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What is This?
Transforming the A. K. Rice Institute: From Club to Organization

Debra A. Noumair¹, Barbara B. Winderman², and W. Warner Burke¹

Abstract
Initiating organization change is not nearly as challenging as sustaining and ensuring that organization change will last. This article is a historical account of the transformation of the A. K. Rice Institute from club to organization and how the challenges associated with sustaining the change were powerful enough to undermine, if not completely undo, the transformation. The transformation involved shifting the institute from having two primary missions, membership and education, to having one primary mission, education. The case is written from the perspectives of the change leader, external consultant, and past member of the board who served informally in the role of internal consultant. Collectively, the authors represent group relations and organization development traditions, and the article provides an opportunity to consider the integration, and lack thereof, of these traditions in service of organization transformation. Moreover, the post hoc analysis makes explicit lessons learned from the authors in their differentiated roles.

Keywords
A. K. Rice Institute, consultation, group relations, organization change, organization development

This is a story of organization change. Change that was planned, theory based, managed, and implemented in a thoughtful manner with each step taken being informed and supported by collected, relevant data, framed according to an organizational model proven

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through previous practice to be worthy of dealing with the realities of organization change, and imbued with competent leadership. Change did occur. Yet the change did not last, and for all intents and purposes, the organization eventually reverted to things as they once were. The whole became something less than the sum of its parts. How could this be? Principles about planned organization change after all, were followed. But, as we know, with respect to organizations, like human beings, there are individual differences.

To explain how the A. K. Rice Institute for the Study of Social Systems (AKRI) is different and the unique characteristics of the case, we have relied on both theoretical and conceptual inputs. Theoretically, we relied on the works of Bion and Lewin including open systems thinking. Conceptually, the case is informed by organizational structure, in particular, loosely coupled versus tightly coupled systems.

Although not the same age, Wilfred Bion and Kurt Lewin were contemporaries (Bion born in 1897 and Lewin in 1890). Both were profoundly affected by the rise of Hitler and Nazism. Understanding how social and system processes could produce such evil was a lifelong goal of both men. Trained in medicine as a psychiatrist and further as a psychoanalyst, Bion quite naturally focused on the unconscious. Lewin was a Gestalt and social psychologist and focused primarily on overt, social phenomena.

Originating in the United States at the Tavistock Institute, group relations (GR) was grounded in Bion’s theory of the collective unconscious. Originating in the United Kingdom at the National Training Laboratories, the T Group and subsequently organization development (OD) was grounded in Lewin’s force field theory in particular and social psychology in general. Even though both Bion and Lewin were interested in group dynamics, interpersonal relations, power, leadership, and social systems, they differed in how they studied these variables. In the case to be discussed, the change process was like imposing Lewinian thinking and approaches such as overt norms and mission/goal statements onto Bion’s followers who insisted on understanding phenomena below the surface of conscious awareness.

As this case illustrates we need to understand in more depth how to integrate in practice these two theoretical perspectives. For example, in OD language, Bion’s thinking is especially useful for diagnosis, focusing equally on what is stated by a client and what is not stated, and Lewin’s for intervention, changing norms and specific behaviors and practices. The lack of integration of GR and OD orientations alone, however, does not fully explain why the transformation of AKRI did not hold.

Organizational structure is also useful for understanding the case, particularly the ideas associated with loosely coupled and tightly coupled systems. The AKRI is a loosely coupled system, essentially a network, with little hierarchy. Within AKRI, centers in different parts of the United States differ from one another and are not exact replicas of the national organization. The attempt in the case described in this article was to tighten a loosely coupled system. As Burke (2008) has noted, we in the world of organization change and development do not yet know how to do this effectively: “How do you move effectively from a hierarchy to a network, or vice versa?” (p. 286). Using traditional OD techniques, born in the world of tightly coupled systems, to change
a loosely coupled system, may not work well. After all, much of OD work over the past half century has been to loosen tightly coupled systems. However, regarding loosely coupled systems and how to change them, Weick’s (2001) thinking has been especially instructive. For example, he stated that change in loosely coupled systems should be more improvisational than planned. This is a case of planned change that worked only temporarily. As shown in more detail in the Discussion section, a number of Weick’s principles were not followed.

Prologue to the Case

The transformation of AKRI involved shifting the Institute from having two primary missions, membership and education, to having one primary mission, education. The focus of the change process was mission and strategy, governance and leadership, and culture and is considered revolutionary as opposed to evolutionary, change (Burke, 2008). As such, deep structure (Gersick, 1991) was affected and resistance to the changes was strong (Burke, 2008). Although we have titled the article “Transforming the A. K. Rice Institute: From Club to Organization,” a more apt title at this juncture might be “Transforming the A. K. Rice Institute: From Club to Organization Back to Club.” Club is used to describe the membership mission of the Institute and organization to describe the educational mission.

The case is organized chronologically beginning with 1991 and according to the phases of leading organizational change as defined by Burke (2008): Pretransformation (Prelaunch), Transformation (Launch), Stabilization/Implementation (PostLaunch: Further Implementation), and Backlash (not one of Burke’s phases but included as a unique phase of the AKRI transformation). We elaborate on aspects of the Institute’s history that the first and second authors could give personal witness to and that directly influenced and informed the transformation. Sources of data include archival data, consultation to the board of directors from an external OD consultant, and the first and second authors’ lived experience in role.

The A. K. Rice Institute

In 1965, Margaret Rioch, Pierre Tourquet, and Ken Rice were instrumental in producing the first Tavistock (Tavi) conference in the United States. By 1970, Tavi conferences were well underway in the United States, and AKRI was incorporated as a nonprofit educational institution. In 25 years time, AKRI evolved from a small organization located in Washington, D.C. to a relatively large, loosely coupled structure that was “the national organization,” had one paid administrator, and eight “centers” located throughout the United States. The chronology of AKRI and AKRI center development is depicted in Table 1.

Using the Tavistock GR tradition of open systems and psychodynamic theories, AKRI produced GR conferences, training programs, scientific meetings, and publications for the general public through its qualified members. By 1990, membership had stabilized at about 225 volunteers, mental health professionals predominating. The modest revenue
generated from AKRI-sponsored GR conferences and publications and member dues enabled the Institute to hold an annual meeting of the board of directors and cover administrative expenses.

Transformation of the A. K. Rice Institute
Pretransformation, 1991-1997 (Prelaunch Phase)

By 1990, with the expansion and growing complexity of the structure of the Institute, there was ongoing confusion within the board of directors and membership about the mission and purpose. Was the real purpose of AKRI solely to perpetuate GR conferences? Were the real customers of the Institute its own members? There was an increased sense of fragility within the centers as public interest in experiential learning methodologies, including those found in AKRI conferences, dramatically declined in the United States, an economic recession came into play, and the political and economic climate became more conservative. Scarcity of GR conference staffing opportunities led many members to become increasingly frustrated with their respective center, casting blame at those in leadership roles for not providing them with opportunities to consult in GR conferences. A dependency culture emerged, that is, a culture whereby organization members expected security and protection from the leader; organization members behaved

Table 1. Chronology of A. K. Rice Institute for the Study of Social Systems/Center Development

