

LEARNING IN CONTEXT: ADULT EDUCATION AND ORGANIZATION DEVELOPMENT - A NATURAL PARTNERSHIP

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Dilemmas

Adult educators of the 21st century will find themselves in demand in a wide variety of settings. Current graduates of our Adult Education program at the Ontario Institute for Studies in Education, University of Toronto, are involved in and give leadership to international, community and organization development projects. They may be working in academia through the community colleges and universities, or using their skills as nursing educators, government employees, independent consultants, labour educators or personal counselors and coaches, to name but a few of the varied roles they play. In most of these roles, adult educators find themselves directly or indirectly involved in formal organizational life.

In fact, since the Industrial Revolution, formal organizations have been the primary site of work and workplace learning for most of the industrialized world. This sounds like a neutral statement of fact, until one considers the implications. Relentless adherence to the concepts of Scientific Management (Taylor, 1947; Gantt, 1960), Bureaucracy (Weber, 1947) and Administrative Theory (Fayol, 1949) have left a legacy of organizational forms that are tenaciously hierarchical and inflexible, unresponsive to turbulent environments and notoriously inhospitable to human creativity and learning. Gareth Morgan, in his 1986 treatise, *Images of Organization*, refers to organizations as "psychic prisons" and "instruments of domination" - and indeed, that names the experience of a majority of workers in modern workplaces across sectors throughout the world.

To this critique are added the voices of modern adult educators, who claim that by continuing to offer educational services within such traditional organizational settings, we may be "knowingly contribut(ing) to the perpetuation of an oppressive cycle" (P. Bouchard, in Scott, Spencer and Thomas, 1998, p.138). A manipulative demand for servitude from workers in the interest of increased capital; oppression caused by lack of attention to such differences as race, class, gender, and ability; a concern with empire-building and self-perpetuation by organizational leaders; indications that capitalism through globalization has "run amuck"; and inadequate (if any) attention to organizational impact on the natural environment, are just a few of the many legitimate concerns expressed by critical theorists, post-modernists, Marxists, feminists

and the others, as they examine present-day organizational life (Mills and Simmons, 1999; Bouchard, Fenwick, in Scott et al, 1998).

Unionization has attempted, with some success, to respond to the plight of the workforce, and a sizable contingent of adult educators have applied their skills and knowledge to supporting those efforts as labour educators in the workplace (Spencer, 1998; Martin, 1995). However, the essential structure and impact of hierarchical organizational design has remained largely untouched. In fact, union leaders have needed to remain attentive to not recreating a parallel hierarchy within their own structural ranks.

Alternatives in the form of cooperatives and collectives have provided more equitable models (for example the Mondragon cooperatives in the Basque region of Spain), but despite their efficacy in many cases, they have not, nor are they likely to become the norm for organizational design. One possible response is to desert formal organizations for virtual workplaces and entrepreneurial ventures. Although that seems to be viable for increasing numbers of people, the on-going need for collective coordinated effort and resource allocation, the lack of security, the imperative for unaccustomed self-direction, and financial constraints currently make this an unrealistic option for most. What, then, is the answer for millions of workers who continue to live in quiet desperation within organizations that are often physically, psychologically and emotionally inhumane? And what role might the adult educator play in responding to this question? The purpose of this chapter is to explore that issue.

The notion of learning and teaching within organizational settings is not new. Since the Industrial Revolution, training of employees in the technical skills needed for their job has been a key component of organizational functioning. Individual learning and skill enhancement continues today, both to meet job requirements as well as to help employees develop their career potential. These learning opportunities appear in a variety of forms, including designed classroom training sessions, computer-mediated distance learning or audio-teleconferencing, and the individualized use of interactive multi-media, all of which often call on the design and facilitation expertise of professional adult educators.

Additionally, team learning opportunities provide the members of a work team with skills specifically relevant to their needs, while organizational learning focuses on the strategic, systemic issues underlying an organization's ability to transform itself in the face of a turbulent, constantly changing and globally competitive environment. Margaret Wheatley (1992, p.5) says: "I believe that we have only just begun the process of discovering and inventing the new organizational forms that will inhabit the twenty-first

century". Clearly, learning is the common element in ensuring the successful functioning of such organizational forms, and in contributing to the quality of working life for their members.

