

“OD competencies are the characteristics that define successful performance by the OD professional. It delineates who ODPs need to be, what they need to know, and what they must be capable of doing.”

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# Organisation Development Core Principles, Competency, and the Way Forward?

By Mee-Yan Cheung-Judge

One can never accuse the OD field of being uninterested in professional standards, professional competency, and practice, nor for that matter, in its future viability. Ever since 1952 when the first 7 competency items were identified by NTL (Benne), through to 2016 (the last comprehensive publication on OD competencies by Cady and Shoup), and up to 2018 (when Minahan reported on how ODN USA developed the Global OD competencies), there has been persistent interest among both academics and practitioners to identify what can, and should, constitute OD competence.

During this period, over 45 researchers and authors have made significant contributions to the study of OD competencies. This is a conservative estimate as many more have propagated the concept in formal or informal gatherings, spoken in conferences, or contributed in developing various professional network standards. (see *Table 1*)

In spite of these efforts, the field still does not have any agreement as to what constitutes competent OD practitioners (ODPs) nor how to apply them.

It is time to ask are there any alternative approaches that can steer the movement forward? For what reason?

## Motivation Behind the Pursuit of OD Competencies

The case for resurrecting the competencies movement in the field currently is suffering because of the lack of consensus on this issue, and that current certificate/degree programmes are producing too

much diversity in skill sets or knowledge while the “important” areas are not being focused on.

When the field is not able to articulate the characteristics that define successful ODPs’ performance and which also differentiates the ODPs from other helping professionals, and when there is not an agreed set of competencies as our professional standards, it is difficult to have a common yardstick to develop OD talent, to guide career development, and to pursue continuous development of the field (Minahan, 2018), and ultimately give robust quality assurance to the field. Back in 1977, Weisbord talked about how we should be able to tell the genuine item from an imitation.

The following four areas (see Worley, Rothwell and Sullivan, 2010) summed up the motivation for the field to pursue what is OD competence.

### 1. For the development of the OD field:

Like any field, OD needs to establish a clear identity of its professional practices which includes delineating its primary purposes, and how those purposes can be fulfilled by stipulating the type of knowledge and skills the practitioners need to demonstrate.

### 2. To aid the design of OD curriculum:

To guide academic institutions and developers to know what sort of curricula are needed to educate and develop practitioners at different levels, as well as to guide those institutions who grant accreditation to OD academic and organizational programmes.

### 3. For the individual ODPs:

To inform newcomers to the field what is required for effective practice, and to offer continuous guidance to practitioners on what they need to do to become masterful, and which academic and development programmes will help them achieve their career goals.

### 4. For organisations who employ OD professionals:

To provide those organisations who hire both internal ODPs and external OD contractors a clear set of OD competencies that will support their processes of selection, recruitment, deployment, appraisal, and development.

### Outline of the Article

- » What is the definition of competence?
- » A review of previous efforts in establishing OD competence.
- » What may be the reasons behind why there is still not an agreed set of OD competencies?
- » What insights have we gained that will help us shape an alternative way forward?
- » What are the characteristics of an alternative way forward?
- » Who will be the key players in the alternative approach?
- » Sample list of first practical steps to kick-start this alternative approach.
- » How long will the implementation plan take place? A sample time scale.

### What is the definition of competence?

The following three definitions offers the gist of what OD competence is about:

1. “An OD competency is any personal quality that contributes to successful consulting performance. The term personality quality is to embrace areas of “self” including values, and driving principles, areas of knowledge, including fluency with relevant theories and models, areas of skills and abilities, including the requisite behaviour capacity to perform our work successfully” (Lippitt and Lippitt, 1978).
2. “Competency is an underlying characteristic of an employee (motive, traits,

skills, aspects of one’s self image, social role, or body of knowledge). Hence, competency is associated with an individual’s characteristics in performing work and includes anything that leads to successful performance and results” (Boyatzis, 1982).

3. “A well written competency statement proposes and provides an operational definition that makes the desirable behaviour more accessible to the readers, particularly those required to exhibit, assess and develop that competency. It is a clear description of KSA (knowledge, skills, ability) + attitude. The greater granularity, the more understandable and accessible it will be” (Cady and Shoup, 2016).

Summing up, OD competencies are the characteristics that define successful performance by the OD professional. It delineates who ODPs need to be, what they need to know, and what they must be capable of doing. It is a detailed description of an ideal performer.

### A review of the previous efforts in establishing OD competence.

Many efforts have been made to review the OD competencies journey since the 1950s. Table 1 lists such extensive (not exhaustive) work in chronological order.

What Table 1 shows is that the journey began with the 7 items from Benne of NTL, increased to the 83 items in twelve categories generated by a group of OD

Table 1. History of Who has Worked On and Published OD Competencies

Year	Authors	Name of the Articles/Books
1950s	Benne, K.	At NTL come up with a seven-item skill list for ODP.
1973	Partin, J.J.	Current Perspective in Organisation Development.
1974	Sullivan, R.	“Change Agent skills.”
1978	Lippitt, G. & Lippitt, R.	The Consulting Process in Action.
1979	Warrick, D.D.; Donovan, M.	“Surveying Organisation Development Skills.”
1980	Varney, G.	“Developing OD Competencies.”
1981	Shepard, K; Raia, A.	“The OD Training Challenge.”
1984	McDermott, L. C.	“The Many Faces of the OD Professional.”
1984	Neilson, E. H.	Organisation Change.
1990	Bushe, G.R; Gibbs, B.W.	“Predicting Organisation Development Consulting Competence from the Myers-Briggs type Indicator and Stage of Ego Development.”
1990	Eubanks, J.L; O’Driscoll, M.C.; Hagward, G.B. and Daniels, J.A.	“Behavioural Competency Required for Organisation Development Consultants.”
1990	Marshall, J, Eubanks, J.	“A Competency Model for ODPs.”
1992	McLean, G.; Sullivan, R.	“Essential Competencies for Internal and External OD Consultants.”
1992–2005	Sullivan, R., and others	Annually “Competencies for Practicing Organisation Development.” The International registry of organisation development professionals and organisation development handbook.