<table>
<thead>
<tr>
<th>The A. K. Rice Institute for the Study of Social Systems (2002-present)</th>
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<tbody>
<tr>
<td>Centers:</td>
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<tr>
<td>The Washington–Baltimore Center, ca. 1966-2009 from AKRI</td>
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<tr>
<td>CEGO, Yale (-1973 from AKRI)</td>
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<tr>
<td>Midwest Group Relations Center, ca. 1977</td>
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<tr>
<td>North Central Group Relations Center, ca. 1975-1977</td>
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<td>Minnesota Group Relations Center, ca. 1969-1975</td>
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<tr>
<td>Topeka Center (Menninger Foundation), ca. 1969</td>
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<tr>
<td>GREX, (California), ca. 1969</td>
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<tr>
<td>SCOLA, ca. 1973-1979</td>
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<tr>
<td>The New York Center, ca. 1982</td>
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<tr>
<td>The New York Center (IASOSS), ca. 1973-1978</td>
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<tr>
<td>Institute for the Applied Study of Social Systems (IASOSS), ca. 1971-1973</td>
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<tr>
<td>The Texas Center, ca. 1971</td>
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<tr>
<td>The Central States Center, ca. 1974-1996</td>
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<tr>
<td>Chicago Center for the Study of Groups and Organizations (CCSGO), ca. 1977</td>
</tr>
<tr>
<td>Center for the Study of Groups and Social Systems (CSGSS; Boston), ca. 1982</td>
</tr>
<tr>
<td>Philadelphia Center for Organizational Dynamics (PCOD), ca. 1994</td>
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</table>

Note: Adapted from Winderman, B. B. & Hayden, C. (Chairs) (1995, May). A retrospective on the A. K. Rice Institute. Presentation conducted by the Ad Hoc History Committee of the A. K. Rice Institute at Leadership as Legacy: Transformation at the Turn of the Millennium, 12th AKRI Scientific Meeting in Washington, DC.
passively, expending no effort to satisfy their own needs, and acted as if the leader were omnipotent and omniscient (Rioch, 1975b).

The growing fragility in the centers was both a reflection and a cause of the challenges occurring at the national level. Each center elected its own director to the AKRI board. As a result, the issues residing in the centers, rather than the issues facing the Institute from the external environment, carried the board meeting agendas. In turn, because of the center-centric culture existing in the organization, an AKRI director’s authority and influence at the center level was greatly suppressed. The overarching dependency culture, unduly focused on the centers as individual entities rather than on the organizational system as a whole, exhausted the leadership efforts of those who volunteered to take up roles in governance. At the same time, threads of AKRI’s individualist, heroic culture were in play, that is, a culture whereby members were driven by an individual desire to seek status or power through their own entrepreneurial efforts within AKRI rather than a desire to give back and to serve the organization. The ongoing power struggles and issues of envy and competition between and among members, the centers, and the national siphoned energy away from the development of GR theory and methodology needed to compete with external market conditions. In the end, the board’s work was internally focused, yet many understood that AKRI would die if it did not become attuned to the external environment. Fortuitously, at the death of AKRI’s founder, Margaret Rioch, the Institute was designated as a beneficiary of her estate, the funds “to be used for such educational purposes ... as the governing body of the national organization shall determine.” Through this gift, AKRI received the founder’s funding, as well as an explicit directive, to further an educational mission.

Transformation, 1997-2003 (Launch Phase)

Risking ever-increasing entropy if AKRI did not connect to the environment beyond its current boundaries, in 1997, the board sought to transform the organization, identifying three major initiatives: to establish broad connections with the outside environment; to create a connected infrastructure, and to shift to a learning culture. AKRI launched two ad hoc committees, the Training Committee (TC) and the Strategic Planning Committee (SPC), whose work became the heart of AKRI’s change efforts and led to a proposal for a training and certification program as well as recommendations for structural change. To ensure input from all constituencies, communication channels were developed both between the center presidents and the AKRI president and between the board, the center presidents, and the chairs of the SPC and TC; center and member caucuses and surveys focused on vision, mission, and core values were conducted. The proposals from the SPC and TC seemed to generate new energy from within the membership; the experiences expressed ranged from being supportive and excited about the proposals to feeling that the organization was in danger of losing something very precious if focus was taken away from the local scene (centers). As with most change efforts, a small percentage of members remained indifferent or disengaged throughout the process. The strategic efforts of the board culminated in a membership-wide meeting in 2000. Approximately
75 members attended the meeting, engaging in an invigorating dialogue about the future of AKRI and a strengthening of the partnerships between the board, AKRI committees, the centers, and the membership. There was a sense from the majority that organizational change was not only necessary but also offered exciting possibilities for AKRI’s future; they were keenly interested in positioning AKRI such that it could work with organizations throughout the world to generate global interest in GR theory.

Many believe that organization transformations begin with a crisis, and so it was with AKRI. Immediately following Membership Meeting 2000, a crisis arose between the SPC and the board. The catalyst for the crisis was a GR conference to be produced in the United States outside the auspices of AKRI. The conference had an innovative design that targeted a corporate audience and was staffed by AKRI leaders within the SPC. Planned “under the radar screen,” it competed with center conferences and interfered with the work of the committee. Intense feelings of betrayal erupted within the board and the SPC. Whereas before the crisis it appeared that most of the ambivalence about change was coming from a few centers and a small group of members, now it was unmistakably clear that ambivalence about change was located within the leadership group as well. Understanding the limitations in moving the Institute forward, the board halted the strategic planning process and sought outside consultation.

**Working with an external consultant.** During the course of the board’s first meeting with the consultant, conflicting ideals emerged, culminating in a tipping point battle that led to the clarification of issues and the consultant’s primary interpretation. AKRI’s decreasing impact as an educational institution seemed to be because it had not been sufficiently in touch with its external world. Having dual primary missions was at the heart of this insularity. Membership issues, such as (a) the desire of members to consult in AKRI conferences and (b) the broader issues of membership per se; that is, what do we get in return for our dues, who gets selected and why, were all-consuming. Members not selected or not selected often enough to staff conferences became angry and resentful. Blame was directed at the national organization, which was perceived to be overly restrictive and limited in its decision making. The group process of conferences—learning experientially about issues of authority, leadership, individual–group interactions, and the power of the group as a whole—became the mode members and committees used to attempt to deal with AKRI itself. The real work before the Institute was often left undone because the “sexier” way of working was the conference learning process as opposed to tackling tasks and accomplishing objectives on behalf of AKRI. Confronting AKRI, the authority, was more fun than dull, time-consuming committee work (Burke, 2008).

The problem then was the dual and somewhat conflicting missions of the Institute, that is, to be a membership organization and serve its members and centers, while at the same time having an educational mission for the public at large. Membership and center issues often prevented effective accomplishment of the educational mission. To be effective at the latter, AKRI’s external environment needed to be monitored and responded to more directly, instead of indirectly via its centers and members, who were often conflicted between an individual desire to seek status or power through conference work and a desire to give back and to serve AKRI with organization needs superseding,
at least some if not most of the time, individual needs. If the organization could direct its focus primarily in support of one mission, the educational one, there would be a greater likelihood that AKRI could survive and perhaps be even more successful in the future, at least until the external environment changed again (Burke, 2008).

Once the board came to realize the disabling impact of two conflicting missions, it was able to move forward with the change process, first working with the consultant to determine which of the two missions should become primary. Voting unanimously on behalf of their constituencies (centers) to adopt an educational mission, the board began to engage the members and centers in the change process. The hope expressed to the centers and members was that in separating out the educational task from the more covert membership task, AKRI would have its energy freed up to pursue the educational mission and provide participants an identity that did not clash with the mission. As an educational institution, AKRI would be poised to leverage existing strengths and build on recent developments that had tremendous potential for furthering its mission. Although membership needs would no longer be the primary mission, the leadership envisioned an AKRI in which the educational programs would be expanded in ways that genuinely could take in a broader aspect of those who were interested in doing the work.

