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Courses and Working Conferences as Transitional Learning Institutions*

The Background

ORIGINS

The approach to management training and development to be reported in this paper rests on a different premise from the purely group dynamics foundation of the study groups of the Leicester model or the T-group tradition of the National Training Laboratories (NTL) in the U.S. In both of these traditions groups concerned with the internal task of self-study and review are given no external task. My own experience, however, has convinced me that in organizational settings the internal task is best undertaken in conjunction with an external task. I have therefore called my approach the double task model.

In a note on study groups in the review of the first Leicester Conference (Trist and Sofer, 1959) J.D. Sutherland, the then Director of the Tavistock Clinic, who had himself taken a study group, stated

The special social situation which experience shows most useful for this purpose consists in having a group meet without the "external" task to be done, but with the specific task of examining the kinds of feelings and attitudes that arise spontaneously, these feelings and attitudes being those which each individual brings to any group situation, or which develop within it independently of whatever the external task may be.

In the follow-up of that conference some six months later, it became apparent that most members of the helping, educational and social professions had found study group experience relevant and useful, both personally and professionally. By contrast, most of those concerned with organizational and operational affairs had not found it of value in their back-home situations. Indeed, it created a barrier.

*A new paper.

The account of the follow-up meeting quotes me as drawing “a further parallel with the training work being done by the Tavistock Institute in industry, where there was no attempt to turn groups into study groups.” The method was to develop insight during the course of working through existing problems.

In organizational projects as early as 1947, I had introduced the procedure of “suspending the agenda,” in executive meetings, when no progress was being made with the task in hand. This allowed the group to review and reflect on the emotional and conflictual elements that were impeding its progress. In the Glacier project, Jaques (1951) gave up using extra-curricular sessions and relied solely on making interpretative comments in the working sessions of executive or union meetings.

My thinking at that time, and indeed since, has been much influenced by my experience, during the war, as a social therapist at Northfield Military Psychiatric Hospital. The activity groups I created influenced material brought into clinical groups in a positive way as regards therapeutic outcome. The two groups became interlocked and were often, with advantage, the same group in different modes. This interconnection expressed the double-task in action.

Shortly after Bion started therapy groups in the Tavistock Clinic in 1945 he gave an extended trial of his method of group-centered interpretation in training groups outside the medical area. One of these consisted of industrial managers, others of people from the educational field. These groups did not fare well. It seemed that a number of the participants were patients in disguise. We thought that it was best to remove this disguise and have the patients admit that they were seeking psychiatric treatment and should therefore be in a therapy group.

In 1946 the Institute held, in Nottingham, under the auspices of the Industrial Welfare Society, an exploratory residential conference using Bion's methods. The participants were fairly high ranking managers from a number of industries. The conference generated such stress that a distinguished member perforated an ulcer. He condemned the conference publicly. This episode had a decidedly chastening effect. Even carefully picked people in industry were not ready for anything of the study or T-group type. Our frontal approach had been a mistake. No more groups outside the medical area were attempted for another ten years, though psychodynamic projects continued and flourished in organizational settings. A seeming exception was a discussion group in the field of teacher training which worked on material provided by the members. This led to their undertaking a project—the production of a report on their proceedings to communicate their group experience to their profession (Herbert and Trist, 1953; Vol. I, “An Educational Model for Group Dynamics”).

In 1956 four senior people with NTL backgrounds were invited by the European Productivity Agency to make trials of NTL procedures in European countries. These trials were, on the whole, successful and the Tavistock was

approached to work out a design suitable for British conditions. This was how the first Leicester conference originated in 1957—as an experimental endeavor to discover a form of experiential learning acceptable in the U.K.