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Year	Authors	Name of the Articles/Books
1993	O'Driscoll, M.P.; Eubanks, J.L.	"Behavioral Competencies, Goal Setting and ODP Effectiveness."
1994	Church, A.H; Burke, W.W.; VanEynde, D.	"Values, Motives and Interventions of Organisation Development Practitioners."
1994	Head, T.C.; Sorensen, P.F.; Armstrong, T.; Preston, J.C.	"The Tale of Graduate Education in Becoming a Competent Organisation Development Professional."
1996	Church, A.H; Wacloski, J.; and Burke W.W.	"ODPs as Facilitators of Change: An Analysis of Survey Results."
1998	Worley, C.; Varney, G.	"A Search for a Common Body of Knowledge for Master's Level Organisation Development and Change Programmes: An Invitation to Join the Discussion."
1999	Weidner, C.; Kulick, O.	"The Professionalization of Organisation Development: A Status Report and Look to the Future."
2001	Church, A.H.	"The Professionalization of Organisation Development: The Next Step in an Evolving Field."
2001	Sullivan, R.; Rothwell, W.; Worley, C.	"20th Edition of the Organisation Change and Development Competency Effort."
2003	Worley, C.; Feyerherm, A.	"Reflections on the Future of Organisation Development."
2004	Davis P., Naughton, J. and Rothwell, W.	New Roles and New Competencies for the Profession.
2004	Davis, P., Naughton, J., Rothwell, W., and Wellins, R.	"Mapping the Future: Shaping New Workplace Learning and Performance Competencies."
2010	Worley, C.; Rothwell, W.; and Sullivan, R.	"Competencies of ODPs."
2015	Eggers, M., Church, A.	"Principles of OD Practice."
2015	Worley, C., Mohrman, S.	"A New View of Organisation Development and Change Competencies—the Engage and Learn Model."
2016	Cady, S. and Shoup, Z.	"Competencies for Success."
2016	OD Network, USA	Unveils the Global OD Competency Framework at its Annual Conference in Atlanta.
2018	Minahan, M.	Finally! Global OD Competencies.

experts and documented by Shepard and Raia (1981), reduced to a list of 67 "entry level" competencies in four categories by Varney (1988); and to 28 OD competencies from the guidance of early founders of the field, Worley and Feyerherm (2003). The Worley, Rothwell and Sullivan research (2010) produced 23 items but with 69 representative items attached to them. There was an undifferentiated long list of over a hundred items in the Rothwell and Sullivan textbook. *Appendix 1* pulled together most of the items (120) from the authors above (adapted from Worley, Rothwell, and

Sullivan, 2010). The ODN Global OD competencies have 5 dimensions, and 3 layers of description. The various lists above are not all that different, the question is how these should be used to generate competencies and their impact.

To sum up this review: (a) the field is not short of CONTENT and the various listings are not that different. While there is no consensus, there are broad agreement; (b) many colleagues in the field show great interest in establishing OD competencies but there is no agreement on how these should be used to generate what impact;

and (c) it will not be productive to focus on the WHAT? The focus now needs to be on the HOW—how to put the lists to work to create the impact the field needs.

### What may be the reasons behind why there is still not an agreed set of OD competence?

The following reasons are highlighted to help us understand as well as learn why the field still struggles to have a coherent framework for OD competencies.

1. **The field is too diverse and has many specialisations.** As an applied behavioural science field, OD is vast and diverse, both in specialisms as well as in the different levels of system work (see *Table 2* on next page for a sample list of OD specialisms and Levels of System work). Hence it is difficult to have one agreed set of competence for everyone. For example, what is useful depends on whether one is specializing in intrapersonal work (e.g., coaching) or focused on groups (e.g., group dynamic specialists doing team building, or conflict resolution), or concentrating on large scale big system change. Given this situation, the decision is whether there should be CORE areas that all ODPs should aim to be competent in on top of their specialism?
2. **Inability to manage the tension of the polarity between developmental focus or certification focus.** Among the OD community, there is tension in whether competency should be used as a developmental framework to guide individual practitioners towards mastery, or as a set of "standards" to certify practitioners in order to deem them competent to practice or not—as part of the quality assurance process. It is our inability to resolve this tension that held us up in the competence movement.
3. **Our professional associations do not have the mandate to be a quality assurance body.** In the field of OD, our professional organisations are not set up as other professions, e.g., Marketing, Accountancy or Engineering, which have been mandated by outside regulatory bodies and their own professional membership to progress and

Table 2: Sample List of Types of OD Specialism, Level of System, Scale/Size of Work, Sector Specialism.

Types of OD Specialism	Level of System Work	Scale and Size of Work	Sector Specialism
1. Coaching	1. Global scenario	1. Macro total system change/transformation programme—2–4 years duration—with multiple variables focus	1. Energy sector
2. Facilitating	2. Pan regional level work	2. Total single organisation transformation change programme—18 months, with multiple variables focus	2. Medical sector
3. Group process consultation	3. Nation state level work	3. Short term turnaround project with limited variables focus	3. Bio-science sector
4. Team building	4. Societal work	4. Short term team building and maintenance work	4. Engineer sector
5. Conflict resolution – group and individual	5. Community work	5. Small scale business improvement project	5. Pharma and vaccine sector
6. Group dynamic specialist	6. Inter-communities work	6. Build corresponding OD plan to the strategic plan—annual cycle	6. Consumer health sector
7. General consultancy work – OD cycle work	7. Whole system organisation work	7. Trouble shoot job—variables unknown	7. Professional services sector
8. Merger and Acquisition	8. Inter-whole system organisation work	8. Single assignment—one off review	8. Professional institution sector
9. De-merging	9. Organisation and sub-system work		9. Academic sector
10. Organisation design	10. Sub-system work		10. Financial service sector
11. Service improvement	11. Inter-sub-system work		11. Retail sector
12. Strategic planning and implementation.	12. Group work		12. Charity sector
13. Organisation health check	13. Intra-group work		13. Developmental agencies
14. Organisation review	14. Inter-group work		14. Start up
15. Evaluation of organisation effectiveness	15. Triad and dyad work		15. Private equity
16. Diversity, Equity and Inclusion work	16. Interpersonal work		16. Legal sector.
17. OD planning work	17. Intrapersonal work		
18. Staff survey specialist			
19. Culture change specialist			
20. Big system change work			
21. Large group work			
22. Operational process improvement work			
23. Quality improvement work			
24. Safety process improvement work			
25. System capability building programme			
26. Talent management			
27. Leadership development			

maintain professional quality. Without such formal mandate/legitimacy, our professional associations simply do not have the power to impose a “standard” set of competencies on its members. On the one hand, this provides a luxurious degree of freedom for ODPs to undertake continuous experimentation with fresh methods and novel tools, yet makes keeping track of the development of the field both challenging and confusing.

**4. The global spread of the field and its inherent diversity.** The main thrust of the OD field began in USA, and in a relatively short period has travelled widely to many places in the world, e.g., New Zealand, Australia, Mexico, Philippines, South Africa, Canada, South East Asia, Korea, various countries in Europe, UK, etc. This movement has been incredibly exciting as the early founders’ work was combined with other global community efforts in applied behavioural science yielding

an even richer interpretation of human behaviour with cross-cultural lenses. The unintended consequences of the spread is vastly different types of practice and interpretations of what OD is, and is not, what is good OD and what is not. As many know OD competencies constructed in one socio-political-cultural context may not be applicable in another context.

