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Conceiving, Developing and Raising a Dynamic Learning Organization

The Massachusetts Bay Organizational Development Learning Group Story

By Jonathan Mozenter

THE MASSACHUSETTS BAY Organizational Development Learning Group, commonly referred to as the Learning Group, is a very active regional OD organization. Members not only attend meetings; they also determine the meeting topics, design, and facilitate the meetings. Energy abounds, probably because all meetings are experiential and often highly innovative. Members are open with each other during these gatherings, all in the spirit of helping each other grow as practitioners while developing and furthering the field of OD.

Typically twenty to forty people attend the monthly meetings. One hundred plus people have paid their full annual membership, and another four hundred on a distribution list occasionally attend meetings. This group is less than four years old and its co-founders, Lisa Labat, and myself were both in our mid twenties when we initiated the group.

What follows is the story of the organization we founded and the OD leadership behaviors we applied to make this vision a reality.

PRE-LEARNING GROUP

In early 1997, I was in the middle of a career transition. I had been working as an Activities Therapist at a group home where I was known for my ability to quickly develop therapeutic relationships with emotionally disturbed clients, and my capacity to create and run small therapeutic group activities.

After much introspection I felt I could help more people at one time by working on a systems level with individuals who were not emotionally disturbed. I thought organization development would be a good way to combine my business and psychology backgrounds while giving me the opportunity to apply creative problem solving to challenging situations, earn a good income, and work independently. Aggressive networking led me to believe I needed further education and more business experience. I enrolled in Boston University's MBA-Organizational Behavior program part-time and began working full-time

as a Research Associate at Mitchell & Company, a management-consulting firm.

THE PARENTS MEET

In early 1997, I attended a Greater Boston OD network (GBODN) meeting. I had been to a couple of meetings before and I had found them to be a good way to become familiar with OD, learn the language, and theoretical models, and meet the local players. I was always fifteen to twenty-five years younger than the typical person in attendance.

Upon sitting down at the meeting this particular time, I saw a young woman across from me whom I recognized from my Leadership class at BU. I introduced myself and we agreed to get together to talk about OD. The following week we met for lunch, and we talked over a pizza about our careers, our lives, and our hobbies. I enjoyed Lisa's company and it was nice to finally know someone else who was trying to break into OD. We began to attend GBODN meetings together.

Lisa Labat had gone directly from her undergraduate program to a Masters Program in Psychology at Boston University. During her time in the grad program Lisa realized she preferred to apply psychology on an organization level, and started taking OB classes as part of her degree. Lisa parlayed her grad program into a consulting position at IBIS Consulting Group, an OD firm.

Lisa and I quickly learned that we were not only very ambitious about our careers, but we also shared a passion for learning.

APPRECIATION AS THE CATALYST

Lisa and I attended a morning GBODN meeting during the summer of 1997. This meeting was different from most meetings I had experienced. The fifteen people sat in a circle. Guests from the national ODN led a dialogue about what was going on in OD today. The facilitator asked us to take a systemic look at the topic. Lisa and I actively participated in the dialogue.

After the dialogue people stayed around, eating refreshments and networking. Several people came up to us, including the guests from the national ODN, telling us how impressed

they were with our contributions. I looked around the room during this time and noticed people were primarily gathered around us. Needless to say Lisa and I were both thrilled by the compliments and attention. GBODN Director, Tom Chase asked us if we wanted to put on a meeting for the twenty to thirty-something age group.

We soon met for lunch to design the meeting for which Tom had given us free reign. We decided our objective was to find out more about this age group. We knew we wanted the meeting to be interactive because we felt we both learned better that way. We decided that we would divide the group into two focus groups and each of us would facilitate one of the groups. After an hour we would come together as a whole to share the results of each group's discussion. Lastly, we would determine what we wanted to do with the ideas that were developed.

Fifteen people showed up at that first meeting. Thirteen were in their twenties to thirties, and two were senior practitioners. The opportunity to talk about where they were in their careers seemed to energize the group. Common themes from the focus groups included a strong desire to learn about OD, interest in practicing experiential learning, and how best to use the one resource we had—each other. People wanted Lisa and me to continue leading the effort.

Lisa and I talked about how to facilitate learning among this new small group of young practitioners every day, on the phone, via e-mail, and over lunch. During these talks we made some decisions: we wanted the group to be informal; we would not charge people who attended; we hated the twenty- to thirty-something title because we didn't want the group to be about age; and finally, we would communicate with people in the group via e-mail and in group meetings due to its convenience and low cost.

Five of us including Lisa and me, designed the first meeting on Organizational Assessment. At the session we learned about Weisbord's 6-box model, the 7-S framework, and how to collect data from a group. We asked those in attendance to contribute to a mission statement for the group, assist with a name, and provide feedback on what each one wanted to learn about.