Learning in the past was mainly associated with teaching in its various iterations. Usually this implied a subject-matter expert designing a training session, creating a computer program, or writing a technical manual. Learning was removed from the immediate work environment, while the facilitators of such learning experiences concerned themselves with ensuring effective "transfer" of skills and knowledge back to the work milieu. The results of these efforts have been largely disappointing. Despite highly successful classroom experiences, specific impact of training on the job has been difficult to assess, the cost often prohibitive, and the measurable outcomes almost negligible (Laiken, 1992).

Organization Development as a Response

Since the late 1960s in Canada (and earlier in the USA), the field of Organization Development (OD) has emerged as a pragmatic response to the above dilemmas. Church, Waclawski and Seigel (1999) emphasize OD's focus on helping people in organizations; however, specifying what this actually means has been an ongoing challenge for the profession.

OD methods vary widely, and although there have been consistent attempts to reach some consensus on this question (Burke, 1976; French and Bell, 1978; Weisbord, 1982; Golembiewski, 1989; Sashkin & Burke; 1990; Rothwell, Sullivan and McLean (Eds.), 1995), OD remains a difficult field to define with any accuracy. Nonetheless, the International Registry of the Organization Development Institute (1999, pp. 58-63) outlines a strong values base and code of ethics to which many OD practitioners and theoreticians would subscribe. As both an adult educator and an OD professional, I believe that the congruency of the basic values within these two fields makes organization development a natural context for the application of adult education principles and practices in the workplace.

The Shared Values of OD and Adult Education

Dozens of researchers have attempted to define "organization development" over the past thirty years (Beckhard, 1969; Patten & Vaill, 1976; French & Bell, 1978; Warrick, 1984; Burke, 1994). My own

definition contains common characteristics, but particularly stresses the mutual benefits for people and the organization, and adds the dimension of environmental context, which has not typically been included:

Organization Development is a planned and sustained change effort, using behavioural science concepts and methods, aimed at improving both the quality of working life and the organizational effectiveness of workplaces within the context of their global and ecological environment.

It is generally agreed that traditional organizations have been characterized by job monotony, under-utilization of intellectual skills and alienation of workers from the total job or production process. The overall intention of OD is to help organizations address these issues through structural redesign and/or cultural change to access the greatest potential of both social (people) and technical (work) systems. Ultimately, most OD professionals believe that creating work environments that are respectful, life-enhancing and supportive of continuous learning and creativity will benefit the individual as well as the organization.

The specific practice of OD is based on several core values, which have their parallel in the basic principles of adult education:

1. Context is a critical consideration

Because the context of organizational life has a direct impact on individual and group behaviour, the total organizational system is ultimately the focus of change - including norms, structures and modes of operation. Thus, even if the immediate focus of an OD intervention is on one sub-system of the organization, OD professionals will always frame the whole organization as the "client". They are constantly aware that change in one part of the system will eventually affect all other parts.

This principle has its parallel in adult education's notion of the "whole learner". During the same period that OD has been researched and practiced in Canada, many researchers in the field of adult education have focused on the characteristics of adult learners (for example: Kidd, 1973; Brundage & MacKeracher, 1980; Knowles, 1980; Boud & Griffin, 1987; Barer-Stein & Draper (Eds.), 1997). Dorothy MacKeracher (1996), reviews the collected research in this area, exploring such aspects as the emotional, cognitive, social, physical and spiritual characteristics of adults as learners. Understanding the learner in context is the main thrust of MacKeracher's plea to adult educators, with a similar "whole system" orientation to that of OD.

2. Client-centred orientation: people need direct involvement in making decisions affecting them

OD professionals don't see themselves as "expert consultants" entering the organization, collecting data, making a diagnosis and then writing a report with recommendations for change. Rather, their role is usually defined as that of "process consultant": helping to identify the stakeholders in any change process; providing opportunity for them to express their needs; and then collaboratively identifying ways to reach mutual goals (Fullan, Miles & Taylor, 1980; Schmuck and Runkel, 1985; Schein, 1988; Rothwell, Sullivan and McLean (Eds.), 1995). When goals are not mutual, it is the role of OD professionals to help people learn to manage differences in a way that will allow them to proceed. Although there may be times when OD practitioners will provide content expertise, ultimately, it is their intention to help the organization and its members become self-sufficient in applying OD skills and knowledge appropriately within their workplace. In the words of Schmuck and Runkel (1985, p. 10): "The chief goal for organization development is that the [organization] achieve a sustained capacity for solving its own problems".