**5. Specialism rather than the wholistic integrity of the field takes central stage.** Most OD practitioners tend to

have stronger loyalty to their own sub-specialisation rather than to the integrity of the field as a whole. The lack of loyalty to the “whole” field affects (a) our inclination to collaborate, and (b) our willingness to engage in constructive dialogue to figure out what is core to bind us together, where are we truly different, and how should we live with both. Worley and colleagues (Worley, Rhodes, Feyerherm, 2020) have recently written a sharp critique on how the fragmentation of the field into diverse specialities has compromised the integrity of OD as a system-wide application as OD was meant to be an integrated, end-to-end, development experience leading to learning, improved capacity for change, and increased effectiveness.

- 6. Unwillingness to work with the creative side of conflict.** Most practitioners are aware that an externally imposed certification route will be a treacherous one because there will be disagreement as to: (a) who has the right to set the definitive standard, (b) who has the power/authority to decide what “credible and trustworthy” institutions should act as “assessment centres,” and (c) who will be “heavy weight” enough to staff them—i.e. who will be qualified to vet other practitioners? The off balance between diversity in practice and loyalty to the integrity of the field has been so out of kilter that prevents us from building coherency, and we are “stuck.”

**What insights help shape our thinking on an alternative way forward?**

The insights from two sets of conceptual frameworks: Polarity Management and core OD intervention values and practice principles gave us some insights as to how to unstick this situation.

In trying to understand where the tension lay, the following polarity pairs have been mapped that will need managing if we are to find a way to implement any OD competencies standards.

Tightly bounded	Loosely bounded
Externally enforced	Internally induced
Prescribed processes	Flexible processes
Institution led	Individual led
External quality assurance	Internal quality assurance
Single source quality assurance	Multiple sources of quality assurance
Focus on standardization	Focus on continuous learning
Outside certification process	Self-assessment process
Imposed Field standard OD competence profile	Self-constructed individualised OD competence profile
Single agency led	Multiple agencies partnership

To unlock the tension of the above polarities, we will need to design a way forward balancing both poles.

We also set up questions from the OD intervention criteria to offer us some insights in *Table 3* (next page).

The answers emerge from answering those intervention questions give us ideas on how to unlock the immobilised tensions from these polarities. The following proposals are set up as catalyst to evoke further ideas from colleagues who want to get this OD competence movement going.

**What are the characteristics of an alternative way forward in OD competencies?**

- 1. There will be ONE CORE set of OD competence for all.** Regardless of what speciality ODPs have, all ODPs need a core set of competencies. At the risk of generating more heat than light, I put out a sample of OD core competencies to evoke a genuine dialogue among readers as to what they personally think should be in this core set. See *Table 4* (page 17) for a sample core competence (not a definitive proposal).
- 2. There will also be a menu of other OD competencies available to help ODPs build up their mastery according to their specialty.** As mentioned, it is neither realistic nor useful to have ONE

COMPREHENSIVE set of OD competencies that all ODPs needs to have in their possession. Instead, on top of the CORE set of OD competencies, there will be a comprehensive competence menu constructed based on all the previous work done, and will be organised under specialist areas. The end product will be held electronically in OD professional organisations where individual practitioners can gain access to construct their personalised competence based on their OD specialism at their preferred LEVEL OF SYSTEM work.

- 3. The primary purpose of the use of the OD competence will, in the first 3–5 years, be on a developmental focus vs standardisation focus.** For the first phase of the movement, OD competencies should not be used in a “certifying” way. Instead, all ODPs are encouraged to experiment with building their personalised OD competence profile, getting used to working with their competence profile, not as a yardstick to evaluate their capability, but mainly as a developmental framework—guiding their own self-assessment, their development path, charting their own career path, and bringing their developmental goals into focus.
- 4. Practitioner-centric.** The above processes describe a practitioner-centric approach—putting emphasis on the process of taking up of the OD competence will be initiated and managed by the practitioner personally. ODPs are the ones who will drive their time line as to when they are ready to begin their OD competence journey, how they will construct their own competency profile, choose what development activities they will undertake, identify what type of support they will need, and determine when they are ready to undertake a more formalized self-assessment process.
- 5. OD competence movement should be backed by strong organisational infrastructural support.** All the infrastructure to accompany the individual practitioner’s OD competence journey will be supplied in the first phase by OD professional organisations and later

Table 3: *Intervention Questions for Implementing OD Competencies*

Intervention Questions:	Possible Answers:
1. Who are the primary targeted populations that need to own and use the competencies, and for what reasons?	Individual ODPs and their community – for their development
2. Whose readiness and capability will we need to focus on building so that they can take the lead in using the OD competence frameworks?	Individual ODPs and OD professional associations
3. Who are the holders and containers to support this OD competence project, especially when the targeted population is widely distributed?	OD professional associations and other related institutes globally
4. How many levels of system work will we need to engage in to ensure the transformation will happen at the systemic, group, and individual level?	Individual, groups, community, organisations, and inter-organisations
5. What systemic partnership will we need to build in order to secure the sustainability of this OD competencies uptake?	Minimally, the OD professional organisations, education institutions, and other OD development providers
6. To create a healthy momentum of this intervention, how many “entry points” will we need to make to create movement?	Minimally, 3 key entry points. Getting individual ODPs who want to develop their trade, to get academic and OD education providers who want to provide appropriate development programme for the ODP, and OD professional organisations who will host and market the competencies
7. What OD values do we need to evoke so that a sustainable result will come from those values?	<ul style="list-style-type: none"> <li>• Client-centric</li> <li>• Using group dynamics to build ownership</li> <li>• Life-long learning and development ethos being in action</li> </ul>
8. What supportive networks will we need to provide for the early adopters to maintain momentum?	<ul style="list-style-type: none"> <li>• Clear support to individual ODPs through advisors/coaches from professional associations – hence relationship-centric</li> </ul>
9. What type of group relationship will we need to build across multiple units to secure intervention goals?	<ul style="list-style-type: none"> <li>• The importance of the interdependence different partners have on each other, but with role clarity</li> </ul>
10. How to attain quality assurance without needing external enforcement?	<ul style="list-style-type: none"> <li>• Build and grow strong self-induced standards to eventual acceptance of “certified standards”</li> </ul>

by academic programmes in universities and other OD key institutions— (see their roles in next section).

6. **The journey will be relationship-rich—each ODP will have a supportive journey mate(s).** It is envisaged that the practitioner’s competence journey will be accompanied by an official advisor/

coach who is someone with deep experience in OD and has completed their OD Competence journey. These advisors/coaches will be recruited and trained by the OD professional organisations to play a formal role to support any of the practitioners who come

to the OD professional organisations to undertake the journey.

7. **There will be no external validation via certification in the first 3–5 years.** Instead of having an external certification process, individual ODPs will be encouraged, when they are ready, to undertake a self-assessment process with the support of a developmental panel who will be provided by professional associations. The purpose of that is to ensure it is the individual ODP who will drive their timing on when they want to be assessed against their own constructed competence profile.
8. **Quality assurance will come from multiple agencies partnership.** During the first 3–5 years, the quality assurance processes will be jointly owned by (a) high quality OD education and development programmes; (b) through the quality of advisors for the individual practitioners to map their OD competence profile and developmental steps; (c) through the self-assessment panel; and (d) through the individual practitioners who own their own developmental journey.

