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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

achieve goals in content; it may want its own survival as its aim, or be reluctant to "jell" because it would become too "cosy." In various crises such as these, the group's sense of aggravation may be turned on the consultant for failure to help.

The consultant must understand and learn how best to help the group in these circumstances, for instance by suspending business to examine those factors that are determining the group's actions. Concentrating on roles ensures that the consultant is seen to be concerned only with group development and not with judgments about individual behavior. Individuals will be learning about, as well as from, each other and may begin to explore individual aspects, the consultant, however, refers to individuals and their behavior only insofar as it contributes to the group's process task.

One specific phenomenon usually occurs about one-third of the way through the course, and is associated with the underlying wish of the group as to the level of learning with which it will proceed. Critical is the group's discovery that the way forward lies in giving reflection on its own behavior as prominent a place as task achievement. Once this shift, is recognized, the consultant can assume that the group is joining him or her and beginning to show a capacity to share in the second task of looking at process as well as content. Soon afterwards the group sometimes refers to the consultant's having become a "member."

A Consultant Must "Earn the Right to be Trusted"

A consultant may wish to take notes to help remember incidents in the development of the work group. The group is likely to suspect that the notes are for other ulterior purposes, usually because of past association with authority figures displaying judgmental attitudes. No consultant can expect to be trusted as of right, but has to earn trust. Only through consistency of role, and certainly not just through the use of "techniques," will the trust of participants develop. Trust itself will come to be recognized as a process, not a state. Once, however, a "good enough" shared experience has developed, a slip out of role by the consultant may be forgiven (or may even lead to being seen as human after all), but basic discrepancies can have most damaging effects. A consultant (or manager) may grossly underestimate the penetrating and subtle sense of the "music behind the words" which groups use at all times.

Findings Derived from Review of Course Experience

Anyone who feels it desirable to do this type of work places a high value on it. One should, therefore, beware of believing that an experience of learning from

the here-and-now will be valued by everybody. The following factors influence attitude:

- Commitment to the course objectives by an individual participant, coupled with a willingness to explore, produce a positive attitude to learning
- An individual who feels he or she has been sent for some vaguely therapeutic purpose will build resistance to what is seen as an intrusive threat
- An individual whose own manager is half-hearted or highly skeptical will tend to deny the value of the experience, whatever he or she may personally feel about the method of learning
- Where a staff member displays, however unconsciously, his or her own uncertainty or anxiety about self, career or competence, this attitude transfers itself to the participants. They will display anxiety and even aggression towards the staff member and the course in general
- If a sponsoring manager's behavior belies his or her words, which may in appearance only support open-ended learning, the subordinate is liable to be guarded in his or her own behavior
- No application of learning from experience is possible in any organizational setting which exclusively rewards conformist "safe" behavior

To take these points into account membership of the course is controlled by the criteria for inclusion set out by the MDA.

Naturally, it is not possible to guarantee that course members will be paragons of influence, resilience and sensitivity. What is essential is that people, with a positive, rather than a negative approach, be encouraged to test themselves out in the temporary system of the course environment provided that they receive "back home" support for their efforts.

Evaluation

In the early courses, participants completed questionnaires on their attitudes and assumptions about management behavior. Questions based on concepts of motivation by such writers as McGregor (1960) and Herzberg (1966) were answered prior to, during and at the conclusion of the course. The purpose was to help participants examine any significant behavioral change deriving from their learning experiences. However, the anxiety of the course staff to prove the relevance of the training was greater than the participants' need to learn. The process of collecting and comparing the data took on an undue emphasis that interfered with the development of course activity, and hindered the consultants in their principal task. Questionnaires are still occasionally used, for

example, as a means of introducing a theory session. However, no formal evaluation of the courses is conducted by questionnaire. Currently, however, an attempt is being made to assess their value by means of a survey conducted with all previous participants who have assisted in the preparation of the survey material.

