnerability to one failed activity’s effect upon other initiatives. One main experience from this case is that it is difficult to be able to determine in advance which initiatives will represent a developmental “take off”, and which will fail or foster resistance. By having a series of parallel processes running, all of which being designed to pull in the overall wanted direction, the likelihood is increased for always having at least one main activity gaining rather than losing momentum and motivation for change. As such a minimum variety of developmental initiatives can gain robustness from network logic and reasoning, where the shutdown of one network node does not affect the network of initiatives as a whole. A network of initiatives can for example range and span everything from large scale gatherings involving all employees and designed to give language and prepare for what is coming, local and departmental participation processes, introduction of technology and governing mechanisms designed to

support the particular initiatives, informational and communication strategies, to integrated leadership development issues.

3) *Organizational change requires restructuring and development of language*

As long as the system contains a governing discourse and use of language where developmental activities are “something else” and outside ordinary activities, the reality is likely to stay that way. For example, an important reason for the experienced gap between *seminar reality* and *daily operations* is the differences in how the language is *used to create meaning* and understanding of and in the situation. The seminar discourse is in general more theoretically influenced, in a more simulative way, while the discourse of daily operations by nature is more directly oriented towards practical problems. Typical for this divide is a rather humorous quote once overheard when a participant spoke with a colleague at the phone: *“I am not at work, I am at a seminar...”*

To better bridge the gap, one has to create arenas where the language in use, and its corresponding actions, creates more analogous constructions. To reduce the possible regression effects, the developmental discourse of the developmental activities thus preferably has to be more like the constructions of daily operations. The distinction itself increases the probability of placing developmental tasks “outside” the organizational or hierarchical line of daily operations, and through the dominant language this contributes to outsourcing development efforts to less important and less risky arenas.

As such, both in theory and practice, language development is closely connected to practical development, and changes to the governing metaphors, concepts, and tools are rarely a quick fix strategy. One has to create arenas that rework the language over time, and contribute to the normative and mental shifts required. To be aware of the kinds of language and self-identification that govern the organization, and show how they frame the understanding of limits and possibilities as a continuous normative feedback, it is necessary to create a start working with this change.

4) *Communication resources should support large system change by constructive storytelling.*

Large systems normally spend large amounts of resources on internal and external communication, and hold separate departments dealing basically with communication efforts. One of the arenas for organizational language development could naturally be a part of these communication resources. To our experience this is rarely the case, and the departments dealing with internal communication are in particular danger of being perceived as management messengers only, rather than as language and organizational developers. As it is a bit outside the topic of this text, it has not been dealt with earlier in the analysis, but parts of my later projects have also been connected to leadership and organizational development in the department responsible for internal and external “Corporate Communication”. Internally they are responsible for the production of products such as magazines, newsletters, websites, information materials, and the electronic messaging systems. And even though the resources spent are quite large, their role in the development of the system, and particularly their potential role in the organizational development to become “The Best Operator in the Industry”, has not been acknowledged until recently – and partly in retrospect.

The importance of communication – sometimes almost like a mantra - seems rather well acknowledged for change processes, but contrary to the insights of the importance of participation and involvement, it seems to be treated like a potential one way effort, as if one has to build a top-down messaging system, where the most important elements are to make the employees understand the intentions and ambitions of the management by feeding them information, and where resistance to change is interpreted as a lack of understanding, or even a lack of information. This is contrary to the main analysis of this case, where the development of understanding is rather connected to the development of a language and rationality more attuned to handling social processes. As such, it is not the amount of information that matters, but how it eventually is able to penetrate and change the governing conceptual

understandings of the matter⁹⁷. Large amounts of information or communication resources spent within an existing or governing rationality and language in use, does not necessarily contribute to developing the understanding, and just as for organizational change in general, systems for participation and involvement are necessary for effective and actual development.

Constructive storytelling then – as opposed to reductive or simply descriptive storytelling – is related to the potential ability to rework the governing rationality and contribute to shared concepts, stories, and metaphors that produce actions - or metaphors that work. An illustrating observation was made offshore at one of the platforms. The employees of a department had created a “boot hill” graveyard drawing on the wall, and all the tombstones had been given the names of previous change efforts. The story was “this is what we live with here”: The initiatives for organizational change or development comes with almost regular intervals; they are at the top of the agenda for some time, and after a while it “blows over”. The initiative dies, and everything is as it was before. Interestingly, exploring the performance indicators for the same period of time gave the complete opposite picture: The reported work environment was enhanced, and the health and safety numbers had particularly improved, and the organizational production indicators were drastically better as well. Simply stated, on the one side, there were stories that told of everything being as it always have been – and probably worse, and on the other side, the organization had improved rather considerably (a point also made in Fossen 2001).

What the example contributes to illustrate is that simply reporting the governing rationality, asking for a “bottom-up” picture of how things are, working as neutral information processors of “top-down” messages, or applying the already existing metaphors and images, does not necessarily contribute to improvement. The main contribution should therefore be to analyze the governing rationalities and rather

⁹⁷ It is tempting to interpret resistance to change as being due to a lack of information, as this is often reported by those affected in work environment analysis. But in the perspective applied here, this response seems merely to be a symptom of insufficient involvement rather than insufficient information. The reason for this perspective is the almost infinite demand for information experienced in change processes, and the paradox that even large amounts of information seem to trigger the same response, particularly if the information evokes responses of defence and rejection.

contribute to learning and development processes through interventions in these, for example by feeding back paradoxes of constitutive potential.

5) Integrated leadership development should be part of the development initiatives

As one of the main focuses for discussion throughout this text, and as a conclusion of the overall research question, it is maybe no surprise that integrated leadership is given a separate role of importance, or listed as a main element for large system change processes. One of the main challenges of large system change, as for this case, seems to be that an already overloaded leadership role and position is not able to allocate and prioritize the resources necessary, or sufficiently deal with the massive work of organizational development. At the same time there are limited effects to be gained by “outsourcing” developmental initiatives, or to structure them solely as separate activities. And as the reasoning goes for the analysis of this text, this generalized situation makes it crucial to design leadership development activities that are able to support the overall change ambitions. For the cases where there are resources already allocated to leadership development, these should be applied not only as the traditional focus on individual development, but on how to run and orchestrate effective change processes.

It could be added to this that large system change also involves the establishment of Reflexive Machineries and other similar arenas made to influence and intervene in the processes of sense-making, developmental actions, and decision making, contrary to the normal use of leadership or developmental seminars, which are arranged as “one-timers”, or leadership development programs running for extended periods, which normally are focused on individuals. This also includes the use of tools for control and measurement feedback on daily routines, as for example tools for “management by objectives” run on a permanent basis, and other concepts – fashions or fads – governing the everyday discourse and praxis in the organization. If those dealing with developmental processes have real ambitions of penetrating the heavy forces of daily routines, they have to gain admittance to arenas where the reality is created and decisions are made, and they have to be able to contribute to balance the regimes of “hierarchies”, “collegiums”, and “networks” (as conceptualized

in 4.6). One strategy could then to a larger extent be to institutionalize developmental arenas that work on a more permanent basis, and which actively aim to deal with and create development closer integrated with daily operations.

In total, these five points abstract some of the main summations for the project work based on the ongoing praxis and action research projects made so far in this large system. In addition to relaying and summarizing an answer to the research question, they also function as the main basis for further practical testing and development, and together with the design criteria presented; they form my contemporary prescriptions for further development, and for the future development of a toolbox better guiding large system change and integrated leadership development.

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