**Who will be the key players in the proposed alternative approach?**

**The role of the professional association.**

In this alternative approach, OD professional organisations will play a critical and primary role to:

- » Set up both the CORE and Comprehensive OD competencies menu in a robust consultation process.
- » Set up the process map for individuals who would like to construct their personalised competence profile.
- » Set up the process map for those organisations who will be in partnership with them in supporting this OD competence movement. For example, academic institutions, private OD consultancy firms or individual experienced ODP who wants to become “formal” advisor/coach to individual ODP.
- » Be responsible to disseminate the competencies menu—show practitioners, academic institutions, and

Table 4: *Sample List of OD Core Competencies (for Open Dialogue and Co-construction)*

Core competencies: Sub-areas	Possible Answers:
1. Well trained in Applied behavioural sciences	<ul style="list-style-type: none"> <li>• Have clear understanding of human behaviour</li> <li>• Well versed in various theoretical frameworks in diagnosis and design of intervention based on deep insights of human behaviours and needs</li> <li>• Understanding and curiosity about how to work with diverse human dynamics</li> </ul>
2. Conceptual competencies on how organisation works	<ul style="list-style-type: none"> <li>• Understand how organisation works</li> <li>• Ability to see the systemic picture</li> <li>• Ability to do diagnosis and able to handle the data to draw insights to design intervention</li> <li>• Know how to link data with intervention strategy with evaluation</li> </ul>
3. Strong group processes skills	<ul style="list-style-type: none"> <li>• Fluent in group dynamics, know how group works</li> <li>• Able to do process consultation</li> <li>• Able to do facilitation</li> <li>• Able to work with groups in diverse range of situation</li> </ul>
4. Consultancy and process skills	<ul style="list-style-type: none"> <li>• Understand the OD consultancy cycle</li> <li>• Ability to go through from contracting to diagnosis, to design intervention, to execute intervention to carry out evaluation which leads to exit</li> <li>• Able to handle various types of stakeholders through this consultancy cycle while continue to increase engagement among most people to the change issues</li> </ul>
5. Use of self	<ul style="list-style-type: none"> <li>• Clear knowledge of who they are</li> <li>• Having a grounded sense of self, not driven by need for other people's approval</li> <li>• Adequate self-esteem and self confidence</li> <li>• High awareness of the impact of self on others</li> <li>• Commitment to take building positive relationship as their top practice work</li> <li>• Have a clear sense about who they are and how they work</li> <li>• Willingness to work on our unresolved issues</li> </ul>
6. Change competency	<ul style="list-style-type: none"> <li>• Savvy in knowing how to work with planned and emergent changes</li> <li>• Understand the human dynamic and psychological matters in change</li> <li>• Savvy in the OD approach to change</li> <li>• A working knowledge of complex change and know-how to support clients to navigate through the change</li> </ul>
7. Ethics and value	<ul style="list-style-type: none"> <li>• A clear sense of their own values and ethics and how to translate them into practice</li> <li>• Subscribe to OD values</li> <li>• Having clear ethical standard</li> <li>• Strong commitment to equality, equity, diversity, and social justice</li> <li>• Know how to translate value to consultancy behaviour and conduct</li> </ul>
8. Specialism skills and knowledge	<ul style="list-style-type: none"> <li>• Develop their specialism and level of system work</li> <li>• Get to be progressively masterful in their specialism</li> <li>• Able to work across a number of specialism areas to secure synergy to work on complex cases</li> </ul>

Another way to express these core competencies are in these 8 domains:

1. Relationship with self (use of self)
2. Relationship with people (applied behaviour sciences)
3. General knowledge on how organisation works
4. Group savviness (strong group process skills)
5. General consultancy skills (general consultancy and process skills)
6. General change skills (change skills)
7. Ethics and values
8. Specialisation areas.

private developers what they are, what they mean, how to navigate the menu and the application processes—if they decide to be part of the professional constellation for propagating the OD competencies up take.

- » Play a critical role in encouraging practitioners to begin their OD competence journey and coming alongside to support them in undertaking this exercise. Make the “right to use” of the OD Competencies menu a part of the membership fee.
- » Train up advisors/coaches to guide the individual practitioners to set up the tailor-made competencies profile, identify developmental steps, as well as to support their applications. All recruited advisors/coaches once trained, will register themselves as official advisors.
- » Set up self-assessment processes as well as who can be serving as panel members (again with members of the self-assessment panel being trained and understand how to support the practitioners to undertake this journey).
- » They will also be working together with willing educational institutions and developing agencies to discuss the role of educational and development providers in designing curriculum to match the OD competence menu.

In playing the above role, they inadvertently become the holder of the OD quality of practice.

**The role of educational institutions.**

All OD educational and development providers will be introduced to the OD Core and comprehensive competency menu to review the strength of their current offerings. As a result, they may choose to strengthen their existing offerings and/or design new OD development programmes to meet the developmental requirement from the OD competence menu.

It is important that this is done from the perspective of the whole OD system and not from a competitive stance. Each institution, based on their expertise, specialisms and geographical location, will attract different ODPs who seek different types of development. Eventually, the

specialised offering to practitioners from each institution will be put on an OD educational map as the RIGHT PLACE for the practitioners to pursue that unique type of development.

By doing this, the qualification or continuous education certificate programme becomes, by intent, a key aspect of quality assurance for the area of specialism.

**Individual OD consultancy and training firms.**

Smaller OD consultancy and development firms are also being encouraged to find out what unique offerings they can provide for individual practitioners. Once they are accepted, their offerings can be mapped against specific competence as the “go to” places for individual practitioners for development.

Their staff may also become advisors with the professional associations and educational institutions after being trained.

**Experienced individual ODPs.**

They can apply to be “formal” advisor/coaches with the OD professional organisations for the individual practitioners who need support when they start their OD competence journey. Their roles include (a) knowing how both the Core and the Comprehensive menu work, so that they can help the individual practitioner navigate through the menu to come up with their personalised profile; (b) hold regular review with the individual ODP and to update the competence profile; (c) to guide the ODP on the self-assessment process; and (d) apply to sit on self-assessment panel.

**Sample list of first practical step to kick start this alternative approach**

A **sample** steps of action are listed below to show how this alternative approach can be implemented.

1. In order to get this OD competence project going, it is suggested that 2–3 OD institutions and/or OD professional associations get together, agree with each other their role in undertaking this task, seek funding to support the project and begin to do the mapping job. They should not seek permission from the

*collective community*, they should just step up and do it by being willing to invest time and resources to get the job done with best intentions for OD.