**Building momentum: The Transition Task Force.** A significant activity to conduct at the outset of organization change is an initiative that will capture attention, provide focus, and create the reality that the change effort now launched is not merely an exercise (Burke & Trahant, 2000). Creating the Transition Task Force (TTF) was the initiative for AKRI. As a parallel structure to the board, the TTF was charged to manage and hold the “new” AKRI as it moved through the transformation while the board managed the ongoing issues of the existing organization. The board appointed the AKRI president to serve as chair and developed a slate of candidates for the TTF, individuals throughout the organization believed to be thought leaders who were in alignment with the new mission. It should be noted that establishing the TTF as a parallel structure was not without precedence. Early examples include the experimentation at General Motors in the 1970s (E. C. Miller, 1978) and the work of Zand (1974). As Bushe and Shani (1991), Galbraith (1982), and Stein and Kanter (1980) have pointed out these parallel structures serve as antidotes to bureaucracy. In the case of AKRI, the parallel structure was more bureaucratic, a “tighter” system to serve as an antidote to the loosely coupled nature of the AKRI culture.

The TTF addressed key issues such as drafting a new mission statement and name, performing competitor analysis, building strategic alliances with other organizations, drafting new bylaws, fundraising, and governance. Feedback loops between the TTF and the board, members, and center presidents remained critical to the process. Information gained from these constituencies was used to inform the work of the TTF; in turn, the TTF relied on these mechanisms, the Institute’s newsletters, and other written communications to share their work in progress with the organization as a whole. Team-building efforts centered on getting this leadership group to work together effectively so that it could serve as a role model for AKRI’s desired culture. The TTF remained in place for 18 months and then, to sustain the change, was appointed by the existing board to be the first board of directors of the “new” AKRI. The external consultant attended each of
the meetings of the TTF and of the current board, working closely with the leaders of
the Institution until the work of the TTF was complete and the first board of the “new”
AKRI took office. As described here, the TTF functioned similarly to the parallel
organization discussed by Stein and Kanter (1980), that is, “The main task of the parallel
organization is the continued re-examination of routines; exploration of new options;
and development of new tools, procedures, and approaches. It seeks to institutionalize
change” (p. 384).

The movement forward went swiftly once the board had a clear direction. In the end,
members were asked to vote on a number of key programs, the first one being the train-
ing and certification (T&C) program. This program, tied directly to the educational
mission, was approved by a clear majority of the membership. Likewise, within a year’s
time, the AKRI membership voted to approve a new mission statement, structure, name,
and bylaws. Centers, now termed affiliates endorsed the changed structure through
signing renewable letters of agreement. These affiliate agreements, which embodied
the rights and responsibilities of centers in the “old” AKRI, allowed a shift from centers
as “center” to AKRI as a whole as “center.”

**Diagnosing organization change using the Burke–Litwin model.** The Burke–Litwin model
(Burke & Litwin, 1992) as a tool for diagnosing AKRI had significance for the Institute
because it is a well-established OD tool and a model of organization change grounded
in open-systems theory. Employing this model meant that the external consultant and
the TTF were not relying solely on the GR training model as the method to diagnose
and plan organizational change. Rather than put forward a GR interpretation, a diagnosis
based on the Burke–Litwin model guided a process that focused on the transformational
components of the model of external environment, mission and strategy, governance and
leadership, and culture.

Giving up dual primary missions actually represented a return to the Institute’s original
legal status, defined in the 1975 Certificate of Incorporation as a nonprofit educational
institution, serving at the behest of the public. At the same time, using the eight compo-
nents identified in a study by Pearce and David (1987), and demonstrated to be associated
with effective organizational performance, AKRI developed a new mission statement
and clearly established AKRI’s primary task. AKRI’s new fully developed mission state-
ment is represented in Table 2.

This mission statement was the blueprint for building a “new” AKRI. For the first
time, target customers were defined as being individuals interested in leadership and
organizations in the public and private sectors; AKRI members were no longer its target
customers. AKRI declared its interest in working with organizations throughout the
world to generate interest in GR theory and, of equal importance, addressed the need
to build successive generations of associates and learners, defined as nonassociates, to
carry out the organization’s educational mission.

**Implementation based on diagnosis using the Burke–Litwin model.** Considering factors in
the external environment such as the parallel struggle of other organizations that conducted
group training, AKRI made a number of immediate changes. By modifying its name from
the A. K. Rice Institute to The A. K. Rice Institute for the Study of Social Systems, AKRI
offered to the outside world a clearer picture of its purpose while at the same time linking its past with the present. In addition, the Institute updated its web presence to make its work accessible and relevant, and as an attempt to monitor and relate with the external environment more deliberately, three external directors were added to the board. An external relations committee was created to assure that the links between AKRI and the outside environment would remain intact. Thus, the organization developed a number of strategic partnerships with other organizations, and more focus was placed on marketing and providing online payment services for consumers. As a strategy for dealing with the loosely coupled nature of AKRI and its centers, centers became affiliates that were freestanding organizations, yet linked to AKRI through the external relations committee. Being an affiliate meant that a center could choose to either align with the educational mission of AKRI, pursue an alternative vision, or both, pursuant to the affiliate agreement.

With regard to organization design, the board in the “new” AKRI was elected by the membership at large instead of by the affiliates, thus enabling the board to focus fully on the educational mission instead of affiliate issues. The internal relations committee was created to engage the organization’s associates; capacity-building opportunities for


The A. K. Rice Institute for the Study of Social Systems is a national educational institution that advances the study of social systems and group relations. It seeks to deepen the understanding and the analysis of complex systemic, psychodynamic, and covert processes which give rise to non-rational behavior in individuals, groups, organizations, communities, and nations. Using experiential and participatory theories and methodologies which derive from the Tavistock tradition, the Institute encourages people from all walks of life to participate in its group relations conferences, research and publications, professional meetings, and training and application events. Participants have the opportunity to learn the multiple ways in which they more successfully can take up roles as leaders and followers; exercise authority and accountability; and enhance their organizations’ effectiveness.

**Target Customers and Markets**—individuals interested in leadership and organizations in both the private and public sectors

**Principal Products and Services**—group relations conferences; research and publications; and application events

**Geographic Domain**—we are interested in working with organizations and individuals throughout the world to generate global interest in using this theory base

**Core Technologies**—methods of understanding the whole group through conferences that offer “real time” experiences, application and training events

**Survival, Growth and Sustainability**—depend on building successive generations of associates and learners to carry out our educational mission

**Organizational Philosophy**—outreach to multiple sectors of society to effect social and political systems and the exploration of multiple identities

**Organization Self-Concept**—we are an educational organization

**Desired Public Image**—we want to make a difference; acting as guides for those who seek a kind of learning that will promote transformation for themselves and their worlds
associates and learners, such as the T&C program and the Leadership Institute, were fostered; the Leadership Institute was revamped to attract participants from the public sector. Recognizing itself more fully as a volunteer, nonprofit organization, AKRI created a development committee that was assigned the task of securing outside funding to support the organization’s educational programs.

In the “old” AKRI, the dependency culture dictated that the organization was owned by the board. The overall goal for leadership in the “new” AKRI was simple and straightforward: that leadership not solely rest with the board. At the same time, the leadership vision for the transformation period had to take into account two organizations operating at once—the old was fading out, the new (as embodied in the TTF) was coming into focus. The leadership goal in this instance was to drag the “old” organization to a “new” culture that would align with AKRI’s educational mission. Hiring an executive director became a priority, in part to assure continuity in the pursuit of the vision and purpose of the organization.

