



The Consciously Competent Practitioner: The Imperative to Know That We Know and to Show That We Know

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Over the last three-and-a-half years, in my role as Executive Director of the OD Network, and also by nature as a student of human systems, I have been standing on the margins of the field of OD and trying to create a coherent story from the different clusters of perceptions about our work that I have been collecting from our thought leaders, our colleagues, and our customers. While I have made some satisfying progress in trying to make sense of our evolution, ours is an applied field, and this task has, as you might imagine, not been an easy assignment. Nonetheless, it has been a necessary step in the OD Network's efforts to clarify and stake out the center of the field, to serve as a core node in a network-of-networks, and to bring more visibility, credibility, and influence to our profession in the larger world. Thus, throughout my tenure, much of my own work has been focused on helping those of us who practice OD to talk about its purpose more simply and clearly, to measure and report the effectiveness of our work more intentionally, and to promote its value vigorously and relentlessly.

What We are Facing

While I know these days we have begun to hear more uncertainty about the future of the field and more predictions about the inevitable demise of OD, when I take a step back from those assumptions, I am not so convinced that our days are numbered. However, I am aware that we seem to be struggling with the same issues that were bedeviling us when I entered the field over 30 years ago. For instance, why do we still have such trouble describing what we do? Are we serving human needs or business goals, or both? Do we really need to ground our work in theory and research, or is our intuition about a process or an intervention sufficient? How do we catch the eye of key decision makers and gain their regard, trust, and engagement? Can we add value no matter where we work and yet remain true to our values?

Obviously, these are not trivial questions, and yet perhaps there is no way to answer nor resolve them definitively. In fact, these are the types of complex, knotty questions we often use to stage important conversations in the organizations that we are serving. But it is not facing a set of 'unanswerable' questions that unnerves me, it is encountering, again and again, these particular questions. Clearly, in the words of those respected rock-and-roll philosophers, the Talking Heads, it is the "same as it ever was," and I believe that our inability to come to some reasonably satisfying, collective resolution is not serving us well as a field, and that this confusion itself may contribute to our diminishing footprint.

So why are we still talking about these issues? If you have been reading the literature in our field or listening to our thought leaders, you know there are many speculations.



Now, I will offer a few of my own.

For a while now I have been wondering if organization development, as a field and profession, is not experiencing, at a group level, the truth of the familiar adage from the theory supporting the Myers-Briggs Type Indicator¹, that “our greatest strength can also be our greatest blindside”. Obviously, we know that part of the strength that we can offer as applied behavioral scientists is based on our origins as a hybrid discipline that has incorporated theory, concepts, and practices from social psychology, adult learning theory, education, anthropology, sociology, social work, business, psychology, and others. For those of us who work with issues of inclusion and difference in organizations, we know that a rare type of power coalesces in groups that contain and use this range of diversity. For us, however, while these multiple disciplines have been integrated in our progressively more sophisticated approaches to designing and facilitating human processes, they may also represent the shadow side of such diversity - a natural push-and-pull against defining and articulating our “core.” Where, in other words, is our center?

The critical importance of clarifying “core competencies” in a business setting first gained impetus in the writing of C.K. Prahalad and Gary Hamel². They defined an organization’s core competencies as those that cannot be easily acquired by others and that can also be easily leveraged across contexts; and the concept accrues its power from the presumption that an organization will only fulfill its purpose and potential by identifying and then eliminating any processes, products, services, or functions that are not a part of its ‘core.’ Just as power in groups coalesces around diversity, it presumably also coalesces around such a steely, single-minded focus, and that, I believe, is what we are still searching for and have yet to agree on as a field. We have only to read and compare the multiple definitions of OD in our textbooks and across practitioner websites to see how much variation there is in descriptions of what we do. Ask colleagues at a professional gathering to define our work, and after an uncomfortable silence, listen either to the rueful laughter, the long silences, or the range of possibilities that are offered.