To make clear that this was not a therapeutic endeavor the Institute created the conference as a joint venture with the Education Department of a University, the link with education being similar to that made by NTL with the National Education Association. Like NTL, again, we had application groups and theory sessions as well as the study groups which were our own version of T-groups. Moreover, participants came through a sociological channel; they were nominated by organizations, though the decision whether or not to come was personal. To make relations with the Leicester community, we introduced external operational tasks in which participants engaged with local organizations (e.g., industrial firms, the police, hospitals and local government) in exploring some specific problem or issue which was of current concern to them. The conference was successful in that no-one came to harm; the patient-in-disguise phenomenon was stopped; the shadow of Nottingham was removed; a relationship with society made.

On behalf of the Institute, I spent the next summer in Bethel to make a thorough study of NTL methods. These summer “labs,” as they were called, contained a great variety of activities based on experiential learning which had established itself as an accepted educational innovation. Nevertheless, and despite the overall success of Leicester, I was still disquieted about T-groups and study groups. It seemed to me that the idea of a group of participants with the task of “learning about groups by being a group” meets Bion and Rickman’s (1943) conditions for the “study of its own internal tensions” only when the participants are patients prepared to join such a group with the expectation of “getting better.” Then the real-life task of the group is for the patients “to get well.” It did not seem to me that there was a compelling real task in the non-patient groups that I had experienced. Since this time movements such as the human potential movement emerging from the Esalen Institute, particularly from the influence of Abraham Maslow, have produced groups outside the medical area with a strong commitment to self study, but such groups are therapeutic or quasi-therapeutic in aim.

Bion’s original formulation had emphasized the need for the group’s situation to be a real-life one, i.e., an action situation. I therefore thought that a suitable real-life situation had to be found for non-medical groups whose members, such as managers, carried out organizational roles. Such a situation might be found if one could discover a way of working with participants in which they could bring into the group problems and concerns arising in their organizational settings. This way of working would entail creating circumstances in which they could recognize and pursue what I have called the double task.

AN ORGANIZATION THEORY BASIS

In his book *Leadership in Administration*, Selznick (1957) distinguishes between concepts of organization and institution:

The term organization suggests . . . a system of consciously co-ordinated activities. . . . It refers to a rational instrument engineered to do a job. . . . It has a formal system of rules and objectives. Tasks, powers, procedures are set out according to some officially approved pattern.

An institution, on the other hand, is more nearly a natural product of social needs and pressures—a responsive, adaptive organism.

This does not mean that any given enterprise must be either one or the other. While an extreme case may closely approach either an “ideal” organization or an “ideal” institution, most living associations . . . are complex mixtures of both designed and responsive behavior.

The process of adapting, of projecting and internalizing, of learning and acting, unconsciously as well as consciously, is the institutional characteristic. For convenience and in deference to present day usage of “organization” in both senses, the term organization will, predominantly, be used.

The organization is an open system with regard to its environment and is both “purpose-oriented” and “learning and self-reviewing.” The capability of carrying out this double-task at appropriate times and in the course of normal working when relevant, is becoming an essential feature in interdependent multi-disciplinary work forces.

The more rapid change rate has created a situation of far greater complexity, interdependence and uncertainty than organizations have previously encountered. Emery and Trist (1965, 1973) have called this situation the “turbulent environment.” More initiative is now required of managers, more innovative capability, more flexibility and more recognition of the need to cooperate. Greater understanding of group life at all levels is needed in order more effectively to manage transitions of one kind or another which are occurring with much greater frequency (Bridger, 1987).

Internal Courses: The Opportunity in Philips Electrical

About this time in the early 1960s the Institute divided into two operating groups, one of which undertook the further development of the Leicester model (Rice, 1965; Miller, Vol. I, “Experiential Learning in Groups I”), while the other, to which I belonged, was interested in the double-task approach. It is

scarcely accidental that the opportunity required to pursue this arose in an industrial setting with a company beset with problems of increased uncertainty, complexity and interdependence. The company in question was the British affiliate of Philips, the multi-national electronics firm, in itself a very large organization. To meet the challenge of the new conditions senior management took time out for self-review. As the result of a week's off-site conference they gave priority to Staff Development.