Transformational changes to AKRI’s mission meant that the organization’s culture had to be modified if the overall change effort was to be successful. Realizing that one cannot change culture by trying to change culture (Burke, 2011), the board began by enacting the new desired behavior. The vote in favor of the Institute’s new T&C program reflected an endorsement of major behavioral change. In the “old” AKRI, GR consultants were “anointed,” reflecting a “club”-like culture. The move to competency-based criteria for credentialing members to consult in GR conferences reflected an institution focused on education of the highest quality as its primary mission. As well, the board enacted the new culture of shifting the consumer base; it resolved that the educational programs would serve consumers primarily, not members, and continued to promote and reward those who participated in governing and administrative roles.

The vote to change membership criteria challenged AKRI’s dependency culture. Associates, required to meet certain criteria, joined the new AKRI to further the work of the organization whether as consultant, mentor, writer, teacher, or in governance. Friends, on the other hand, had no criteria for joining except for an interest in providing support to AKRI. Whether associate or friend, individuals joining the organization were expected to work on behalf of the organization, instead of the other way around. In exchange for their dues, associates were provided opportunities to participate in developing GR theory, methodology, and applications. In addition they were given a subscription to the OPUS journal, international networking opportunities through the AKRI website and member directory, and, if certified as GR consultants, they were eligible to consult in AKRI-sponsored GR conferences. For a reduced fee, associates could participate in AKRI sponsored training events, the biennial Forum, and the T&C program.

Moving through these change processes brought with it feelings of anxiety and loss throughout the organization. Thus, one of the specific aims of the 2000 membership meeting was to address these issues. Likewise, when the membership voted to approve the changes in mission and structure in 2002, the board was again cognizant of the feelings of anxiety and loss still present in the organization and addressed them through the organization’s established communications channels as well as the Institute’s first educational event, The Forum.
Stabilization/Implementation, 2004-2006
(Postlaunch: Further Implementation Phase)

It is well known that organization change is messy and does not proceed exactly according to plan (Burke, 2008), and so it was with AKRI. A number of new issues emerged, while at the same time, a number of AKRI’s old culture-defining issues remained unchanged. And, like other organization change efforts taking place at the turn of the century, AKRI’s transformation, which required increased travel expenses and the production of more revenue-generating activities and fundraising, was hard hit by forces in the external environment, namely, September 11, 2001, and the economic downturn. By this time, there was significant turnover in the board. Only a few of the directors present during the time of the transformation were still serving, and the board had opted to move forward without the services of an external consultant.

The Forum was conceived of as the first educational event sponsored by the “new” AKRI. The Forum program was informed by the idea that the primary task was in keeping with its educational mission, which was the gathering of a learning community for the purpose of learning and education. It was intentionally designed to make AKRI accessible to new colleagues while also providing AKRI members with a space to reconnect around the work. Every program decision reflected the committee’s intention to make AKRI more accessible to “outsiders” and to help AKRI stay in relationship with the external environment, in contrast to previous educational events (i.e., scientific meetings) where the emphasis was to provide a space for AKRI members to present to each other and to conduct the internal business of AKRI.

Convinced of the importance of the transformation to AKRI’s survival, the board’s primary focus remained the external environment; yet slippage did occur. For example, the Forum was inadvertently scheduled at the same time as the annual Tavi conference in the United Kingdom. In effect, although AKRI’s new mission specified an interest in working with organizations throughout the world, AKRI scheduled its premier educational event over the Tavistock Institute’s conference, the organization that was instrumental both in AKRI’s early development as well as in the development of the GR tradition worldwide. Acknowledging this discrepancy between the AKRI mission and the slippage in monitoring the external environment, the board and Forum committee worked to both understand the meaning of the discrepancy as well as figure out a way forward once it had occurred. Noting the discrepancy and finding a resolution would not have happened without a clear mission as well as strategy for the Forum, which provided a firm holding for the Forum and, ultimately, for AKRI. The result was that the first Forum of the A. K. Rice Institute for the Study of Social Systems was held on the originally scheduled dates, and according to all indicators (attendance, revenue, postevaluations) and reports, it was a highly successful meeting.

Affiliates all renewed their affiliate agreements with AKRI, yet several bargained fiercely to regain their former power. Not only was there the felt need to protect their turf, but more than a few affiliates were now holding the membership task, rather than the educational task, as their primary mission. Attendance at AKRI’s signature residential conference continued to contract in a global climate that emphasized the bottom line
over the behavioral elements of organizational life and productivity. With regard to the leadership dimension, the open election of directors to gradually replace the appointed board was completed in 2005, and the executive director was hired within the next year. As the dust began to settle, the board took stock once again of its structure, modified it, and wrote new policies where needed to improve organizational functioning in light of the educational mission.

Struggles notwithstanding, AKRI launched a number of strategic partnerships, both within the United States and abroad. At the death of one of its longtime associates, AKRI established a global community connections fund that provided scholarship support for those interested in participating in GR programs around the world. With educational priorities in view, AKRI succeeded in publishing *Group Relations Reader 3: Group Dynamics, Organizational Irrationality, and Social Complexity* (Cytrynbaum & Noumair, 2004), produced AKRI Forum 2006 and two training events, and attracted a number of trainees and mentors to the T&C program. There was a marked shift in the attitude of AKRI members and leaders alike during this time frame as evidenced during AKRI’s Forum. The Forum not only succeeded in bringing in revenue to the organization, but with the financial profit came the profit of renewed excitement and optimism—however brief—about the transformational process and AKRI’s future.

**Backlash (2006-2008)**

“Backlash,” from a sociological perspective, is thought of as a negative reaction against an innovation or to something that has gained prominence or influence. The authors would argue that the collective resentment within the organization related to AKRI’s transformation precipitated a reaction such that instead of simply allowing the organization to return to a state of having dual missions of education and membership, the board made an unprecedented shift toward making membership the primary mission of AKRI.

By 2007, the turnover within the AKRI Board was complete; none of the individuals who served on the board or the TTF during the change process were members of this leadership group, and two of the four internal directors also served in the somewhat conflicting role of affiliate president. For the first time since the board began appointing external directors, none of the external directors attended AKRI’s Symposium 2008 (previously “AKRI Forum”), the organization’s sole educational event that is open to the board, all members, and the public at large. With the external directors gaining understanding of AKRI solely through the internal directors and newly hired ED, the links between AKRI, its educational mission, and the external environment once again became obscure.

Instead of focusing primarily on the development of the educational mission in light of the evermore-challenging economic conditions of the external environment, AKRI’s president wrote that she felt pulled to expend major efforts to repair breaks and to build and rebuild relationships within the organization during her first term of office (Estabrook, 2008). Funding the position of ED became a critical issue; member dues and revenue from AKRI’s educational programs proved insufficient to support the position, and efforts...
to secure outside funding were unsuccessful. By 2008, the board concluded that advancing the educational mission as the primary mission of the Institute was misplaced and that the solution to the organization’s financial crisis was to increase dues by increasing membership size. Moreover, deciding that AKRI should return to having dual missions, if not shift to becoming a membership organization whose purpose was to serve the associates and affiliates, the board proposed a new mission and primary task to AKRI members for discussion at the AKRI 2008 Forum:

The A. K. Rice Institute is an association dedicated to advancing group relations theory and applications. Its purpose is to facilitate transformational leadership; enhance the effectiveness of individuals and organizations; and to make the world a better place. . . . AKRI’s primary task is to nurture the growth and development of group relations in the United States. (Estabrook, 2008, April 18)

Determining that AKRI resources could not sustain a full-time executive director, the ED was terminated. A new website was developed, dedicated to attracting new members by making communication among associates and affiliates easier and providing “extensive content, including data Associates wish to share about themselves and their work” (Estabrook, 2008, April 18). The publication of Speaking of Authority, AKRI’s organizational newsletter was resumed, with emphasis on the personal and professional activities and interests of individual members and affiliates. AKRI’s T&C program is greatly influenced by the board’s current policy stance regarding the hiring of conference staff. Whereas conference directors were once bound to adhere to the competency-based criteria and standards’ policy established during the transformation, the board’s stance now gives directors “more autonomy to make staff choices and give(s) them accountability for the choices they make” (Estabrook, 2008, April 18). Practically speaking, directors were now free to choose conference staff with little regard to Institute policy.