Because of the obvious difficulty, given the number of variables which can affect individual and group behavior in any organization, no attempt to quantify the value of the courses has been made. Significant outcomes, however, are that individuals have been able to evaluate their careers in the light of their course experience. Training managers have been able to respond to the wishes of their organizations to adopt a more open appraisal method. The need to do so arose from conversations about how relevant the learning was to factories, laboratories and commercial offices. A number of management teams, including the executive boards of two subsidiary companies, have asked for assistance from training staff in order to carry out reviews of their group's effectiveness, in the same way that work groups suspend their business in the courses. One factory, where a number of managers have attended the course and whose subordinates have similarly attended off-plant training exercises, has, through its director's initiative, set up project groups comprising people of different disciplines and functions to examine specific problems. Other parts of the company have reviewed the relationship between their objectives and their methods of work through residential conferences. As a result, they have effected their own changes.

Now that many seeds have been sown, the future emphasis in courses in the Practice of Management will be on training the trainers. The recognition of the role which a staff member can take creatively as consultant has brought new demands. It is not the intention to overlay the organization as a whole with courses in behavioral skills, but to increase the possibility of learning from real work groups, whether these be at board room level or on the shop floor.

External Workshops: The Perspective of a Participant

The courses in Philips became woven into the texture of the organization. The model was taken up by several other comparable companies. Then a demand for external courses arose in which people from different organizations could meet together and have the advantage of even greater diversity of experience, though internal preparation and follow-up could not be equivalently intensive. These workshops I have come to call Tavistock Working Conferences (TWCs). Efforts are made to ensure that the firms sending participants are supportive of experiential learning and that the interest of the participant is authentic. Preferably, two people come from any one organization.

For a number of years TWCs have been held at least annually, first in conjunction with Bath University and more recently at the conference center of the Foundation for Adaptation in Changing Environments at Minster Lovell, near Oxford. For many years, also, TWCs have been a feature of the National Training Laboratories' summer program at Bethel, Maine. They have also been held on the European continent. The composition of the membership tends to be highly international.

The best way to give a flavor of what a TWC is like is to reproduce the account of her conference experience by Eleanor Dudar, who participated in the conference held in Toronto in April, 1987. At that time she was Publication Editor of the Quality of Working Life Centre at the Ontario Ministry of Labour. It is always difficult to communicate the essence of any important personal experience verbally or in writing. It is equivalent to demanding that one should communicate the experience of the experience! As Eleanor Dudar so crisply expresses the point, "you have to be there."

The intuitive feel and understanding combined with the high professional competence which she brings to this contribution has met with much gratitude and appreciation by staff and past members who have so far had the opportunity of reading this very sensitive paper. She has captured the "music as well as the words" of the experience and, in the French translation as well as in the English original, it has already been found illuminating and valuable by those who would like to have a better indication of "what would be in it for me."

Ask people who have attended a Tavistock Working Conference (TWC) what went on, what they actually did for a week, what they got out of it, and their answers are likely to be peculiarly nebulous. Something very important took place—they'll agree to that—something at times bewildering, frustrating, positively painful even; something that in retrospect seems to have been of great positive value to their confidence and effectiveness as members of a working group; but also something very hard to put into words. "Well, you see, I guess you really had to be there."

An easier question to answer is why anyone would consider going to a TWC in the first place. Because a TWC offers help in an area where a great many people in business, industry, government, service organizations, unions, you name it, feel that help is needed. Anyone who has ever had to work in and through a group—to get something done in collaboration with six or ten or a dozen other people—knows just how frustrating and at times puzzling an exercise it can be. There are so many ways in which the productive functioning of a group can be sidetracked, highjacked, distracted and derailed by the tangle of human interactions that are woven into the agenda. Sometimes, the problem can seem pretty obvious: he simply can't grasp the issue; she simply refuses to cooperate; those two think they have all the answers; nobody wants to stick his neck out. At other times, it's by no means clear what's going wrong: the conflicts are masked; there

is an apparent willingness to work at the task; the inability to reach decisions is distinguished as further discussion. But the collective dysfunction is just as painful and unproductive. Every work group is incapacitated at times, more or less severely, by these demons, and a TWC offers a chance to discover where they lurk, and how they may be exorcised.