An immediate job was to develop training designs relevant to the new managerial competences (cf. Morgan, 1988). They were called Practice of Management Courses (PMCs) and required attention to process as well as to content. If the attendance was to be secured of the bulk of the most relevant managers for the kind of course contemplated, this could be no longer than a week. The aim was to produce a scheme that would permit extensive use.

Each facet of a pilot course was to be concerned with "managing groups at work"—which entailed **understanding** the dynamics of such groups. Hence the need to appreciate the role of informal systems and other processes affecting groups as operating entities. The **consultative** aspects of management were becoming increasingly significant, whether for more sophisticated and satisfying appraisal methods and career development, or for reaching the most effective outcome with a work force. I came to see the consultative process as a "basic building block" in the development of a group as well as an important element in its own right within any training scheme for organizational effectiveness (Bridger, 1980b).

The Study Group became a Work Group, but with a double task:

- The group had to work on selected issues of importance for group members in their organizational settings and in their roles. It was to manage its own selection of topics and to manage itself. It implicitly posed to itself the problem—and the challenge—of being able to face internal differentiation, thereby enabling leadership and other capabilities to be demonstrated according to the pertinent circumstances.
- The group had to identify the processes operating within it at different times, especially the way the group as a whole, with its particular set of values and norms, was influencing events and modes of working.

An "intergroup" experience (Higgin and Bridger, 1964) could be offered in a variety of forms, but in early models it consisted of an interim review of the course about two-thirds of the way through the week. Each Work Group would review the experience thus far and prepare recommendations for amending the remainder of the proposed program so as to better meet the original or changed expectations of members. In addition, each group was to select an appropriate group member (or two) to represent it at a meeting with the staff representative and jointly make some proposals.

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“Talk-discussions,” which gave a conceptual framework to the experience, were placed at points when they were most likely to be relevant.

The placing and interlocking of these aspects, together with transitions for entry and departure, were carefully thought through to ensure that both the real-life situation and the study of processes were operating for each component as well as for the whole. The course itself was regarded as a process consisting of three phases: pre-course, the residential week and post-course.

The procedure described in what follows represents the mature model which evolved after extensive trials when the demand for a large number of courses had been created. It is based on my joint paper with one of the internal consultants (Low and Bridger, 1979).

PRE-COURSE PHASE

This consists of two operations. In one nominations are submitted from constituent parts of the company of those managers who wish to attend. Invitations are sent by the Management Development Adviser (MDA), setting out the purpose and indicating prior work to be done. In the other, the MDA appoints the course staff and meetings between them are subsequently held two or three weeks before the residential phase.

NOMINATION AND METHOD OF INVITATION

Each participant attends voluntarily. He is free to withdraw at any stage. Invitations are sent on the basis that each participant

- has within the scope of his or her management function sufficient opportunity to influence change in methods of working
- has the motivation to undertake fresh approaches to work and to explore problems without pre-conceptions
- is resilient enough to absorb conflicting pressures and to react with sensitivity.

The description of the course states its purpose as follows:

These courses . . . are designed to enable managers to gain, through participation in group exercises and discussion, a fresh insight into management and to derive general principles and practice from particular experiences. The content

emerges from members' interests. No attempt is made to teach hard and fast techniques but rather to encourage learning by participation in joint work, aided by the presentation of theoretical concepts.

The phrasing indicates the duality of task; that through a discussion of management topics which are both valid and real, insight can not only be gained about the content of such issues, but about the processes of group activity.

The nominees are asked to bring, for discussion by heterogeneous work groups of which they will be members, subjects important to them in their roles as managers. In addition, they are asked to formulate a specific problem from their own managerial experience which can be discussed in detail within the homogeneous common interest group of which they will also be members.