2. In this early phase, the professional associations need to focus on three tasks: 1) to establish the OD competencies menu (both core and specialities based competence) and to undertake the consultation exercise; 2) to build partnership with academic and development institutions; and 3) to recruit and train experienced ODPs to be advisors to support practitioners.
3. When the consultation of OD competency (both CORE and comprehensive menu) is done, a major trial period should start (10–18 months?). To begin with, all ODPs who are members of the professional associations will be invited to take part in the trial, and non-members can request to join also. They will be supported in distinguishing what competencies they need, what they have or not have, and identify ways to help them close the gaps. The outcome from this phase is that over 60% of participating members will have completed their individually tailor-made competence profile, a development plan.

**How long will the implementation plan take? A sample time scale.**

The following **sample time scale** shows that it will not be a short game to play. But given it took close to 70 years of hard work to get to where we are now, this time we will need to go slow to go fast. Below is an estimated timeline for the launching of OD competencies.

1.	Get collaboration across 2–3 OD institutions and professional organisation and to agree the project tasks	3–6 months
2.	Set up the OD comprehensive competence menu and put them on electronic platform ready for consultation	6–9 months

3.	Consultation feedback and revision of the menu. During this period 2 things need to happen: (1) advisors and coaches are recruited, trained, and asked to trial the competence menu themselves even when the final version is not done yet; (2) work with academic institutions and private developers about reviewing their offerings against the OD competence menu	2–4 months
4.	Ready to launch the OD competence journey in different locations; set up a feedback and trouble-shooting forum to continue to keep this journey running smoothly	1 year or 1.5 years from the beginning of the project
5.	Set up a number of review criteria and begin to market the results to other ODNs globally	Whenever

### Summary

Before closing, for those who are interested to rekindle this OD competence movement to advance the field, further reassurance on two more areas may be helpful:

**Can this practitioner-led process quality assure our standards?** The answer is yes, but it will require 3 things: (1) the successful uptake of individual OD competence profiles in different geographic areas; (2) sufficient professional associations and other OD institutions around the globe playing their part in offering quality advise and coaching as well as running the self-assessment process; (3) collaboration between OD education and development providers to offer high quality programmes for ODP. I also believe the certification process will be a natural outcome 3–5 years down the line when most ODPs get used to own their own competence profile, use the profile to guide their development work, and use it to self-assess where they are in terms of their mastery.

### How are we going to finance this journey?

I believe setting up the competence work will depend on a partnership funding approach. Each professional organisation will contribute to different aspects of this start-up process. Private funding can also be solicited. Once that is set up, all the services that the OD professional organisations offer in relationship to this OD competence project—from gaining access to the OD competence menu, to the offering of advisors/coaches, to the regular review meetings should be financially self-sustainable. For example, x% of the membership fee should be budgeted to pay for these services, or for non-members, there will be a chargeable fee. The rate in the first 3 years should be low enough to be accessible to all. As for the self-assessment process, the professional associations who house that service should charge the ODPs to cover the cost. We are recommending all practitioners should learn to put aside 7–10% of their income for their own development annually. When professional organisations are doing their job well, we expect numbers of memberships will increase and other extra services will help to steady the income stream.

### Final Remark

In this article I have looked at the OD Competence journey in the field, assessed what may be the reasons why we still do not have a coherent approach to OD competencies, revisited the reasons why we should not give up this journey, and actually explored an alternative proposal based on key OD practice principles and OD value. I hope the article has evoked in many of us the desire to rekindle a new constructive debate—followed by motivated action to ensure the movement started in 1952 will provide great traction for moving forward to make the field of OD even more credible.

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**APPENDIX 1:** An adapted version from “The Competencies of OD Practitioners” by Worley, Rothwell, and Sullivan, in *Practicing Organisation Development: A Guide for Leading Change 2010*, (3rd edition)

Competencies Label	Representative Items	Who Else?
<b>Self-mastery</b>	<ul style="list-style-type: none"> <li>» Be aware of how one’s biases influence interaction</li> <li>» Clarify personal values</li> <li>» Clarify personal boundaries</li> <li>» Manage personal biases</li> <li>» Manage personal defensiveness</li> <li>» Recognise when personal feelings have been aroused</li> <li>» Remain physically healthy while under stress</li> <li>» Resolve ethical issues with integrity</li> <li>» Avoid getting personal needs met at the expense of the clients</li> </ul>	<b>Worley and Varney</b> – N/A
		<b>Worley and Feyerherm</b> <ul style="list-style-type: none"> <li>» Clear knowledge of self</li> <li>» Personal philosophies and values; ability to operate within values</li> </ul>
		<b>Shephard and Raia</b> Intrapersonal skills (including integrity, staying in touch with one’s own purpose and values, active learning skills, rational-emotive balance, and personal stress management skills)
<b>Be comfortable with ambiguity</b>	<ul style="list-style-type: none"> <li>» Perform effectively in an atmosphere of ambiguity</li> <li>» Perform effectively in the midst of chaos</li> </ul>	<b>Worley and Varney</b> – N/A
		<b>Worley and Feyerherm</b> – N/Av
		<b>Shephard and Raia</b> – N/A
<b>Clarify roles</b>	<ul style="list-style-type: none"> <li>» Clarify the role of consultant</li> <li>» Clarify the role of client</li> </ul>	<b>Worley and Varney</b> – N/A
		<b>Worley and Feyerherm</b> – N/Av
		<b>Shephard and Raia</b> – N/A
<b>Clarify outcomes</b>	<ul style="list-style-type: none"> <li>» Clarify outcomes</li> </ul>	<b>Worley and Varney</b> – N/A
		<b>Worley and Feyerherm</b> – N/Av
		<b>Shephard and Raia</b> – N/A
<b>Good client choices</b>	<ul style="list-style-type: none"> <li>» Match skills with potential client profile</li> </ul>	<b>Worley and Varney</b> – N/A
		<b>Worley and Feyerherm</b> – N/Av
		<b>Shephard and Raia</b> – N/A
<b>See the whole picture</b>	<ul style="list-style-type: none"> <li>» Quickly grasp the nature of the system</li> <li>» Identify the boundary of systems to be changed</li> <li>» Identify critical success factors for the intervention</li> <li>» Further clarify real issues</li> <li>» Link change effort into ongoing organisational processes</li> <li>» Begin to lay out an evaluation model</li> <li>» Know how data from different parts of the system impact each other</li> <li>» Be aware of systems wanting to change</li> </ul>	<b>Worley and Varney</b> <ul style="list-style-type: none"> <li>» System dynamics</li> </ul>
		<b>Worley and Feyerherm</b> <ul style="list-style-type: none"> <li>» Ability to see systems (system thinking)</li> </ul>
		<b>Shephard and Raia</b> <ul style="list-style-type: none"> <li>» Collateral knowledge areas (including behavioural sciences, systems analysis, R &amp; D)</li> </ul>
<b>Clarify data needs</b>	<ul style="list-style-type: none"> <li>» Determine an appropriate data collection process</li> <li>» Determine the types of data needed</li> <li>» Determine the amount of data needed</li> </ul>	<b>Worley and Varney</b> – N/A
		<b>Worley and Feyerherm</b> – N/Av
		<b>Shephard and Raia</b> – N/A