So, back to the first question: what actually goes on? Are you dazzled with theoretical insights from high-powered lecturers? Are you given all kinds of quick-fix do's and don'ts for the effective manipulation of your colleagues? Are these pep-talks and personal testimonies and glossy charts on organizational design? No, nothing like that. True, there is some theory along the way; conference staff offer short, pithy talks at strategic intervals—about organizations as open systems, about the need to balance the requirements of an organization's social and technical systems, about the complex nature of work group interaction. The particular issues addressed are shaped by the areas of interest indicated by the conference participants in a pre-registration questionnaire. But a TWC's primary approach to knowing how groups operate is through carefully structured participation—in groups, what else?—Experiential Learning.

What sorts of groups, and what do they do? Several kinds of groups. At the conference I attended, in April 1987 in Toronto, we began conventionally enough with the opportunity to identify with one another as members of particular "entry" groups, categorized initially by type of home organization, then by organizational position and role. In these group settings we were asked to describe the difficulties and opportunities we each faced. Everyone had something to say, and some common themes were quickly identified. In these entry group discussions we had also begun to generate, out of our shared experience, material that would serve as background for the more rigorous group work that we would be getting into. Then, at the end of the opening session, we were assigned to the two different groups that were to absorb so much of our time and thought over the next several days—the "consulting" group and the "search" group.

Dramatically different in function and practice, these two groupings formed the core of the conference experience, the one a highly methodical process with specifically defined roles for each participant, the other a setting of almost unlimited freedom to create and experiment with process itself. Each group met at least twice daily throughout the conference. A consulting group typically consisted of three or four participants, with one member of the conference staff attending each meeting. Its purpose was to permit each participant in turn to work on a real and specifically defined problem from his or her home organization. Members of the consulting group took turns at being consultant, client—the one with the problem—and observer. As consultants we had to learn how to listen, how to question, how to guide our clients to see their problems in a new light; then, as clients, how to widen our perspective on the problems confronting us, to take in the many, often disregarded, so-called external factors that exert such an intangible influence. Often, the shift in perspective gave the client new insight into where the real problem lay. Finally, but just as importantly, as observers we were learning how to see and hear what occurs in the consultative process, and to

reflect, "what would I ask at this juncture?" and "how would I respond to that?" This consultative process, an underlying feature of the conference at every turn, became a model for the way an organization can optimize the talents of its people through encouraging participation at all levels. At the end of the week, most participants agreed that the consulting group had been of real benefit in clarifying the group dynamics of the home organization. We would each be returning with a solid, carefully examined, and realistic first step to take in meeting our particular challenges.

But the heart of a Tavistock Working Conference—the most trying and the most rewarding of its experiences—must surely be the search group: seven people, with two conference staff in attendance, thrown together for several hours a day, to encounter in their purest form the turbulence and tribulation that beset a working group. Our task was, first of all, to agree upon a task—to define a collective aim for the seven participants which would contribute towards a better understanding of the issues facing organizations. Much of our time was literally spent in the elusive quest of a consensus on how to spend our time. What issue or issues could we most profitably deal with? How should we deal with them? What kind of outcome should we work towards? Put seven people together in a room—especially seven fairly dynamic individuals from a variety of upper-level positions in large organizations—and tell them to decide on something to do for a week, and you have a recipe for creative turbulence.

But there is more going on here. The other requirement of the search group was that we should periodically suspend operations on The Task (as it quickly became) in order to focus on the workings of the group itself. Like a brain attempting to think about itself thinking, the group was directed to examine its own patterns of interaction. What were the sources and axes of conflict? What was the distribution of roles in the group, between leadership and passivity, concentration and distraction, attempts to dominate and attempts to opt out? How often did the group slip into working as if still addressing The Task, but in reality evading it and allowing all sorts of sidetracking to take place? How many people were being given, or were taking, the chance to pursue their own agenda, at the expense of the collective enterprise? And how far was the group really drawing on the resources of all its members?