Lisa and I were afraid no one would show up, and we were thrilled to receive more than twenty RSVPs. During the meeting the group agreed they wanted the group to be about learning, and not about age. We changed the name to GBODN Learning Group.

We developed the following mission statement:

The Learning Group strives to create a safe and supportive environment where professionals can learn and discuss topics in Organizational Development. We hope to meet the personal and professional needs of our members by providing a forum for exchanging ideas, developing OD skills, testing current skills, sharing collective experiences, and networking.

At the end of the meeting the group listed the OD subjects

AUTHOR

JONATHAN MOZENTER, an Organizational Development Specialist for the Volpe National Transportation Systems Center, is founder of the Massachusetts Bay Organizational Development Learning Group (www.learninggroup.org) and the Co-Director of its Steering Committee. He has an MBA-OB from Boston University. ► jonathan.mozenter.1999@alum.bu.edu

they wanted to learn about. I took the list and turned it into a survey that we distributed through e-mail. The returns showed us what OD topics the larger group was interested in learning. Within a couple of months, the group's reputation had grown and senior practitioners started attending the meetings. Senior practitioner Tom Matera, who supported the group from day one, joined the steering committee during the first year bringing prior experience in leading professional OD organizations.

ASPIRATIONS AND MODELING

Lisa and I talked every day via phone and e-mail. We discussed everything from big-picture strategy to day-to-day logistics, including establishing a database to collect membership information, answering member e-mail and finding locations for meetings. We soon realized that other members of the group should be actively involved in managing the group's existence and we gradually passed many of these activities over to other members.

This was very time-consuming, but for Lisa and me this tied into some of our deepest passions. This learning group would be informal, accepting everyone, and providing opportunities to practice what we were learning. We both enjoyed helping people, creating things, and being challenged. From the beginning Lisa and I received a tremendous amount of support and appreciation from our members. This validation, particularly during our vulnerable beginnings, helped provide energy to continue with the effort.

We set the tone for the Learning Group with our behavior. We brought contagious, positive energy to everything we did. We treated each member as though he/she was special. When Lisa and I received e-mails or phone calls, we were sure to answer them completely and quickly, usually on the day we received them.

When we found out about an interesting OD resource or an upcoming seminar, we immediately shared that information with our new professional community. We always made sure to pay equal attention to all our members. At our social, networking meetings I spent time talking to everyone. I accepted and valued all of our members and spent time listening as people told me what was going on for them, and how they were experiencing the learning group. I have my parents to thank for my valuing of others and my careful attention to people's needs.

They were both social workers who always treated my siblings and me as equals. What a gift and model it was to have them spend lots of time attentively listening to each of us.

LEARNING GROUP DESIGN

Our group structure consists of two co-chairs who work collaboratively to form a six-member steering committee. The steering committee ensures that the group vision and mission become reality, while also attending to essential activities such as communication, accounting, and database management. Members contribute to these and other activities. For example original steering committee members Sharon Farinacci and Kathleen Lis Dean helped with the welcoming letters and the marketing materials.

A planning committee of two to six volunteers is responsible to design and facilitate each meeting, find the location, bring the food, and create resource packets. One of the planning team members is a steering committee liaison. The liaison guides the planning team as needed while ensuring consistency and synergy with the rest of the Learning Group.

From the beginning, the group has always been about listening to the members, and being as member driven as possible. While in the first year we conducted a survey to determine topics, in our second year and beyond we

developed unique "You Define" meetings. In January 1999, we invited the membership to write their personal learning needs for the year on Post-It® notes. Then we rearranged and organized them into groups so people could choose the teams they thought would most energize them. The teams get together to develop meeting programs throughout the year. Topics that came from these meetings included process consultation, dialogue, marketing OD, and OD and the new economy.

FEEDBACK, REFLECTION, AND RISK TAKING: A DYNAMIC TRIO

Creating the organization from scratch was a giant risk for Lisa and me, since we had never done anything like this before. Time and time again we plunged into the unknown. Before the Learning Group, I had never run a large organization, nor had I

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planned or facilitated a professional meeting. After each risk, we always took time to have group reflection about what went well, and what we could have done differently. At the end of each meeting we would ask for feedback, using either a feedback form, doing a plus delta, or asking for feedback via e-mail or online.

For us the learning never stopped. We would take this feedback and incorporate it in our next meeting. This set of behaviors made it ok to NOT succeed. Achieving the Theoretical Best Practice on the first try was never expected, but learning was, so we could move closer to the best practice in the future. Lisa and I collected lessons learned from planning and facilitating meetings and turned them into meeting guidelines for the planning teams who assisted with creating and facilitating the meetings. The behaviors that we modeled from day one have become the norms of the group.