Believing that the solution to the financial issues facing the organization could be resolved by focusing on membership and affiliate needs and increasing membership size, the board pressed for a change in how associate status was to be determined. Whereas before individuals who joined the organization as associates were required to attend a residential GR conference of at least 5 days duration, with the new bylaws change, individuals can join as an associate so long as they have “participated in an experiential GR conference or equivalent education event . . . ” of any duration. Associates joining the organization under this revised criterion are no longer expected to further the work of the organization; rather, they are beckoned to join with the promise that by joining they “will enjoy additional benefits and services.” See “How to Join,” on the AKRI website (http://akriceinstitute.org/displaycommon.cfm?an=1&subarticlenbr=14). For the first time since its inception, AKRI has, for all practical purposes, no real standards for becoming a member.

In 2009, the board warned that without increasing its financial base, AKRI could no longer be sustained “in its present form” (Estabrook, 2009). The drive for increasing
membership size became ever more vital, as an anonymous donor came forward and offered to match, dollar for dollar, the incoming dues of former AKRI members who rejoined as well as those of first-time members. Educational events spawned during earlier years brought in better revenue than expected; the LI changed its theme to one more international in character. Similarly, Belgirate III, an international educational event AKRI first cosponsored during the transformation, was considered a great success. Yet apart from gaining more members and providing members with more benefits, the board is unclear as to AKRI’s direction. In a recent survey, AKRI members were asked why they decided to become members. Each of the listed reasons assume that individuals joined the organization expecting to receive benefits and services, namely, “opportunity to learn more about group relations,” “support for my professional development in group relations,” “network with other people who apply group relations,” “access to publications and other materials,” and “opportunity to be a consultant at conferences.” No categories applied to those who joined to serve the organization and further its purpose as an educational institution (Colton, 2010, January 5).

By shifting from an institution primarily focused on an educational mission, serving at the behest of the public, to a membership organization with a clear focus on recruiting and serving members and little regard for the public interest, the Institute abandoned its 1975 Certificate of Incorporation. Thus, the transformation of AKRI did not hold.

Discussion

There are multiple reasons as to why the transformation of AKRI from club to organization did not hold. In this article, we propose five contributing factors: implications of a volunteer organization; a loosely coupled system; trying to change deep structure; management of resistance to, and ambivalence about, change; and insufficient attention to integration of GR and OD approaches to organization change. Each will be discussed, and when there is a confluence, factors in concert with one another will be explicated.

Implications of a Volunteer Organization

AKRI is a volunteer organization and, for the most part, functions virtually. Managing change in an organization dependent on its volunteers became increasingly difficult, as those associates who had been active throughout the change process could no longer volunteer their time at the point where sustaining the change was critical and required continuity in leadership. Thus, the most threatening aspect of AKRI’s volunteer workforce for the success of the transformation was the lack of a far-reaching leadership succession plan that supported the original vision for change and, therefore, rendered the transformational vision unsustainable. The lack of successors pointed to the absence of widespread commitment to the transformation throughout the Institute. Those directly involved in the change process were on the TTF and the board, and although attempts were made to involve others, when it came to stepping up to leadership positions, there were very few who were willing to do so. This left a vacuum and inadvertently invited
those opposed to the transformation to occupy positions of leadership. Without strong countervailing forces, the already fragile transformation was undone.

**Implications of a Loosely Coupled System**

AKRI is a loosely coupled system and though we were cognizant of this characteristic, we viewed AKRI’s centers as part of what needed to be changed rather than intentionally designing the change process for a loosely coupled system. Furthermore, given the voluntary workforce and limited financial assets, AKRI had insufficient resources to attend fully to the loosely coupled elements that comprised the organization.

Weick’s (2001) theoretical ideas about the management of organization change with a loosely coupled system are instructive in analyzing what occurred in the change process. Some key points stand out regarding our case. For example, he stated that,

> The choice for targets for change and the success of change efforts should also be affected by the pattern of tight within and loose between. The general rule is that it is easier to produce change within than change between. (p. 386)

Working within the board was the primary emphasis in our case rather than working across and between centers, a much more difficult task. We intentionally changed the structure of the organization, locating centers (changed to affiliates) as external and offering them a choice to “affiliate” with AKRI. Since AKRI’s centers were variable with regard to their visions and functionality, we attempted a structural change rather than working more diligently with what the reality was—a very loosely coupled system. Moreover, Weick (2001, p. 390) states that “change in loosely coupled systems is continuous rather than episodic” (we focused on the latter), “small scale rather than large” (our scale was large), “improvisational rather than planned” (we emphasized planned change), “more accommodative rather than constrained” (we attempted more constraint), and “local rather than cosmopolitan” (we were more cosmopolitan).

Although our attempt to change AKRI from a loosely coupled system to a more tightly coupled one was not necessarily inappropriate, it may have been oversimplified. As Orton and Weick (1990) point out:

> Thus, the concept of loose coupling allows theorists to posit that any system, in any organizational location, can act on both a technical level, which is closed to outside forces (coupling produces stability), and an institutional level, which is open to outside forces (looseness produces flexibility). (p. 205)

They go on to emphasize the importance of the distinction between unidimensional and dialectical interpretation of loosely coupled, that is, it is dialectical. The more important question then is not whether a system is loosely coupled versus tightly coupled but what domains of the organization need to be coupled and which decoupled. With respect to changing AKRI, we assumed unidimensional rather than dialectical.
In their reconceptualization of loosely coupled systems, Orton and Weick (1990) suggest that there are three “compensations” for loose coupling. In other words, to tighten a system, emphasize (a) enhanced leadership, (b) focused attention, and (c) shared values. Regarding change at AKRI, we emphasized clearly the first two and to a lesser extent, the third. Although shared values were focused on in the 2000 membership meeting (before working with the external consultant) and with the board (while working with the external consultant), sessions with a wider group of members across the organization discussing and agreeing on (a) system values and (b) what should be tightened and what should remain loose would have been a more effective intervention than emphasizing tightening only and working primarily with the board of directors.

Different from, yet somewhat similar to the case that we present in this article, Kaplan (1982) described a consulting project with a community or network of mental health services agencies that clearly was a loose and unbounded system. Building on the work of Alderfer (1980), Brown (1980), and Weick (1976) by expanding on effective consulting practice and theories of practice, he concluded among other things that the entry stage of work with a client of this nature—a loosely organized system—is a long and protracted affair since an organization and a whole system as we tend to understand it does not quite exist. Who is the client? Who are we contracting with? Kaplan (1982) therefore surmised that “it may well be necessary to form a group capable of representing the system” (p. 430). And, finally, he further concluded that (a) feedback must fit looseness, that is, be more differentiated and limited to subunits; (b) the consultant must have consummate political and “weblike” interpersonal skills; and (c) the consultant may need to convene people more than intervene into the system.