STAFF SELECTION AND STAFF MEETINGS

The responsibility for inviting people to take part as staff members in the PMCs rests with the MDA, assisted in this task by the Tavistock Consultant. The increased numbers of courses has obliged the MDA to create a network of staff assistants. The criteria for inclusion are

- a capacity to understand the motivation of people at work in groups
- sensitivity to individual and group behavior
- organizational roles that have credibility in a professional sense
- support from managers to do consultant work, whether with training or with operational groups
- experience as a participant in a PMC

To avoid any feeling that participants are undergoing a selection process for becoming trainee consultants, individuals are encouraged, on later reflection about the course and its impact upon them, to appraise themselves. In this way the initiative can be left with the individual to state whether a consultant role of this type is appealing. The invitation, ultimately, still remains within the prerogative of the MDA, following discussions with the individual.

As group work is a crucial element within the total course design, care is taken in the assignment of individual staff consultants to each group. Unnecessary inhibitions to learning are avoided by ensuring that no staff member has too close a personal or work relationship with any member of his or her group. Although an experienced consultant can work singly with a group of some eight or nine participant managers, it has been found advantageous to have two staff members with each group. Sometimes these are people of equal experience, in which case they work as co-trainers, but more frequently one is a trainee.

Staff meetings are held before the course assembles and have a dual purpose—in content terms, to determine the framework for the week's program; in process terms, to become acquainted with one another, to understand different roles, to recognize overtly the relevance of talent within the staff group and to agree how the work will be shared between staff members.

From the start, the differences are made clear between teaching and administrative roles. Course members will best understand the importance of role clarity in groups if the staff themselves have made a conscious effort to distinguish their own roles.

THE RESIDENTIAL PHASE

FIRST PLENARY SESSION

At the first plenary session the staff allows time for questions, however trivial these may seem, without creating an undue sense that time is an expandable commodity. The session attempts to be administratively brisk and to explain the rationale of the course design and the roles of the staff. Nevertheless, there is bound to exist, to a certain degree, a sense that participants are the victims of manipulative or even devious stratagems. With the best will in the world, and despite protestations to the contrary, the staff may fail to convince them that such is not their intention.

The course is frequently described as unstructured, not because a basic framework is lacking, but because it starts from the learners' questions, rather than from the teachers' answers. Exploration of problems about managing, about group behavior, begins with discussion between participants, so that their differing or similar experiences may be brought into the open, before any inferences about behavior in general can be drawn.

HOMOGENEOUS COMMON INTEREST GROUPS

The next stage consists of initial brief exchanges between members with a common interest, i.e., homogeneous, group.

These are trios or quartets, consisting of managers with similar roles or functions who can explore their own problems and communicate with each other in a familiar language. No staff member is present at this stage, which immediately follows the introductory plenary meeting, unless a group requests clarification. The group's task is to formulate an agenda relevant to some common interest that each can take with him to his search group. They meet again at later stages for different purposes.

HETEROGENEOUS SEARCH GROUPS*

At the core of the design are heterogeneous groups of 9 managers, which have the task of understanding how content and process are interdependent in achieving group objectives. The first of the heterogeneous group periods takes place once there has been an opportunity to share, in a further plenary meeting, the variety of managerial problems which participants have begun to discuss with each other. They now find themselves members of a group with mixed, perhaps conflicting, interests.

Thus at this stage the design has already established a replica of institutional life. The members belong to one group where they speak a recognized language; to another where they must try to understand the language of others whose ideas and backgrounds are unfamiliar; and to a total organization, represented by a plenary meeting where all participants come together to deal with matters affecting their inter-groups requirements.

ALTERNATION OF CONSULTATION AND SEARCH GROUPS

For the next two days the common interest groups (renamed consultative groups) and the heterogeneous groups (renamed search groups) function alternately. The task of the former is now concerned with learning about the giving and taking of advice between colleagues; the role of the second to undertake free exploration of problems and issues. By reason of this alternation, course members experience, in a temporary system, the conflict of interest that flows from simultaneous membership in distinct groups, and learn to sustain the two-way stretch to which they are subjected. Exactly how these different aspects of the week's course develop will be the function of the staff to observe and interpret in relation to the processes involved in managing groups. The content by means of which such awareness develops is represented by the members' own agendas, brought from their trios and quartets to the search groups.