However absorbing our own search groups were, group learning did not stop there. Each group at the conference exists in the context of the other groups, and very quickly each begins to wonder how the others manage their time, develop their agendas, do their work. The opportunity for inter-group learning came at mid-week when we were given the task of selecting one of our members to serve as "visitor" to another group. Any method of choosing the visitor—except random selection—was allowed. The process by which we decided upon appropriate selection criteria, and upon which person best met those criteria, sharpened our understanding of how our group typically functioned. Selecting the visitor made it necessary for us to differentiate among ourselves—the activity which, in our experience, groups have the most difficulty doing—in order to choose the best person for the job (a function which, in any setting, has important implications for choosing appropriate leadership).

Selecting the visitor had a second important purpose: it turned our steady inward gaze outward to a consideration of how to relate to the external environment represented by the other group. What was that group like? Did it have any special characteristics which would make one of our members a more suitable visitor than another? What did we want our visitor to look out for and learn about in the other group? Who could we best afford to let go, while still ensuring that the incoming visitor got a worthwhile appreciation of our group?

In the role of visitor, people brought to the eddying turbulence of another group the growing clarity of vision they were developing in their own. Not immediately implicated in the struggle, they could observe with attentive detachment. The presence of the visitor had an effect, in turn, on the group being visited, prompting a degree of self-awareness in the mirror of another's observation. And on returning, the visitors brought with them a modified perspective on the environment of their own groups. Suddenly, there was hardly enough time to explore all of the day's fresh insights into our own and others' behavior. In the evening, we met in plenary session to discuss the dramatically different reactions of each group and each visitor, and to ponder the implications of our learning for similar situations in our home organizations.

The inter-group learning that resulted from selecting and sending a visitor, as well as from being visited, was an exhilarating experience. Relating thus to our immediate external environment further developed our sense of our group as a distinct entity, and increased our confidence in the work we could do together. The two kinds of learning—within the group and between groups—are clearly interactive and mutually reinforcing. A group that has some insight into its own functioning can more readily and coherently respond to the challenges of the external environment, which in turn stimulates the group to a fuller use of its own resources. This phase of the conference was especially exciting, not only because the fruits of our labors within the group were becoming evident, but also because there are so many broad applications of the manifold lessons of inter-group learning.

Because we live in a world of ever-increasing mobility of people, the business of entering and leaving groups effectively is increasingly important, for the group as well as for the individual. It is valuable to be able to go beyond simple stereotyping, to be able to gain a clear understanding of what happens in other groups—to learn how to grasp and respect the differences, but also to discern the underlying similarities common to inter-group functioning. The import of such learnings for an organization is obvious. Put into words, it can even be made to sound dull, clichéd. But the experience itself—which produced in people a new clarity about the self, the workings of the group, and the interactions between groups—is not for a minute dull or clichéd. But to really understand, you really had to be there!

To experience, in a laboratory situation as it were, the dynamics of the complex organism of a work group from inside and outside at the same time— this was the special gift of the conference. We were able, at times, both to feel what was happening in the group, and at the same time to recognize it and, together with the help of the staff members, to identify the pattern at work.

Naming the problem. Such a process bestows a sense of liberation on the participants—we do not need to be trapped so eternally by the knots in which groups entangle themselves. With an enhanced understanding of the ways in which both a group's functioning and the relations between groups may be optimized, we can actually improve a working situation—not just for the sake of the group's effectiveness, but for the well-being and fulfillments of its members considered as whole persons.