Similarly, Lawrence and Lorsch (1967) called our attention to three key interfaces in organizations—the organization and its external environment, the relations of units within the organization, and the psychological contract between the individual and the organization. In addressing the issue of “who is the client?” in OD practice, Burke (1994), using a typical organizational chart to call attention to the boxes, stated that the client was not any of the individuals filling the boxes but the “lines” or connections between the boxes on the chart. Thus, according to Lawrence and Lorsch (1967) and Burke (1994), the client consists of relationships or the interfaces.

The larger, more encompassing theory is systems thinking. The work of Capra (1996) offers a summary that is useful in considering the AKRI case:

All living systems are networks of smaller components and the web of life as a whole is a multilayered structure of living systems within other living systems—networks within networks. (pp. 209-210)

To understand organizations, whether loosely coupled or tightly coupled, the key is to look for the interfaces, the connections between and among units, to see these relationships within the whole, but remembering at the same time that the whole is nested within a larger system and discerning the nature of that connection, and so on.
The work of the organization consultant is to embed himself or herself into the connections and interfaces and not align oneself with any particular unit. With respect to the case, the consultant may have been overly aligned with the board and insufficiently attuned to the board’s relationships with the centers/affiliates. This is noteworthy because the board, having been elected by the members, should have been a representative group as suggested by Kaplan (1982). On reflection, Kaplan’s learning may help explicate the experience of AKRI members. It may have been that AKRI members experienced the work of the consultant and the board as working “top down” and intervening into the AKRI system rather than convening members and not offering differentiated feedback to centers but only focusing on the national organization.

**Implications of Changing Deep Structure**

The transformation of AKRI was aimed at what Gersick (1991) refers to as deep structure of an organization. She contended that a change leader must convey both a sense of urgency for change and a sense of optimism. She specified the nature of revolutionary change and introduced the concept of deep structure, the core of an organization’s culture that a leader must tackle if fundamental change is to occur. In the beginning stages of an organization, choices are made (a) about who will do what and how to organize and (b) about procedures or activity patterns that will ensure the existence over time of the organization. Gersick claimed that the tenacity of these early choices is “most fateful.” The interaction among units helps make things work and reinforce the system as a whole. These units and their interacting patterns form the deep structure of an organization and last for what may seem like forever. Changing the deep structure requires a perturbation, a significant jolt to the system, in short, a revolution.

As AKRI began to form in the mid-1960s, choices were made that were “most fateful.” For example, with the event in 1965 of the first GR conference in the United States, a definitive choice was made not to duplicate the learning methods of the T Group conducted by the NTL Institute for Applied Behavioral Science and to adhere to the work of Bion, which included the notion of the group unconscious (Rioch, 1975a). Furthermore, GR in the United Kingdom was organized such that GR training and organizational consultation work were housed in the Tavistock Clinic and the Tavistock Institute of Human Relations, Centre for Applied Research; this structure allowed for GR training and organizational consultation to develop in tandem with mutual influence. As a result, systems psychodynamic organization consultation was born (Gould, 2004). When GR came to the United States, however, AKRI was formed in association with the Washington School of Psychiatry. And although organization consultation was included in its original bylaws, with time the bylaws were amended to remove organization consultation, leaving GR training as the primary focus. Thus, the primary mission of AKRI was to educate the public about group dynamics and authority relations. These clear choices were decisions that established and defined the deep structure of AKRI, and thus its culture (Rioch, 1975b).
To serve this mission of AKRI well, quality assurance regarding the deliverers of GR training was absolutely necessary. However, the assumption was that if hired to staff conferences, deliverers were deemed qualified and brought into AKRI as members. Gradually the number of members exceeded the number of conferences, and a need to serve these members with opportunities for further professional development and collegiality emerged; the membership mission began to rival the education mission. How these dual missions, membership and education, evolved and interacted established patterns of behavior and attitudes that became “most fateful.” With time, the primacy of membership began to dominate the educational mission, and AKRI became a “club,” populated with members who had been anointed rather than held to explicitly agreed-on criteria to consult in GR conferences. Thus, the deep structure of AKRI consisted, and remains today, of activity patterns that have formed the norms and values about service to members of this loosely coupled system.

When the members voted for the change, a return to AKRI’s original education mission, the change leaders believed that their efforts had been successful. With erosion of the change, however, what had looked successful with the vote may have been more like temporary compliance with no real commitment. This was surprising to the change leaders as it had been predicted that members who did not buy into the transformation would drop out of AKRI and that the Institute would consist of a smaller group of associates, all committed to a primary mission of education. Instead, resisters of the transformation remained associates and worked to reinstate membership as the primary mission. The jolt to the system was not strong enough. And perhaps with a loosely coupled system a jolt is too singular and becomes easily dispersed. It is like a bullet that when fired becomes a scattershot hitting random targets with little impact.

Management of Resistance To, and Ambivalence About, Change

Also important for change leaders is to distinguish between resistance and ambivalence (Piderit, 2000). Resistance to change is not inevitable. Some people, some of the time, embrace change. For AKRI, resistance was evident. But resistance was not the same for everyone. The work of Hambrick and Cannella (1989) helps clarify that there can be at least three different forms of resistance—(a) blind (not many fortunately, but some people will simply resist regardless of the change), (b) ideological (intellectually honest people can disagree after all), and (c) political (people believe that something of value to them will be lost—size of budget, personal income, status, etc.). For change leaders, it is important to discern what kind of resistance is being manifested: if ideological, more persuasive documentation is required; if political, it is a matter of trading or bartering short-term loss for long-term gain, for instance.

Change leaders for AKRI were probably not discerning enough about the nature of resistance they were experiencing and therefore were less than effective in dealing with it. On reflection, it seems that the primary resistance was political, that is, the transformation threatened AKRI associates with the loss of something believed to be of value to them, their identity as members of a “club” and potential opportunities to staff
conferences that brought status and prestige more than significant amounts of income. The past was idealized and there was resistance to innovation and change. AKRI change leaders were unable to convince the resisters that the benefits of becoming an organization would eventually ameliorate the loss of identity associated with being members of a club.

Sometimes organizational members may be perceived as resistant when in reality they simply are not sure about the value of changing things. In this case, perhaps, they needed time for further thought and/or they needed further persuasion to be convinced that the change was worthwhile. The change leaders for AKRI may have mistaken ambivalence for resistance and as a consequence did not patiently work harder and more closely with those who were “on the fence.” In fact, evidence for the hypothesis that there was ambivalence about the transformation can be seen in material presented throughout the case and most explicitly in the section labeled “Backlash.”

Hirschhorn (1999) offered a useful perspective in considering the impact of ambivalence on why the transformation of AKRI did not hold and, in fact, shifted from education, its original mission, to one focused primarily on membership. Hirschhorn suggested that at moments of strategic choice, organizations experience anxiety because of the ambiguity surrounding the choice and must address “the primary risk.” “The primary risk is the felt risk of the wrong primary task, that is, a task that ultimately cannot be managed” (p. 9). He suggested using the Gestalt concept of figure/ground relationships to make sense of choices organizations make. He stated:

Figure/ground relationships differ from relationships of compromise. In the latter, we blend two choices together, trying to find the optimal point. In the former, we continue to differentiate between the two choices but define a particular relationship between them. Classical Gestalt psychology suggests that when we cannot differentiate between figure and ground our perception is chronically unstable. When people cannot make one task the figure and the other ground, they are likely to fall into two kinds of errors. First, they may deny that they must make a choice, hoping in fact to strike a compromise between the two tasks therefore satisfying neither. This creates the confusion associated with an unstable figure ground relationship. Second, they may focus only on the figure, denying that the other task, however displaced from consciousness still demands attention. To use a psychoanalytic metaphor, they “repress” the ground. (pp. 10-11)

The consultant’s primary interpretation, that is, that AKRI was struggling with dual primary tasks, may have been the result of not differentiating sufficiently between figure and ground, trying to focus on both the education mission and the membership mission and not accomplishing either well. AKRI had become disconnected from its external environment (evidence of not doing the education mission well); members had become disaffected and centers were uneven in performance (evidence of not doing the membership mission well). In Hirschhorn’s (1999) terms, AKRI was operating as “chronically unstable.”