THEORY SESSION: THE NATURE OF GROUPS

Now that each group has had some experience of handling its own discussions, a plenary period is inserted which takes the form of a theory presentation by a staff member about "The Nature of Groups." Experiences in working groups, however frustrating or uncertain their nature, precede any attempt to draw

*The idea of cognitive search was introduced by Wertheimer (1945) and developed by Fred and Merrelyn Emery (1978) at the social level for the purposes of search conferences.

together more general concepts about groups. The structure is a reflection of the wish to proceed from the known to the unknown. It supports learning by discovery. The expectation is (and experience bears this out) that the participants will relate this talk about groups in general to their own developing perceptions about what is taking place in their own groups.

Thus, about one-third of the way through the course, at the very point where members are feeling that they are lost, that the staff process observations are merely intrusive, unhelpful remarks (not germane to the content discussions), and that confusion is a dominant note, an attempt is made through the plenary presentation to enable them to see their experiences against a fresh set of concepts. There are usually feelings of manipulation, however, as if the course staff have been keeping these revelations up their sleeve.

INTER-GROUP EXCHANGE

Not only does the course aim to provide opportunities to look at small groups, it is also concerned—because management involves such experiences—to examine what happens when groups try to work and communicate with each other. About mid-way through the week, therefore, the search groups have the opportunity to share their experiences to date, by means of an inter-group exchange. Two members from each group describe and discuss with each other their separate views of what has occurred in their respective groups. This is arranged as a “fish-bowl” exercise in which representatives of groups are observed by the colleagues who have chosen them. Members have the chance to evaluate what happens when representatives are faced with conflicting feelings—loyalty to one group yet a desire to understand the attitudes of people from another. The criteria for choice of representatives are also reviewed.

REVIEW AND FIELD FORCE ANALYSIS

Underlying the initial attempts to create this type of course is a belief in the value of “suspending business” for effecting a review of organizational life. Participants have the opportunity to look back at what has been happening, to make proposals about what might happen and to come to jointly agreed decisions about what will best suit the future needs of the course as a total institution. A method for doing this is Field Force Analysis (Lewin, 1951), by use of which managers produce maps of those forces which assist and those which detract from the course objectives. It is a method that course members can use back home. This review affords an occasion to examine, with staff feedback, just how course members are proceeding with this task of managing

their own temporary institution. They look at the forces, internal and external, such as competitive pressures and drives, which make up group life. The rational, logical aspects of decision making are seen to be tempered by the irrational. It is at this stage, when awareness of process has been acknowledged, however uncertainly put into words, that the members of each consulting and search group can examine their own group's process and expect to find parallels between them and those in groups in their sponsoring organizations. The group discussions towards the latter part of the week focus on the group's own processes and dynamics. The consultant has opportunities to engage with group members about process, even to make, where appropriate, brief statements about organization theory. Papers brought to the course are best received if introduced when members can gain knowledge from them relative to points arising from the course experience itself.

FINAL STAGES

The final stages of the residential phase prepare members for return to their organizations. So the trios and quartets are reconstituted and meet immediately prior to the brief plenary session with which the course concludes. Members recall their first uncertain, tentative group meetings, and attempt to relate the intervening experience to the pressing tasks they will face beyond the confines of the course. As with a vacation, the descriptions to others not present of an experience not shared is likely to prove frustrating. How to relate again to colleagues who will be incapable of receiving with comprehension and sympathy one's inability to interpret the significance of the week's events?

The ensuing plenary session when participants and staff alike re-convene from their homogeneous groups—for consultants and observers, too, can benefit from a pause to consider jointly the future against the background of the course—is not an occasion for further public review of the groups' process. The need for business now outweighs the need for any suspension of business. On occasions, the staff find themselves giving a lead on content, whilst participants, reversing the usual roles, seem to be more concerned with process.