I have spoken to several fellow conference participants recently. I was struck by people's enthusiasm for the conference some three months later, and by their readiness to talk about it even while protesting that the experience was hard to communicate. While my sampling didn't elicit reports of world-shaking change, it did reveal, in all but one case, distinctly altered ways of working. One man, after many futile years of attempting to institute a new system of employee communications, has now been given the OK from his senior executive group to develop programs leading to just the kind of system he has desired. Another, an engineer by training who had recently taken a co-ordinator's job in a new manufacturing plant, found the workings of the search group to be an amazing revelation, a marvelous opportunity "to sit there and wonder what it was all about." What seemed to him at the time a privileged sort of learning seems even more so now, as he watches colleagues taking part in a team building exercise conducted within the plant by an external consultant—an exercise espousing some of the same principles of work in groups, but offering almost no opportunity for experiential learning. A chief operating officer of a large government agency felt that the conference gave her a wealth of new resources for managing her organization and for helping her to better understand and respond to her employees' needs. While it was her interest in the management of change that brought her to the conference, one of the most valuable and confirming lessons she took away was the need to live with managed complexity, an ability she thinks essential for senior people in organizations embedded in complicated external environments. The conference lent credence to her intuitive belief that attempts to simplify sometimes in fact constrain and only postpone solutions.

These were just some of the many responses that spoke of gaining a transformed understanding of the processes of work in groups. But one small fantasy has haunted me ever since the conference: what would that work group be like that consisted entirely of Tavistock initiates? Would their combined functioning be a miracle of flexible and efficient cooperation, or would they spend their entire time arguing over what aspect of group process they were actually exhibiting at that moment?

I guess you'd really have to be there.

The Socio-Ecological Setting for Double Task Management

The accelerating rate of change in social, educational, technological, economic and other fields—and, above all, the way these changes interact—has forced communities, organizations and individuals to seek a greater under-

standing of what is going on within and around them. In learning to cope with the various environments affecting them, all organizations have had to become more open to their environments. In so doing they become more exposed and vulnerable.

Staff specialties of many kinds have been introduced to help regulate open boundaries. There is increasing emphasis on consultation and on collaborative modes that manage both external and internal complexity under conditions of greater interdependence.

Just when the need has become greater for collaboration and interdependence the contradictory tendency to fall back on familiar competencies and structures has asserted itself. This paradox is a more complex issue than just resistance to change. Dealing with it involves acquiring a capability for recognizing and relinquishing valued but outmoded forms of working, while at the same time using insight to face tendencies toward rivalry and envy, which accompany a greater emphasis on interdependence.

In the highly charged environment of today, it is easier to acknowledge such a principle than to act on it. The exploration of options arouses pain, stress or impatience and can result in simplistic rationalizations. This will especially be so when change involves unlearning earlier-held values and ways of thinking and acting. In the process of unlearning those concerned must find within themselves a readiness and capability to understand and work through both conscious and unrecognized attitudes and preconceptions. These are most usefully identified and explored through the experience of examining the ways by which a system is planned, regulated and managed. Working through experiences of this kind has become a sine qua non for those who have to live and work in complex and uncertain environments.

New forms of organizational design do not inevitably result in happier or easier solutions, but rather in a different set of prices and costs, which are often a source of disillusion if their implications are not anticipated. We need to find ways of creating catalytic experiences that provide all concerned with the opportunity to unlearn old approaches and build new ones. Organizations need to develop institutional resources, both personal and organizational, for maintaining and reviewing the new state and for ensuring continuous commitment to it.

Most organizations have been managed in a form whereby the pattern of authority was clear-cut and hierarchical. The environment exercised a much smaller influence: government intervened to a smaller degree; unions had less impact; change was recognizable but less turbulent. Schools maintained their "monastic" walls; hospitals were powers unto themselves as were the professions and universities. Today government intervenes increasingly. Unions, consumers, competitors and suppliers clamor for attention. The technological explosion, and other forms of social, international and economic change impinge on all institutions. Originally, few advisers were required internally.

To help interpret and cope with growing external problems—with all their internal derivatives—far more specialists are now employed. This means that management, both now and for the future, must reconcile institutional needs and environmental forces to a much greater extent than ever before.