The consultant’s interpretation provided AKRI with a clear strategic choice that was surely accompanied by anxiety. By making the education mission figure and membership
mission ground, and by focusing most resources on bolstering the education mission, AKRI leaders may have repressed the membership mission. Although AKRI leaders consciously and explicitly put structures in place to address the membership mission (the internal relations committee for associates and the external relations committee for affiliates), the reality was that neither committee was very functional. At the time, these dysfunctional committees were understood as a hazard of a volunteer workforce, but in retrospect these committees may have been containing important data related to the organization’s ambivalence about the membership mission. It may have been that some within AKRI believed that the change leaders were trying to eliminate members from AKRI rather than trying to change the meaning of membership and the type of roles that members would occupy in AKRI.

Applying Hirschhorn’s (1999) perspective to AKRI retrospectively, one hypothesis is that by risking a decrease in associates (members), and a differentiated relationship to affiliates (centers), AKRI leaders may not have attended sufficiently to the experiences associated with the loss of the membership mission, instead expressing hatred of the “club.” By doing so, AKRI leaders may have cast a shadow on the primary education mission and unwittingly contributed to the split in the organization. Supporters of the transformation held to the position that there needed to be one primary mission, education, and that energy spent on nurturing the “club” would undermine the education mission. Resisters of the transformation held to the opposite position, that resources used to support the education mission were resources deprived to deserving members. Such perceived deprivation may have led to feelings of being neglected, if not abused, and eventually was injurious to the relatedness between the transformers and the resisters. In reaction, resisters of the transformation gained positions of leadership and attempted to reverse the figure–ground relationship such that membership would be figure and education, ground; instead AKRI reverted to the chronically unstable position of focusing primarily on the membership mission and functioning again as a “club.”

**Insufficient Attention to Integration of Group Relations and Organization Development Approaches to Organization Change**

GR as a body of knowledge is, in many ways, similar to OD; for example, they both deliver a consultancy product based, in part, on open-systems theory (Miller & Rice, 1967). However, despite the similarities, within the context of AKRI as an organization, some AKRI associates acted as if employing the conference training model, with its emphasis on interpretation, was the way to bring about organization change. Therefore, when AKRI intentionally hired an OD, rather than a GR consultant who would interpret unconscious processes, an exaggerated split emerged that went unexamined. To understand this split as a form of resistance, a comparison of GR and OD orientations follows. With the intention of making certain points clearly and definitively, our comparisons may be overstated. See Table 3.

**Theoretical focus.** Bion emphasized the group’s unconscious as a powerful phenomenon that influenced behavior. Lewin emphasized group phenomena as well, but more
at a conscious level focusing on norms, in particular. An OD consultant true to Lewin would take behavior at face value and operate accordingly, whereas a GR consultant would observe the same behavior and wonder what else a person was meaning but not saying. The latter individual might therefore wonder about, if not question, an OD consultant’s motives, as those who resisted the transformation did with the external consultant.

**Diagnostic focus.** It is covert versus overt. Understanding a given situation for the GR practitioner is a matter of observing behavior, then interpreting the words and actions (or silence and passivity) for deeper meaning. Understanding a given situation for the OD practitioner is a matter of asking selected questions, summarizing the responses to the questions, feeding the summary back to the client, and assuring that the client reowns the data. The diagnosis is based on what people say and observations of their overt behavior. For the GR practitioner, the diagnosis is based both on what is said as well as what is not said, but intended. The diagnosis for the GR practitioner, therefore, is based on what may be covert; an interpretation of what unconscious forces may be influencing behavior. For the OD practitioner, the diagnosis is a summary of what people report and an analysis of this reporting according to a conceptual framework, often in the form of an organizational model. A GR practitioner would find an OD consultant’s diagnosis of a social system interesting perhaps, but insufficient. Instead, a true diagnosis also addresses what is tacit and beneath the surface of what people say and how they behave. This more complete diagnosis is what resisters of the transformation may have wanted from the external consultant.

**Invisible leader.** Mary Parker Follett (1996) told us decades ago that the actual leader was, or should be, invisible. Both the leader and followers have the same ultimate leader—the purpose of the work they performed together. Many OD practitioners have found Follett’s admonition persuasive and, as a consequence, place considerable emphasis on an organization’s mission, its raison d’être or purpose. GR practitioners, to avoid slipping into a basic assumption mode of destroying the leader, follow the imperative of focusing on the task at hand. A work group, as Bion referred to it, rather than a basic assumption group, is highly conscious of the task and focuses on accomplishment of that task—to solve a problem—to make a decision, and so on. A GR practitioner might view an OD practitioner’s concentration on mission and purpose as a lofty pursuit and a “flight” from the real work that needs to be done. Thus, in AKRI, when the external consultant made the education mission salient without

### Table 3. A Comparison of a Group Relations Orientation With an Organization Development Orientation

<table>
<thead>
<tr>
<th>Comparative Dimensions</th>
<th>Group Relations</th>
<th>Organization Development</th>
</tr>
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<tbody>
<tr>
<td>Theoretical focus</td>
<td>Bion</td>
<td>Lewin</td>
</tr>
<tr>
<td>Diagnostic focus</td>
<td>Group Unconscious</td>
<td>Norms and values</td>
</tr>
<tr>
<td>Invisible leader (Follett)</td>
<td>Task</td>
<td>Purpose</td>
</tr>
<tr>
<td>Primary concern</td>
<td>Authority and authorization</td>
<td>Power and politics</td>
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...
adequately addressing the differences in how organizational purpose and task were understood, the external consultant's view seemed abstract and removed from the essential work of the organization. The resisters in AKRI lost touch with the Institute's educational mission, instead being drawn to the all-consuming issues of membership.

**Primary concern.** Bion concerned himself with leadership and matters of authority. His work led to the development of GR conferences at the Tavistock Institute, which involved creating a vacuum of authority in a small group and then observing and commenting on how participants filled that vacuum via projections of their own issues with authority. Lewin was also a student of leadership, power, and authority. Lewin's interest was "the person in context," individuals' interactions with their environments. A primary focus of Lewin's was conformity—the social norms to which people conformed plus their beliefs and values. Many OD practitioners see their work as culture change, and this was certainly true of AKRI's external consultant, who advocated culture change via an OD approach focused on overt behavior and social norms rather than on covert processes and authority relations.

In retrospect, more attention should have been paid to Schein's (2004) concept of basic underlying assumptions as the bedrock of organization culture. With this concept, Schein bridges OD and GR. He described culture as having three levels conceptually—artifacts, espoused beliefs and values, and basic underlying assumptions. Being "underlying," this third level is largely within the group unconscious of organizational members and not unlike Gersick's (1991) deep structure and, of course, similar to if not the same as Bion's theory of the group unconscious. Being an OD pioneer, Schein's (2004) concept of culture could have been a natural choice for the external consultant in this case to adopt for purposes of diagnosis of the system and feedback to the client. Operating at this level of diagnosis and intervention might have been more acceptable to the AKRI leaders than remaining with overt behavioral phenomena.