A practical task is provided by a brief discussion of the interim plans for a follow-up meeting, say, after six months, with the need to make arrangements, to co-ordinate dates, to consult diaries; in fact, to think immediately of that external world to which everyone now must return. Course participants, having shared in a learning experience about membership in, and management of, small groups, are about to take on more familiar roles again. And so they leave the course, as they joined it, as accountants, engineers, production managers, personnel officers and marketing managers.

POST-COURSE PHASE

The objectives in providing an occasion for course members to re-convene some six months later are:

- to evaluate the course's relevance to the roles and functions which people will have taken up again
- to re-appraise one's own performance at work and the feelings about one's career development in the light of the course
- to discover the organizational issues raised, as a result of attempting to relate "group dynamics" to problems at work

The members and staff come back to the same conference center for a period of two-and-a-half days. The temptation for the staff to concentrate on process comments, to the exclusion of any involvement in the content to be examined, has to be resisted. This brief follow-up looks back while still continuing to look forward—what is the relevance of group dynamics to problems at work? Staff and members alike share their experiences. After resuming through work groups—and thereby meeting the need to enjoy a re-union—the course members focus attention on special areas of interest. Case studies of organizational problems are carried out, frequently by new groupings made up of people who now have a new common interest. Whether individuals wish to discuss with others the self-appraisals carried out as arranged before coming to the follow-up session is left to them to decide.

The points raised relate to questions of organizational complexity back at work. Thus the relevance to this complexity—familiar and perhaps inevitable in any large multi-functional enterprise—of the Practice of Management is considered. This leads to work between course members, between members and staff, and between members of different and separate courses, in what may generally be described as "organization development."

The Consultant's Role and Functions

As these courses proceeded, features of the consultant's role emerged which may be regarded as general for all courses and workshops of this kind. I shall now review these.

STAFF CONSULTING ROLES

Staff roles, like course design, are conceived as enabling resources; in addition to the importance of what a staff member does is the way in which it is done. He or she takes different roles at different stages and in different situations: in the early trios and quartets to clarify; in the search group to be an adviser who

listens and gives feedback; in seminar activities to reinforce learning; in the small consultative groups to observe and coordinate. By differentiating between these roles from the start the consultant can show the relationship between role clarity and organizational effectiveness.

The point of a consultant's intervention in the early stages is often not perceived, as the group does not yet understand process. It finds difficulty in reconciling the consultant's process comments with its own interests in optimizing task objectives.

The consultant does not refuse to answer relevant questions (i.e., those consistent with the role), but if asked a question about content (e.g., what is your opinion about the influence of trade unions in industry upon the authority of management?) may indicate why, at that moment, the group wishes the consultant to take over their task rather than carry it out themselves.

One way in which a group may cope with uncertainty is to establish a familiar structure, which often means appointing a chairman and perhaps a secretary. There may be opposition, often unvoiced, to these moves. The consultant notes it for future reference when opposition becomes overt—usually in some rationalized form. Intervention is then designed to produce a realization that a particular structure or procedural form is not a general solution to difficulties of operational functioning. The experience can help later to determine when such a structure or procedure should realistically be brought into play. The timing of interventions is crucial, an opportunity for intervening not taken may not recur. Usually, however, the dynamics of the group behavior are repeated, though in another or disguised form.

In the later stages, the consultant has to exercise self-discipline, through recognizing the group's own growth in learning potential, so as not to intervene in the same way throughout, but allow participants to try their hand on process comment whenever they are ready to do so.

THE CONSULTANT'S RELATIONSHIP TO THE GROUP

In the early stages a consultant is liable to be the target for hostile feelings, overt or covert, because a group perceives him or her as having failed to help or lead the group. As time progresses, group members begin to distinguish between manipulating others, being manipulated and feeling that one is being manipulated. The theme of manipulation itself often becomes a means of learning about integrity, and about recognizing when one is either obliged or can choose to conform with certain circumstances. Two forces, often more, are usually involved: the urge to get on with the job in hand and the effort to provoke the consultant into "coming clean."

Later in the process the group is apt to show frustration over failure to