Competencies Label	Representative Items	Who Else?
<b>Understand research methods</b>	<ul style="list-style-type: none"> <li>» Utilize appropriate mix of methods to ensure (1) efficiency (2) objectivity, and (3) validity</li> <li>» Utilize appropriate mix of data collection technology</li> <li>» Use statistical methods when appropriate</li> </ul>	<b>Worley and Varney</b> – N/A
		<b>Worley and Feyerherm</b> – N/Av
		<b>Shephard and Raia</b> – N/A
<b>Keep an open mind</b>	<ul style="list-style-type: none"> <li>» Suspend judgement while gathering data</li> <li>» Suppress hurtful comments during data collection</li> </ul>	<b>Worley and Varney</b> – N/A
		<b>Worley and Feyerherm</b> – N/Av
		<b>Shephard and Raia</b> – N/A
<b>Set the conditions for positive change</b>	<ul style="list-style-type: none"> <li>» Collaboratively design the change process</li> <li>» Clarify boundaries for confidentiality</li> <li>» Select a process that will facilitate openness</li> <li>» Create a non-threatening atmosphere</li> <li>» Develop mutually trusting relationships with others</li> <li>» Solicit feedback from others about your impact on them</li> <li>» Use information to reinforce positive change</li> </ul>	<b>Worley and Varney</b> – N/A
		<b>Worley and Feyerherm</b> – N/Av
		<b>Shephard and Raia</b> – N/A
<b>Use data to adjust for change</b>	<ul style="list-style-type: none"> <li>» Use information to correct negative change</li> <li>» Use information to take next steps</li> <li>» Establish method to monitor change after the intervention</li> <li>» Use information to reinforce positive change</li> <li>» Gather data to identify initial first steps of transition</li> </ul>	<b>Worley and Varney</b> – N/A
		<b>Worley and Feyerherm</b> – N/Av
		<b>Shephard and Raia</b> – N/A
<b>Focus on relevance and flexibility</b>	<ul style="list-style-type: none"> <li>» Distill recommendations from the data</li> <li>» Pay attention to the timing of activities</li> <li>» Recognize what is relevant</li> <li>» Stay focused on the purpose of the consultancy</li> <li>» Continuously assess the issues as they surface</li> </ul>	<b>Worley and Varney</b> – N/A
		<b>Worley and Feyerherm</b> » Focusing on relevant issues
		<b>Shephard and Raia</b> – N/A
<b>Participatively create a good implementation plan</b>	<ul style="list-style-type: none"> <li>» Co-create an implementation plan that is (1) concrete; (2) simple; (3) clear; (4) measurable; (5) rewarded; and (6) logically sequences activities</li> </ul>	<b>Worley and Varney</b> » Designing and choosing appropriate and relevant interventions
		<b>Worley and Feyerherm</b> – N/Av
		<b>Shephard and Raia</b> – N/A
<b>Manage transition and institutionalization</b>	<ul style="list-style-type: none"> <li>» Help manage impact to related systems</li> <li>» Use information to correct negative change</li> <li>» Transfer change skills to internal consultant so learning is continuous</li> <li>» Maintain/increase change momentum</li> <li>» Mobilize additional internal resources to support continued change</li> <li>» Determine the parts of the organisation that warrant a special focus of attention</li> <li>» Ensure that learning will continue</li> </ul>	<b>Worley and Varney</b> » Managing the consulting process » Analysis and diagnosis » Facilitation and process consultation » Developing client capability
		<b>Worley and Feyerherm</b> » Ability to design » Ability to deeply understand an organisation
		<b>Shephard and Raia</b> » General consultation skills (including entry and contracting, diagnosis, designing and executing an intervention, and designing and managing large change processes) » Research Design/Data Collection/data analysis

Competencies Label	Representative Items	Who Else?
<b>Ability to evaluate change</b>	<ul style="list-style-type: none"> <li>» Choose appropriate evaluation methods</li> <li>» Determine level of evaluation</li> <li>» Ensure evaluation method is valid</li> <li>» Ensure evaluation methods is reliable</li> <li>» Ensure evaluation method is practical</li> </ul>	<b>Worley and Varney</b> <ul style="list-style-type: none"> <li>» Research methods/statistics</li> <li>» Evaluating organisation change</li> </ul>
		<b>Worley and Feyerherm</b> <ul style="list-style-type: none"> <li>» Evaluate and research</li> </ul>
		<b>Shephard and Raia</b> <ul style="list-style-type: none"> <li>» Research &amp; evaluation of knowledge and skills</li> </ul>
<b>Manage client ownership of change</b>	<ul style="list-style-type: none"> <li>» Reduce dependency on consultant</li> <li>» Instill responsibility for follow through</li> <li>» Involve participants so they begin to own the process</li> </ul>	<b>Worley and Varney</b> – N/A
		<b>Worley and Feyerherm</b> – N/Av
		<b>Shephard and Raia</b> – N/A
<b>Be available to multiple stakeholders (develop relationships)</b>	<ul style="list-style-type: none"> <li>» Collaborate with internal/external OD professionals</li> <li>» Balance the needs of multiple relationships</li> <li>» Listen to others</li> <li>» Interpersonally relate to others</li> <li>» Use humour effectively</li> <li>» Pay attention to the spontaneous and informal</li> </ul>	<b>Worley and Varney</b> – N/A
		<b>Worley and Feyerherm</b> <ul style="list-style-type: none"> <li>» Interpersonal skills</li> <li>» Ability to bring people together</li> <li>» Consider multiple viewpoints</li> </ul>
		<b>Shephard and Raia</b> <ul style="list-style-type: none"> <li>» Interpersonal skills (including listening, establishing trust and rapport, giving and receiving feedback, and counselling and coaching)</li> </ul>
<b>Build realistic relationships</b>	<ul style="list-style-type: none"> <li>» Build realistic expectations</li> <li>» Explicate ethical boundaries</li> <li>» Build trusting relationships</li> </ul>	<b>Worley and Varney</b> – N/A
		<b>Worley and Feyerherm</b> – N/Av
		<b>Shephard and Raia</b> – N/A
<b>Address power</b>	<ul style="list-style-type: none"> <li>» Identify formal power</li> <li>» Identify informal power</li> <li>» Deal effectively with resistance</li> </ul>	<b>Worley and Varney</b> – N/A
		<b>Worley and Feyerherm</b> <ul style="list-style-type: none"> <li>» Pay attention to power and influence</li> <li>» Consulting is saying the tough stuff</li> </ul>
		<b>Shephard and Raia</b> – N/A
<b>Manage diversity</b>	<ul style="list-style-type: none"> <li>» Facilitate a participative decision-making process</li> <li>» Be aware of the influences of cultural dynamics on interactions with others</li> <li>» Interpret cross-cultural dynamics on interactions with others</li> <li>» Interpret cross-cultural influences in a helpful manner</li> <li>» Handle diversity and diverse situations skilfully</li> </ul>	<b>Worley and Varney</b> <ul style="list-style-type: none"> <li>» Comparative cultural perspective</li> </ul>
		<b>Worley and Feyerherm</b> <ul style="list-style-type: none"> <li>» Cultural experiences</li> </ul>
		<b>Shephard and Raia</b> – N/A
<b>Manage the separation</b>	<ul style="list-style-type: none"> <li>» Be sure customers and stakeholders are satisfied with the intervention's results</li> <li>» Leave the client satisfied</li> <li>» Plan for post-consultation contact</li> <li>» Recognize when separation is desirable</li> </ul>	<b>Worley and Varney</b> – N/A
		<b>Worley and Feyerherm</b> – N/Av
		<b>Shephard and Raia</b> – N/A