With this comparison, we have attempted to provide a partial explanation of how the failure to sufficiently integrate GR and OD, as experienced in AKRI, rendered the transformation of the Institute ultimately unsustainable. Although we acknowledge the hazards of overgeneralization and the existence of individual differences among GR and OD practitioners, from an OD perspective, we had a "clash of professional cultures," one concerned more with a group unconscious mind-set and the other concerned more with a conscious, patent mind-set. From a GR perspective, we failed to analyze the full meaning of intentionally selecting an OD consultant and the extent to which we were enamored with the OD perspective. AKRI change leaders acted as if employing an OD consultant and working within an OD framework would transform the Institute from club to organization. That is, by not making interpretations of unconscious and irrational aspects of organizational life primary and instead focusing on the conscious and rational aspects of organizational life primary and instead focusing on the conscious and rational aspects of organizational life, AKRI would begin to function as an organization, rather than as a club. It was as if AKRI change leaders tried to get AKRI to cease operating as a GR conference by denouncing the GR conference perspective. Furthermore, AKRI change leaders neglected to analyze the authority relations enacted with the external consultant. More deliberate integration of the two approaches was needed to bring about lasting
change. Moreover, AKRI needed to own that GR includes more than the conference training model; it also encompasses open systems and organizational consultancy as originated in the United Kingdom (Gould, 2004). Thus, it is ironic that the very theory on which AKRI is based (Bion, 1961; Miller & Rice, 1967), helps explain how the processes employed (or rather not employed) to lead the transformation contributed to undermining its success.

**Given What We Know Now, What Would We Do Differently If We Had to Do It Over?**

As a consequence of post hoc analysis, we have engaged in a process of differentiated discovery that is important to make explicit in order to carry forward the learning from this case. By differentiated we mean that the three authors hold different perspectives informed by their roles about what each would do differently if we had to do it over. We state these learnings in the spirit of what Mirvis and Berg (1977) wrote in *Failures in Organization Development and Change*, “Around us we see a world and a profession that worship success without an appreciation that success is often born of failure and that to learn from our failures we must nurture and support their examination” (p. vii).

If he had it to do over, the external consultant (third author) would have followed more closely Weick’s principles regarding consulting to the loosely coupled system that the A.K. Rice Institute for the Study of Social Systems was/is rather than to the more tightly coupled future state that was desired for AKRI. He certainly did not set out to violate a fundamental principle of OD consulting, that is, taking the client where the client is. His intention was to support the survival of AKRI as it was in danger of imploding. However, in retrospect, by drawing a boundary around the national organization and believing that the board was a representative group of AKRI’s centers (loosely coupled elements), and by creating a structure in which centers/affiliates were external to the organization, unwittingly he contributed to the perception that the external consultant and the board did not value the centers. Centers and members invested in maintaining the status quo of AKRI perceived this as a rejection of what was important to them—their local identities, values, norms, and ways of conducting business.

If the change leader (second author) had to do it over, she would have planned for a more protracted transformation. Although initially there was some evidence of a shift in the culture, given that AKRI was/is a loosely coupled system, a volunteer organization, and primarily a virtual organization, and that transforming the mission was a dramatic shift, she would have considered that culture change within AKRI would have taken longer than what is considered the usual time allotment, perhaps a generation rather than a few years. Knowing what she knows now, she would have viewed the various threats to the transformation as evidence of cultural lock-in. “Cultural lock-in,” as defined by Foster and Kaplan (2001), refers to the inability to change the culture even in the face of clear market threats. In other words, ways an organization deals with external threats remain the same and are ineffective. Moreover, it signals the organization’s inexorable decline into inferior performance. Thus, she would have recommended ongoing external
consultation as essential in spite of AKRI’s dire financial straits and what can now be understood as the organization’s hubris, that is, that it could maintain and nurture the transformation, and manage resistance to change on its own.

If the AKRI board member who acted informally as an internal consultant (first author) had to do it over, she would have tried more intentionally to raise awareness about what was feasible for AKRI given the external environment. AKRI, like its sister organization, the NTL Institute for Applied Behavioral Science, was/is having serious trouble making ends meet. Both organizations are experiencing waning enrollment in their programs and have been for several years. NTL struggles with considerable turnover at the presidential and board levels. AKRI struggles with an unwillingness on the part of its members to serve in leadership and administrative capacities. For both organizations, strong consensus about future steps to take appears to be difficult to reach. It may be that the era of the small experiential learning group as a freestanding training experience, at its height in the 1960s, is over. The period of the late 1940s through the 1970s is not the same psychologically and sociologically as the early 21st century. The zeitgeist has changed. Instead, learning about oneself in the context of a social system is an essential but not sole component of many academic and executive education programs. Furthermore, embedding GR training in programs designed for leadership development and strategic organization change is more responsive to what is needed in contemporary organizational life. Thus, the first author would have initiated conversations about developing a strategic partnership with an educational institution such that AKRI would benefit from being housed in a financially viable organization, and the educational institution would benefit from offering premier GR training in more contemporary forms that align with their educational offerings. In other words, rather than try and change a longstanding organization that has cultural lock-in and does not appear to be able to respond adequately to rapidly changing and powerful forces in the external environment, she would have recommended engaging a change process that would truly transform AKRI into a new entity altogether, one that is embedded in training programs that have larger missions than GR alone.

Our three perspectives are separated for the purpose of illuminating our various vantage points. Collectively, we would consider each of our different learnings and partner with each other and AKRI to do it over, knowing what we know now.

Conclusion

This case has provided evidence that maintaining organization change is far more challenging than initiating change. It has allowed an opportunity to interrogate the transformation process and identify what could have been done differently when setting up the change process, what needed to be monitored throughout the process, and how the learning achieved retrospectively can be applied to other loosely coupled systems and voluntary, virtual networks. In addition, it explicated the challenges inherent in attempting to integrate GR and OD perspectives in service of organizational transformation. And finally, the post hoc analysis revealed differentiated perspectives of the authors who collaborated in service of transforming the A. K. Rice Institute for the Study of Social Systems.
Note
The first and second authors were authorized by the AKRI Board of Directors to present earlier versions of this paper to the 2005 OPUS Conference and to the 2005 ISPSO Symposium; they were also invited by the AKRI President and Chair, AKRI 2006 Forum to present an earlier version at the AKRI 2006 Forum. Each presentation served as an opportunity to collect additional data and subsequently these data were woven into later versions of the paper. While not considered a formal method of data gathering, interacting with the external environment is an important factor in the life of AKRI and one that is addressed in more detail in the paper.

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Erratum


In the December 2010 issue of The Journal of Applied Behavioral Science, the first two sentences in the third full paragraph on page 474 incorrectly read “Originating in the United States at the Tavistock Institute, group relations (GR) was grounded in Bion’s theory of the collective unconscious. Originating in the United Kingdom at the National Training Laboratories, the T Group and subsequently organization development (OD) was grounded in Lewin’s force field theory in particular and social psychology in general.” The sentences should have read as follows:

“Originating in the United Kingdom at the Tavistock Institute, group relations (GR) was grounded in Bion’s theory of the collective unconscious. Originating in the United States at the National Training Laboratories, the T Group and subsequently organization development (OD) was grounded in Lewin’s force field theory in particular and social psychology in general.”