I am not suggesting that we are required to have a profession-wide version of a rote “elevator speech” to parrot back when asked to define our work. But I do believe that there have been some unfortunate, unintended consequences from our collective failure to join together as a professional community to agree on a common definition of our purpose and principles. Clearly, we do not lack alternatives to choose from, since there are proposed definitions in every book about OD and in every syllabus in every course or workshop that introduces the field. And perhaps it would be impossible in our evolution to create a sense of collective agreement across the various stakeholder groups we represent. But consider how not having such agreement and commitment to such a core definition and purpose may have diluted our presence and our value in the marketplace. I believe it is a

key reason why marketing our field often feels like heavy lifting.

In addition to a diffuse core as a field, over the last few decades a number of important activities that have long been a key part of our contribution to organizational life have been unbundled and carried away by separate groups that have then positioned themselves as separate, visible ‘owners’ of that realm of competence. The International Coaching Federation (ICF) now dominates the field of coaching and has introduced a highly-articulated, complex certification process. The International Association of Facilitators (IAF) has peeled facilitation from our job description and now concentrates on this dimension of our work. A new professional association, the Association for Change Management Professionals (ACMP) has just emerged to serve the needs of ‘change management’ professionals, capitalizing on the easy definition that those words suggest. I could go on, but you get the point I am sure.

Thus, because we have been collectively unable to stake out the center of our field with simple conceptual and linguistic clarity, we are now facing a situation where we also appear to have lost professional control over several flagship areas of historical competency that contributed to our earlier credibility and importance. In other words, while we were debating and disagreeing among ourselves, we did not notice that we were being co-opted.

So here we sit as a field, moving into the second decade of the 21st century - buttressed by a foundation of useful research, enriched with knowledge and experience accumulated through decades of successful practice, schooled more rigorously and creatively than ever before - and failing to be recognized as a vital resource needed to help the citizens of the globe work together in large and small ways, failing to pool our wisdom and ensure our survival. This is a pivotal time for our field, and our challenges are complex. How might we empower ourselves so that we are the trustworthy conveners-of-choice for conversations about the future, as we deserve to be? Here are a few possibilities.

Stepping Back into the Center

Those of us who have worked in the arena of adult learning are likely to be familiar with a simple, four-stage model that labels the progressive stages that a learner passes through in the process of mastering a new skill or ability. Recall that in this model, a learner starts from a ground-zero position of ‘unconscious incompetence,’ and, as the process of learning unfolds, moves progressively from ‘conscious incompetence,’ to ‘conscious competence,’ and finally, if the process is successful, achieves a level of fully-assimilated mastery, ‘unconscious competence’³. I remind us of this framework for charting a learner’s progress because I think a potential solution to the dilemma I have described above lies embedded in one of these stages, specifically the third stage, ‘conscious competence.’ At this stage, we know something, and we know that we know it. We are conscious of our own



competence, and therefore we are able to name it, describe it explicitly, and acknowledge it fully. Our mastery is not tacit. It is available for analysis and conversation. Such open, public knowing is where, as a field, we might find a first, significant opportunity to step into our own power.

Knowing That We Know. During the conference on The New OD that NTL sponsored in March, 2010, Bob Marshak included in his keynote presentation an observation about the value for practitioners of constructing and articulating a personal, individual “theory-of-practice.” What is a theory-of-practice? Just as you might assume, it is a process and a structure that offers practitioners an opportunity to identify and articulate the specific research, formal theories, principles, values, assumptions, biases, and beliefs that guide their work. A robust, focused theory-of-practice seeks to pinpoint everything we think we know about the practice of organization development, and it is typically generated when we push ourselves to answer the (apparently) simplest of questions: what do we really know for sure?

Certainly, by using such an open-ended inquiry, a theory-of-practice could include anything—and everything—we consider necessary to do good work: the theories we find most useful and practical to frame our understanding of behavior in groups and organizations, the approaches we typically use to design and facilitate change because we believe they are the most powerful, the informal rules we follow to build and sustain successful relationships with customers, and anything else we use to ground and organize our own, individual professional lives. As far as I am aware, there is no universally-accepted, formal template for documenting a personal theory-of-practice. As is so often the case, it is the process of discovering and documenting this information for ourselves that makes it such a valuable, critically-relevant activity.