Perhaps the most widely accepted principle of adult education is its learner-centred orientation. This approach is contrasted, as it is in OD, with an "expert" orientation in which the educator authoritatively makes all critical decisions regarding the content and process of learning, with rote memorization and one-way communication as further hallmarks of the teacher-centred environment.

Although the OD practitioner applies this principle more often within a group context, while the adult educator focuses the concept more on the individual learner, the value is the same. It places the learner or client at the centre of the process, with the facilitator in a responsive, supportive role. Additionally, both OD and adult education recognize that movement from dependence on an authority figure to interdependence with leaders and peers represents a developmental cycle. Current educational thinking acknowledges that all learners experience a range of needs along the dependence-interdependence continuum, and that moving from dependence to interdependence in adulthood is ultimately a developmental task that can be supported by a skilled professional.

3. Change is more easily affected by reducing the forces against it than by strengthening the forces for it; change can't be "sold" - addressing people's concerns/issues with a problem-solving orientation is a central focus of the work

In any change process, the orientation in OD is towards working with all of those involved with the problem in order to identify creative, feasible, mutually beneficial solutions. Within this framework, points of resistance, critiques or concerns are considered important starting points for the work of the OD practitioner. Force Field Analysis (Lewin, 1951) has been used frequently in this context as one approach which encourages all stakeholders to examine both the driving and restraining forces in organizational change. By simply acknowledging the restraining forces, in particular, such an approach values and legitimizes people's deepest concerns, and gives focused attention to these, using the ideas of those most involved in and affected by the issue.

Recently, "appreciative inquiry" (Cooperrider & Srivastva, 1987) has been developed as an alternative approach, focusing and building only on those aspects of organizational functioning that are currently effective. It is described by Bushe (1999, p.63) as "an attempt to generate a collective image of a new and better future".

In adult education, problem-focused learning is central to the learning process. Rather than beginning with content outside of the learner's experience and interest, the skillful adult educator begins with issues most relevant to the learner, and builds on these. Past experience of learners is valued as an important resource, and is the basis for transforming knowledge and skills which may be usable in the present and future. MacKeracher (1996, p. 40) says: "the fleeting present involves many conflicting concerns, needs, drives and problems. These conflicts become essential content to the learning process.

4. Social change is the overriding goal, focusing on issues of power and control

Although OD is rarely acknowledged in its own literature as having a political agenda, its emphasis on collaboration as both a process and an outcome of intervention strategies challenges the very structure and functioning of most traditional organizations. A summary of several of the values already outlined, with a few additional points, highlight:

- * the importance of involving all organizational members in making changes directly affecting them, thus challenging the primacy of management control over decision-making

- * viewing the entire organization as the client, thus challenging the assumption that the OD professional might be functioning as an "instrument of management"

* helping organizations to ultimately function without the OD professional's support, thus challenging the "expert consultant" orientation typically associated with traditional consulting approaches

* encouraging exploration of alternative organizational designs and processes that challenge the need for a hierarchical structure and its resulting "power-over" rather than "power-with" effects

* helping organizational leaders to develop leadership approaches that are facilitative, collaborative and respectful, rather than controlling, coercive and disempowering

* encouraging such approaches as "pay for performance" and team-based pay systems which challenge traditional human resource practices and status-oriented roles, and place workers at the centre of their own performance management process

* maintaining congruency in the OD professional's behaviour with all of the above values, thus holding an explicit orientation towards reflective practice.

Most OD professionals would agree that all levels of social intervention are legitimate and important, whether they be individual (therapy), organizational (organization development), community (community development) or social/global (social transformation), and that each can support the others to enhance the change process. As professional "change agents", we personally need to choose the level at which we intervene, and many of us working at the organizational level consider ourselves to be "thinking globally and acting locally". We fully expect that lessons learned in redesigned, more healthful workplaces will have an impact on the functioning of people in families, communities and the world.

Similarly, adult education historically has had a social change agenda, with a particular concern for power relations. James Draper, in an historical review of the field (1998, p.8), highlights the humanistic philosophical roots of adult education which "... focused on the dignity and autonomy of human beings. It expressed itself as a revolt against authority and developed a wholistic view of people".

Draper also refers to the progressive philosophy of adult education as "an instrument of social change", and points out that the conceptualization of adult education as "andragogy" ... "had a goal of changing the status quo, and therefore was linked to social change and liberalization" (p.22). Finally, Draper cites locations of adult education activism towards social change such as the Antigonish Movement, the Mechanics' Institute, the Banff School of Fine Arts, Frontier College and the expansion of university

extension programs (p.14), all of which have been learner-centred in their orientation, critiquing the teacher as "the keeper of knowledge", and thus reexamining the teacher-learner interaction in the light of power relations.