Competencies Label	Representative Items	Who Else?
<b>Integrate theory and practice, stay current in technology</b>	<ul style="list-style-type: none"> <li>» Present the theoretical foundations of change</li> <li>» Articulate an initial change process to use</li> <li>» Integrate research with theory and practice</li> <li>» Communicate implications of systems theory</li> <li>» Utilize a solid conceptual framework based on research</li> <li>» Use the latest technology effectively</li> <li>» Use the internet effectively</li> </ul>	<b>Worley and Varney</b> <ul style="list-style-type: none"> <li>» Organisation behaviour (including culture, ethics, psychology, and leadership)</li> <li>» Group dynamics</li> <li>» Management, organisation theory and design</li> <li>» OD &amp; C</li> <li>» Theories and models for change</li> </ul>
		<b>Worley and Feyerherm</b> <ul style="list-style-type: none"> <li>» Strong in theory and practice</li> </ul>
		<b>Shephard and Raia</b> <ul style="list-style-type: none"> <li>» Organisation behaviour/OD knowledge and intervention skills (including group dynamics and team building, OD theory, organisation theory and design, open systems, reward system, large system change theory, leadership power and sociotechnical analysis)</li> <li>» Major management knowledge areas (experience as a line manager/major)</li> </ul>
<b>Ability to work with large system</b>	<ul style="list-style-type: none"> <li>» Facilitate large group (70–2000) interventions</li> <li>» Apply the skills of international OD effectively</li> <li>» Function effectively as an internal consultant</li> <li>» Demonstrate ability to conduct transorganisational development</li> <li>» Demonstrate ability to conduct community development</li> <li>» Consider creative alternatives</li> </ul>	<b>Worley and Varney – N/A</b>
		<b>Worley and Feyerherm</b> <ul style="list-style-type: none"> <li>» Large systems fluency</li> <li>» Core knowledge about the field</li> </ul>
		<b>Shephard and Raia – N/A</b>
		<b>Worley and Varney – N/A</b>
		<b>Worley and Feyerherm</b> <ul style="list-style-type: none"> <li>» Functional knowledge of business</li> <li>» Broad education, training, experience</li> <li>» Business orientation</li> </ul>
		<b>Shephard and Raia – N/A</b>

“The work of producing OD core competencies will help coalesce different elements of OD into an enduring and sustainable systemic paradigm on change that the world needs today.”

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## Responses to Dr. Cheung-Judge’s Article

Respondents:

Lennox Joseph

Jackie Stavros

Robert J. Marshak

Marc Sokol

Joanne Preston

Lisa Meyer

Elizabeth Nicastro &

Claudia Rios-Phelps

**As Dr. Cheung-Judge has addressed a critical element in the OD field that has challenged us for decades, we have asked a wide range of members of our community for commentaries to her article.**

### LENNOX JOSEPH

Dr. Mee-Yan Cheung-Judge’s professionally researched and detailed review of OD’s journey to establishing the field’s core competencies is an invaluable and much needed contribution to the science and practice of OD in 2020. While we deal with major global social unrest, increasing political instability and a health pandemic redefining how we live and work together, it is critical that Organization Development Practitioners (ODPs) realize, now more than ever, the challenges we face as a field and our critical role for supporting and influencing a democratic ethos in organizational and communal life. Of added significance is that the OD field as an area of study and research is under siege as evidenced by the forthcoming closings of university master degree programs at the University of St Thomas (Minnesota), at Sonoma State University (California) and The American University (Washington, DC). This does not include the closing of OD certificate programs in well-established and long-standing institutions that is presently being discussed. Clearly the demand for what OD offers is diminishing.

A hallmark of Mee-Yan’s article is its tremendous research, citing 31 major analyses on OD competencies from the field’s

earliest days of the 1950s to the very present. It not only shows the long journey that OD core competencies have taken to get to their current state, but also the value and integrity OD training institutions and practitioners attach to our core competencies as a means of further validating our practice and supporting its credibility for the future.

Noteworthy in the article is the recommended transition to an OD competency-based practice. Mee-Yan’s suggestion that this change could occur through individual requests as opposed to some form of enforcement, warrants confidence and further support for its adoption. This proposed transition plan helps us more easily swallow this bitter pill which we all can acknowledge is of immense benefit to our professional practice even though we often prefer self-identifying our proficiency rather than adhering to an agreed set of competencies. We should keep in mind that OD competencies have been in existence before, however the rigorous and methodological work done by Certified Consultants International (CCI) in the 1980s seems to have almost totally disappeared.

Several reasons come to mind as to why the time is ripe for the OD field to

adopt core competencies. First and foremost is the clear fact that our major stakeholders, the client systems for whom we work, keep requesting a yardstick to ascertain good OD performance. Given that the work of change usually takes some time, ODPs often offer clients a promissory note on the changes they can expect. Working on, clarifying, and distinguishing our core competencies fulfills our client requests for the level of service they can expect and a more systematic mechanism to decide who they engage. It is much better for us as OD practitioners to be proactive in deciding such a standard now rather than waiting for an external force to influence, and even possibly demand, how we regulate and qualify ourselves.

Another reason to support OD core competencies is that struggling together to define them will provide significant discussion that is a critical step to create the cohesion we need. Over recent years the field has become more fragmented and differentiated as evidenced by the low turnout at international conferences. We now only have a few often-misunderstood values that hold us together. The dialogue on the road to consensus on our core competencies will help us understand the myriad perspectives existing in OD and clarify the common ground we hold. The work of producing OD core competencies will help coalesce different elements of OD into an enduring and sustainable systemic paradigm on change that the world needs today.

A third factor is that for too long OD practitioners have relied on a simple description that OD is both ‘art and science’—equally disciplined and research oriented while allowing incredible

autonomy and creative inspiration. In this depiction the bifurcation of these interests has confused clients, and undermined how the field is viewed, sabotaging the contributions we can provide human systems today.