The truth is, whether we are aware of it or not, all of us who practice in the arena of applied behavioral science are using a personal theory-of-practice as a foundation for our work, but for most of us, this information remains tacit and implicit, and most of us rarely take the time to bring it to conscious awareness. I have been struggling myself for over 20 years to catalog my own theory-of-practice, and it remains a daunting project. Working to externalize a theory-of-practice requires us to work backwards from mastery, seeking to bring to conscious knowing what, typically, we never think about because, as successful practitioners, our competence has become unconscious. While this is a natural, anticipated consequence of professional mastery, we would serve both ourselves and the field of OD, were we committed, as individual practitioners, to push ourselves to make our own theories-of-practice known and available to talk about with others. Why? I think there at least two very good reasons.

Firstly, when we outline a personal theory-of-practice, we are forced to engage in a dialogue with ourselves about what we believe we know as professionals. That process,

as difficult as it may seem to be, will inevitably reinforce a personal, internal sense of confidence and competence as we interact with colleagues and potential customers. Secondly, since a theory-of-practice represents the engine that powers our work, consciously knowing what we know enables us to speak directly and concretely about what we know, and as a result, we are likely to be considerably clearer when we need to talk about what we are doing and why. Whether we are marketing our services or explaining a planned intervention, I believe that such clarity will lead to greater credibility, both for us personally and for the field as well, and greater credibility is the source of greater influence. Thus, despite the effort required, the payoff associated with creating a personal theory-of-practice seems more than worth it, especially now.

Showing That We Know. However, demonstrating conscious competence as a practitioner requires more than the ability to acknowledge and articulate specifically what we know. Undoubtedly, it also demands our willingness and ability to show that we know, and to do so requires that we courageously confront the vulnerability that accompanies a demand for professional accountability. Are we able to discern the ‘right work’ in a particular context? Are we able to do ‘good work’ and maintain that level of quality? How do we become better able to answer these questions? And how might we maintain our courage to continue learning and deepening our competence whatever our age or experience?

Of course, every time we work professionally we meet these questions head on, either directly or indirectly. During my own work as a consultant, and now, in role at the OD Network, I have wondered whether there might be a strategy to prepare ourselves more intentionally to meet this challenge. Recently I have realized that there may, in fact, be a viable solution, although one which will not emerge without our collective commitment and our collective effort as a professional community. What I now believe, after many years of active opposition, is that organization development, as a field, must develop and implement a process of professional certification. There are some undeniable benefits to such a process, as long as we can avoid some potential pitfalls in its design and administration. What certification does for us as a profession would be particularly useful now, since it sends a clear message to our customers and potential customers that there are rules and standards that determine the effectiveness of our work. Moreover, becoming certified would, by definition, mean that we are willing to risk having our professional competency assessed and that, in addition to its personal value, we believe that getting institutional feedback about our capabilities is also necessary to build and maintain the credibility of the field.

Given what I have observed in other professions, however, it seems to me that if we choose to install a certification processes, we must make sure that it fulfills its purpose as a strategy that will actually strengthen the field, and that its structure is congruent with our values. I believe we meet the former criterion by developing valid standards of



performance, and the latter by designing a process that will be perceived by practitioners who decide to pursue certification to be sufficiently rigorous to be a meaningful hurdle, accompanied by resources to support ongoing professional development, and facilitated with a respect for principles of adult learning and effective feedback.

To construct a valid, relevant, and meaningful certification experience, we must begin by first determining what we would be assessing. This means, of course, that, as a field, we must decide what we will choose as the hallmarks of competence. The field of competency profiling is very robust, and there are existing lists of proposed competencies for OD professionals in a number of texts and online. So much of the basic work required to organize our thinking about what competence looks like has, therefore, already been done.