Current researchers in the field support Draper's historical portrait of adult education as a location of social activism with their interests in diversity and anti-racism, globalization, social practices, feminism, the labour market and labour education, lifelong education, transformative learning, environmental/ecological education, and the like. Titles such as "Educating for a Deliberative Democracy" and "Workers' Education for the Twenty-First Century" abound in modern adult education literature such as Scott, Spencer and Thomas' recent anthology, *Learning for Life: Canadian Readings in Adult Education* (1998).

How Adult Educators Can Contribute Organizationally Through OD

For adult educators wanting to offer their skills in an organizational context, the theory and practice of OD might provide a natural venue. Paul Bouchard (in Scott, Spencer and Thomas, (Eds.), 1998, p. 139) says: "[adult educators] are in a position to act as consultants both to the learners entrusted to their care and to the employer-organizations that pay for their services". Although Bouchard is specifically referring to adult educators in a training role, he notes that these professionals can effectively serve as change agents in their position, and he emphasizes holding all of the previously-outlined values in this process.

Additionally, I envision a wider berth for the applicability of Bouchard's notions. Four applications in current use will be explored briefly here, with additional references for those who would like to investigate these technologies in greater depth.

1. Action Research

One of the primary intervention processes of Organization Development is an action research approach, originated by Kurt Lewin in 1951. Briefly described, this involves data collection, feedback and analysis for the purpose of collective awareness and mutual problem-solving. It builds on the collaborative and participative values of OD, because it involves all stakeholders in designing a data collection process (and sometimes in implementing it, although the neutrality of a consultant is often preferable here); receiving uninterpreted feedback on results; analyzing data and determining priorities for change; engaging in

action-planning to create mutually acceptable strategies; implementing the plans and evaluating the outcomes, leading to continued creative problem-solving.

The role of the OD professional/adult educator is that of a "conduit" for the information from individuals (thus maintaining their anonymity) back to the member group, who then uses this information as a focus for action planning. In my experience, the need for anonymity decreases as trust in the process and in each other increases. However, there is a powerful impact in "telling one's truth" without fear of retribution or blame, and hearing one another's truths in order to work with all of the data available.

Additionally, the professional consultant facilitates the problem-solving and action-planning process, ensuring that every member has input, and that differences are openly and constructively explored. The skills required for this role are not to be underestimated, including helping a group to analyze data, set priorities, problem-solve effectively, communicate honestly, deal with differences and potential areas of conflict, and eventually design, implement and evaluate action plans that are realistic and have the commitment of everyone involved. The professional's goal is, through modelling the behaviours, to teach organizational members these very skills, so that they may continue to use action research approaches without the consultant's assistance.

Critical to this process is the concept referred to by Argyris and Schon (1978) as "double-loop learning". It involves pausing in the action component of any activity (whether it be a work team meeting, an action research change project, or an individual work activity) to reflect on the process and learn from that experience. The intention of the consultant here is to help organizational members develop skills as "reflective practitioners", who are continually learning from their own actions and those of their working colleagues.

2. Developing an organizational vision

Defining a vision of their preferred future has helped many organizations to coordinate otherwise disparate sectors. It frees individual units to function in unique and creative ways, while still maintaining organizational integrity (Senge, 1990, 1994; Field & Ford, 1995; Wheatley, 1992; Kline & Saunders, 1993). As short-term objectives, priorities, products and processes shift and change, a shared vision can help employees remained focused on longer-term organizational goals. The vision that expresses the basic beliefs and values of the organization provides an identity that informs daily action. A vision can influence recruitment and hiring practices; it can provide a framework for setting organizational unit goals

and objectives; it can offer direction during a crisis, and it can clarify and define the relationship between the organization and its stakeholders. Thus, although particular individuals or teams may function in ways that are unique to their work unit, the entire organization can be aligned by these shared values and the common purpose of their vision.

As the vision-building process is best customized to each organization's unique needs, there are many versions. However, the following components are usually involved, and are best facilitated, at least initially, by a professional consultant or adult educator (Laiken, 1998):

- * preparing, beginning with the expression of personal beliefs and hopes;
- * introducing the key concepts of creating a vision as a way of managing attention;
- * generating mutual visions from individual ones;
- * conducting a "gap analysis", determining strategic priorities and planning for action, to begin moving from the vision to reality.