Several factors have made the Learning Group a safe place to take risks. Lisa and I modeled risk-taking behavior over and over again. We were accepting of everyone. When people did make errors we did not chastise them but instead, we focused on how they could do better next time, and we pointed out ways they were successful. We practiced Appreciation. Informally, we showed appreciation to all who helped with a simple "Thank You" and a specific expression of how we appreciated them. Formally, we handed out monthly recognition awards to those who made significant contributions.

ASKING FOR HELP

It is a common experience to see people in the Learning Group show their vulnerable side and ask for help. Creating the Learning Group was challenging and Lisa and I often found that we were unsure of how to proceed. Both of us had a number of mentors in the group as well as through networking, school, and work. Many of these were senior practitioners from whom we wanted to learn. Asking these senior practitioners for help was a great excuse to talk with them while simultaneously helping us solve our problems.

USE OF TECHNOLOGY

Lisa and I both are avid computer users and we leveraged

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this skill in creating the learning group. We did all our non-meeting communicating with the group via e-mail. We had no money, so it was great to have a no-paper policy! Later, with significant contributions from learning group Steering Committee members Jim Ritscher and Nicole Merrill, we created a web page, www.learninggroup.org. Not only does this site enhance communication, it also serves as a warehouse of knowledge accumulated during the history of the group: lists of OD websites, lists of OD list servs, list of OD books, and notes from all of our meetings.

COLLABORATIONS

The innovation within the learning group is primarily a result of a diverse set of members collaborating toward a common goal. One of the most memorable projects was an interactive play on process consultation. A group of ten people worked on this project for seven months. In another project, I collaborated with current Steering Committee member Christopher McMullen to use the film Princess Mononoke as a case study on OD. We also did Open Space meetings during our first and second years, and in another meeting members had twenty minutes to model an OD technique they often used.

INTIMACY AT THE TOP

During the early days of forming the group, Lisa provided me with feedback about our interactions. We had many in-depth conversations as we worked through conflict and different styles. I learned a lot about myself through these conversations and other experiences as leader of this group.

In the beginning I was not very trusting of others, and as a result I appeared controlling at times. I learned not every one shared my approach to issues, and when their ideas didn't meet my expectations I was often critical. Lisa provided me with feedback about this, privately and during meetings. I recall Lisa being very sensitive and accepting of others' views and ideas. She would always make sure the whole committee made decisions when I wanted to make them with just her.

I have since learned to be more tolerant, and I realize that quality is subjective. I feel I have moved to more of a collaborative leadership style. This feeling was validated when a co-leader commented, "He is not that bad anymore" when

responding to an inquiry about my controlling tendency.

On the other hand, Steering Committee members awarded me with the “Star Trek” award for being willing to go where no man has gone before, and I was told that I had a unique ability to balance the human side of business with a results orientation.

EMPOWERING NEW LEADERS

Leading within the Learning Group is an excellent way to develop one’s organization development and project management skills. Members who have energy for a subject are encouraged to make their vision a reality. The steering committee gives these members the support they need. For example, in one of the more successful ventures, Sue Taylor was trying to move from line management to career counseling. She took over facilitating the OD Jobs subgroup and parlayed the experience into a new job as a career counselor at Harvard. Jim Murphy had a desire to develop his OD skills in a creative manner. He got involved in creating and organizing many of our special interest subgroups which meet monthly: OD Consultants Group, OD Book Club, and the Dialogue Group.

THE OD PRACTITIONER AS A LEADER

In pioneering this effort I have become aware of how crit-

ical it is to first understand your own passions so you can turn them into a vision. Then you need to model the aspired vision with enthusiasm. The behaviors that you model will become the culture. Sustaining the vision requires the development of structure, systems, and processes that align different organization dynamics. Some of the characteristics of the Learning Group culture are reflection, passion for learning, experimentation, support, collaboration, open-mindedness, innovation, and intimacy. Learning Group structure, systems, and processes include the “You Define” meeting, planning teams, a steering committee, special interests groups, various feedback loops, and communications.

FUTURE VISION

Learning Group now reaches several hundred OD practitioners through membership and our Web offerings. Our membership includes people from related fields: training, human resources, industrial psychology and psychology. Experience levels vary from just out of college and entering the field to seasoned veterans and experts.

I have a sense of accomplishment from bringing the group this far. I’m proud that others perceive us as demonstrating the classic features of a successful, vital professional association.

What does the future look like? I want to continue to expand our pool of expertise, refine our Web site, tailor meetings to our members’ evolving needs, encourage greater creativity, and develop a more robust volunteer system. ■