My own position has evolved progressively through conversations with colleagues over the last few years, and I would strongly recommend that we take existing lists of proposed competencies and reorganize them into a benchmark profile, in a clear and simple format, of “essential practices.” In order to maintain a global focus, I also believe that the OD Network and the International OD Association (IODA) should collaborate on this initiative, and thus, these “essential practices” should include core approaches, activities, designs, methods, and mindsets needed for effective OD practice in any context or culture. Finally, I would also recommend that the OD Network serve as the steward for this benchmarking process: once created, the Network should endorse, publish, and promote the use of these essential practices as a foundation for effective, high-quality OD work around the world.

This framework of “essential practices” would then become the platform for the construction of a certification process, and in order to satisfy the criteria I proposed earlier, I believe that becoming a “certified OD professional” should unfold in three, successive stages or levels:

- **Level One:** To be certified at the first level, an applicant would be required to demonstrate knowledge of ‘essential’ OD concepts, theories, and research. The proof of mastery would depend on completing a written instrument, presumably developed by a consortium of faculty members and leaders from our academic OD programs. A Level One Certification would be available to anyone who chose to pursue it at any point in their career.
- **Level Two:** After achieving a Level One Certification, an applicant would be eligible to pursue Level Two, which would require participating in an assessment center process organized to evaluate the ability to use various “essential practices” at the agreed-upon level of mastery in a laboratory setting. Although the process would be a pass/fail one, in addition to receiving generous feedback about their performance,

applicants would also leave the experience with a professional development plan, identifying both their strengths and areas for development, and with recommended strategies for closing any gaps in their use of essential practices.

- **Level Three:** Finally, after achieving a Level Two Certification, an applicant would be eligible to pursue Level Three; and the successful completion of Level Three Certification requirements would allow an applicant to use a certification designation that acknowledges their mastery. And again, I would recommend that the decision to award a final, Level Three Certification should also be a pass/fail one. The demonstration of final mastery at Level Three would be based on the successful completion of an actual OD project, and it would involve documenting the successful fulfillment of the contract for this project through paperwork prepared separately by both applicant and customer; the contract and relevant project documents would then be reviewed and explored in depth through a final interview-conversation with two or three peer colleagues who are rotating, volunteer members of a certifying board. This culminating step is intended to ensure that certification is actually based on the effective use of essential practices in an actual engagement, and that a judgment of “success” is based on actual customer feedback.

I assume that influencing OD practitioners to become consciously competent may require a more compelling case than the one I have framed here; however, I am convinced that the strategy I have proposed here would allow us to return with greater confidence to a central position in the network of organizations (and disciplines) that design and facilitate human process and human systems development, and that is certainly where we belong.



BIOGRAPHY

Peter Norlin, Ph.D., currently the Executive Director of the Organization Development Network, has spent 30 years in the field of OD, working first as an internal consultant-leader for USF&G Insurance and Blue Cross Blue Shield of Maryland, and then as an external consultant, managing his own practice, GreenLeaf Associates. As an external consultant, he served a wide variety of customers, in corporate, government, and not-for-profit settings; from two-person partnerships to Fortune 100 companies; and in manufacturing, health care, education, retail, hospitality, legal, financial services, entertainment, and professional services sectors. A graduate of The Johns Hopkins University Masters Degree Program in Applied Behavioral Science/Organization Development, he also has an M.A. and Ph.D. from Northwestern University and a certificate in family therapy from the Center for Study of Human Systems; his teaching experience includes faculty appointments at Vanderbilt University, Johns Hopkins University, and Georgetown University. Based in Ann Arbor, Michigan,

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- ¹ Myers, I.B. (1995). *Gifts Differing: Understanding Personality Type* (2nd ed.). Boston. N. Brealey.
- ² Prahalad, C.K. and Hamel G. (2009). *The Core Competence of the Corporation*. HBR Enhanced OnPoint Edition.
- ³ This model is attributed originally to the humanist psychologist, Abraham Maslow whose life and work are featured in the Past Master section of this edition of Practising Social Change.