This is a tremendous change. Not only does one spend much of one's time and effort considering external affairs, there is the need for continuously re-educating professionals, specialist advisers and managers to ensure the viability of the enterprise.

The model of a relatively closed system is being replaced by a relatively open one (Bridger, 1980a). Subordinates manage their own environment to a greater extent. We have to learn to change from the classic family tree type of organizational structure and authority to a new form of boundary management: the management of external uncertainty and internal interdependence. Continuing this process means that erstwhile subordinates become colleagues whose commitment is required to share the accountable leader's efforts at achieving group objectives. This development can be regarded as an operational definition of participation, which differs from an older pattern of delegating tasks by separating off defined areas of work. Thus the management of complexity and interdependence is more important for today and tomorrow than are the simpler prescriptions for leadership and management on which we have been brought up. The open-system model includes the special feature of a greater network component to fulfill the control and coordination function.

The key organizational areas of competence—such as control and coordination, planning, decision making and action—demand that institutional needs and tasks, and environmental forces and resources, be reconciled to a much greater extent than ever before. What we have called the "accountable authority" has had to develop ways of working that differ from those appropriate for the earlier model. Some of these changes will show a difference in degree, others will be different in kind. For example, giving and taking advice was a **desirable** characteristic of closed-system managing; it is **essential** in open systems. In a closed system, subordinates are more concerned about minding their own shares of the "business"; in open systems they manage their own environment to a much greater extent—throughout the organization—while relinquishing (as do their superiors) relevant control of planning, decisions and actions for levels below them. Thus, the range of organizational forms has widened considerably from an almost exclusive concentration of the classic family tree type of organizational structure to various combinations of the first and second models.

A set of critical changes involved in moving from a relatively closed to a relatively open system is set out in Table 1. These changes are of such magnitude that they constitute a paradigm shift. The internal courses and external workshops described in this paper have been designed to assist organi-

TABLE I   Changes in Roles and Functions

Change from (relatively closed system)	Change toward (relatively open system)
Control and coordination retained in the superior managerial role	Control and coordination retained in superior role for policy, but shared with relevant staff for operational goals
Prescriptive tasks for subordinates with some delegated authority	Decision making and discretion devolved to relevant staff when responsible for the action involved (i.e., executive and consultative mode)
Managing mostly within the confines of the system	Managing at the boundary (i.e., reconciling external and internal resources and forces)
Allocation of jobs to persons and "knowing one's place"	More interdependence in working groups, but more anxiety about one's identity and independence
Managing to eliminate conflict	Managing the conflict by exploring its nature together
Accountability and responsibility located together	Accountability and responsibility may be separate
Single accountability	Multiple accountability
Hierarchial assessment and appraisal (often uncommunicated)	Self-review and assessment plus mutual appraisal of performance and potential
Career and personal development dependent on authority	Mobility of careers and boundary crossing for development, greater responsibility for own development
Power rests with those occupying certain roles and having high status in hierarchy	Power rests with those having control over uncertainty
Finite data and resources utilized toward building a plan	Nonfinite data and resources leading toward a planning process, maintaining a choice of direction in deciding among options
Periodic review and tendency to extrapolate (projection forward)	Control and planning requiring continuous review, prospection as well as projection forward
Risk related to an information gap	Risk related to information overload
Long term/short term based on operational plans (periodic)	Long term/short term based on continuous adaptive planning process
Concentrating on "getting on with the job" and "trouble-shooting" activities	"Suspending business" at relevant times to explore work systems and ways of working
Difficulty with "equality" and "freedom"	Difficulty with "fraternity"

zations in making this shift. They will do so only so far as large numbers of individuals within them make it in themselves.

Training in a form which models the new needs can accelerate the change process. In my view, training of the appropriate kind is an essential requirement for making the transition. For such a purpose it needs first of all to be jointly worked out by all concerned. It then has to be capable of rapid diffusion and ultimately to be carried out without consultants. There is not all the time in the world to get on with this task. It has, in fact, become urgent.

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