Because vision statements are necessarily lofty and idealistic, they are not useful as a support for organizational change unless the ideas are eventually grounded in concrete reality and expressed as specific objectives for problem-solving. Therefore, the gap analysis explores the difference between the organization's current reality and the shared vision which members have designed, and provides a forum for creative mutual thinking about how to close the gaps between the two.

3. Collaborative Processes/Organizational Learning

Underlying both of the above-outlined OD approaches are specific processes and skills which support their intended outcomes. Three such processes have been the focus of recent research in the area of "organizational learning". Senge (1990) and Argyris (1990) refer to the discipline of reflecting on "mental models" as a way of understanding differing world views and the effect of assumptions on behaviour. Isaacs (1993), and Ellinor and Gerard (1998) propose the use of "dialogue" to surface and explore areas of disagreement or difference. Finally, Johnson (1992) offers a "polarity management" model to help organizational groups manage polarized views in their day-to-day functioning, and accrue the benefits of

member diversity. For a detailed exploration of how OD consultants or adult educators can use these three processes to help organizations develop as learning environments, see Laiken (1997).

4. Large-group Interventions

Small-group work, mainly in the form of team-building in its various iterations, has pervaded the OD landscape in the past. However, in the last decade, large-group interventions such as Future Search (Weisbord, 1992; Weisbord & Janoff, 1995), Team Syntegrity (Beer, 1994) and Open Space Technology (Owen, 1998) have become equally important in the OD professional's repertoire. Their supporters claim that they provide a forum for successfully enacting all of OD's basic values in a way that creates real and lasting change. This is contrasted to some of the large system change efforts of the past, which have often resulted in even more deeply entrenched bureaucracies, which, in the words of Weisbord (1997, p.64), are "obsessed with control, growth and economic objectives ... and tend to practice values worse than those of the people who work in them".

There are marked differences in the three approaches I have identified, mainly in the extent to which professionally facilitated structure and management is required, from Open Space needing the least amount to Team Syntegrity, the most. However, there are also several common features: they all are based on a philosophy of "together creating our reality", and the belief that it is critical for every stakeholder in this reality to be involved in its creation, or having the "whole system" in the room (Bunker & Alban, 1997). This might imply all of an organization's members and clients or customers; or, in the case of a community development project, might include interested and key members of an entire community.

In a Future Search conference, for example, two and a half to three-day meetings "bring together people across lines of hierarchy, status, function, gender, ethnicity, culture to do complex planning ... that they cannot do alone" (Weisbord, 1997, p.65). The facilitators offer no conceptual frameworks; participants are invited to contribute whatever is useful for the task at hand. Members struggle together to make sense of a vast amount of information thus solicited from the group, the only organizing structure being one of "past, present and future". Incorporating notions from other approaches such as appreciative inquiry, mentioned earlier in this chapter, Future Search emphasizes "commonalities rather than differences, what is possible rather than what is impossible ... People do their own joint analysis of the situation in a hands-on way" (Watkins and Marsick, 1993, p. 186).

Weisbord (1997, p. 66) notes that large group approaches such as Future Search, involving 60-70 people at a time, have focused "... on such diverse topics as cancer control, technologies for use by aging people, business strategy, and the rediscovery of community values" in locations all over the world.

A Partnership With a Future

It is difficult to do justice to the myriad of intervention possibilities in a field as wide-ranging as OD. However, I've attempted in this chapter to introduce the reader to some of the basic values and approaches, and how they might be used by a professional adult educator in organizational settings. For a good overview of 40 other intervention strategies, see Rothwell, Sullivan & McLean (1995).

Organization Development is an evolutionary, not a revolutionary change strategy. Those who choose to engage must be willing to commit for the long-term, often with many set-backs, and few immediate rewards. However, my 25 years in the field have provided an enlightening perspective. I see workplace learning having gained increasing momentum over the years. Organization Development, which was a fledgling field when I entered it in Canada in 1975, is now recognized both theoretically and in practice, and numbers of well-respected academic programs are offered in this area of inquiry. Almost every organization today has drawn on OD knowledge and skills, and despite the recent spate of reengineering projects resulting in down-sizing and lay-offs, many organizations are experimenting successfully with progressive approaches using OD methods. Perhaps technological advances have created an environment that is even more ripe for the "human scale" of interaction which is the hallmark of OD. Adult educators who choose an organizational context for their work will find a comfortable, if challenging, home in the partnership of adult education and Organization Development.

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