One of the issues facing the adoption of OD core competencies is the duality of it being both a practice area without regulation and theory/academic based. This long-standing divergence has led to our identification as “practical theorists” or “theoretical practitioners.” Practical theorizing essentially means that we practice OD work with a theoretical perspective while generating theory and models to achieve results and advance client learning. Nonetheless, this bridge between theory and practice does not resolve the deep underlying issues about which theories advance the field, and which are change methodologies created out of practitioners’ skills and intuitions. Deciding on core competencies means the OD field will have to review the way it looks at the interplay of practice and theory and find a more meaningful way to assess foundational theory that supports the creation of value for clients and knowledge for practitioners.

The seeming imbalance among various OD degree and certification programs can be addressed in the search for core competencies. Globally, candidates desirous of entering OD often travel long distances to gain what they consider a higher status and more thorough OD education than those provided locally. Regularizing and accepting OD core competencies supports the inclusion of local OD training efforts in countries now developing their OD capabilities. Moving to an agreed upon set of core competencies therefore allows

greater global equity for the entry, knowledge acquisition, and skill development of future ODPs.

More than ever before core competencies are needed in the OD field. OD’s impact has been undermined by our inability to organize ourselves and determine a list of competencies that define us and provide social cohesion for our efforts. As in the guilds of old, standards and competencies define mastery in a field and allow practitioner skills to be transparently offered in a marketplace adding to the integrity of a profession. The fact that the OD field’s almost 80-year history has not yet defined practice standards contributes to one image of us as fluffy, more process- and emotionally-focused than results oriented, often disparaging what we can offer to organizations, communities and to advance social change.

As someone who has worked in and led an OD practice in a large transnational organization I can attest to the need for core competencies that not only define the field but brand it as a credible and trustworthy contributor to organizational and community life today. The need for OD core competencies is now more pressing than ever. Mee-Yan Cheung-Judge posits a powerful challenge for the OD field to agree on a set of core competencies and the means to do so. What is left is for OD organizations, training associations, universities, and practitioners to respond in an overwhelmingly affirmative manner.

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**The fact that the OD field’s almost 80-year history has not yet defined practice standards contributes to one image of us as fluffy, more process- and emotionally-focused than results oriented, often disparaging what we can offer to organizations, communities and to advance social change.**

I appreciate the thorough and thoughtful contribution by Mee-Yan Cheung-Judge, and most importantly, her bringing to the forefront the debated topic in OD on competency agreement and certification of competencies. For many years now, it is the debate that goes on and on for us. After reading her assessment, position, and ideas, I asked myself why does it matter, and does one matter more?

Hopefully—we agree there is no simple or single answer. Yet, Mee-Yan Cheung-Judge does a clear and focused job reminding us what it is about, why it is important, and possibilities to move forward—thank you!

To help us think more clearly about this, she starts with understanding the motivation behind the pursuit and what *competency* and *certification* means to the OD world. What I learned from Mee-Yan Cheung-Judge's article is that competency and certification are different, important, and complex. She does a detailed job in *Table 1* of presenting all the efforts of the field for almost the last 70 years. Let's take a look at what competency and certification means to our profession.

Just what is a competency? It is a combine of knowledge, skills, and abilities

based on both formal or professional education and practice to successfully complete a task. Why we must have a list of competencies is to know that OD practitioners are qualified to do their work with no harm to the system and make a positive contribution. Now, once competencies are agreed upon, the bigger question is how to assess attainment. Is it going to be based on training, on-the-job learning, assessment, and/or formal qualifications? And who will assess? She offers a thoughtful way forward on balancing the polarities, a set of helpful intervention questions, and proposes how we might move forward. Imagine that doing an intervention on our profession—check out *Table 3* (page 16).

Then, she weighs in on what and how credentialing can be done and by whom. When you get into credentialing, the topic of certification comes up. Certification is all about credentials. When a group of certifying bodies get involved in credentialing, that represents a standard of quality and commitment on part of the profession. It shows that we have an agreed upon set of standards—competencies that we are committing ourselves and others to follow through to achieve and sustain it. And Mee-Yan Cheung-Judge provides the

key stakeholders and suggests what their strengths are and how they can help to validate the knowledge, skills, and abilities in OD. The only concern that I have is the timeline may take more than allocated. Isn't that always a challenge to find resources: time, people, and funding?

And there is one more thing to consider, once someone is certified, what is required to maintain certification? When it comes time to answer this question, we will have figured out the competencies and if, how, and who will be certifying. For now, I appreciate Mee-Yan Cheung-Judge's work and support a dialogue on co-creating a CORE set of competencies and the comprehensive menu as the right pathway forward for the OD profession, field, and discipline, and even that is up for debate: is OD a profession, field, and/or discipline? (For more information on that debate: <https://managementhelp.org/organizationdevelopment/index.htm>).

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... once competencies are agreed upon, the bigger question is how to assess attainment. Is it going to be based on training, on-the-job learning, assessment, and/or formal qualifications? And who will assess? She offers a thoughtful way forward on balancing the polarities, a set of helpful intervention questions, and proposes how we might move forward.

Applause to Dr. Cheung-Judge for her thoughtful review of the many OD competency efforts conducted over the years and some of the issues and dilemmas associated with them. Given the continuing interest in, efforts to address, and debates about OD competencies, her suggestion of a different way to address them is worth serious consideration.

I'll leave to others to debate specifics, raise concerns, suggest additional ways to move things forward, and also add their thanks to Mee-Yan for her efforts on behalf of a community she cares deeply about. Instead I'd like to add one additional consideration to her approach, or any other efforts related to OD competencies.

Right now, the issues are framed sometimes as what are the competencies for the **OD Field** and perhaps more often as what are the competencies of a **(Professional) OD Practitioner**. Now, of course, fields and professions are overlapping concepts, but by no means identical. Fields like medicine, law, accountancy, etc. have certain minimum values, ethics, and competencies. They are also composed of different types of members. The field of medicine has medical doctors, but also nurses, specialty technicians, non-traditional healers, and so on. Knowledge fields are similar. The knowledge

field of psychology has certain core theories, values, ethics, etc., but anyone can claim to be part of that field if they take some courses and read some books. Psychological professions, whether therapist, counselor, and so on, are assumed to have a different level of knowledge, skills, and practice than someone who is simply knowledgeable about, or has some kind of degree in, the field. Like lawyers and medical doctors, they are also certified and regulated by governing bodies and laws to insure (assumed) minimum levels of professional competency to protect potential clients.

In some ways I think many of the past competency efforts have conflated what at the time were considered important competencies for the **Professional Practice of OD** with what competencies (especially knowledge and values) are essential to be a member of, or aligned with, the **Field of OD**. Given that the issue of certification keeps looming in the background, it makes sense to me to talk explicitly about the competencies needed for the professional practice of OD, as distinguished from, or in addition to, the competencies needed to be considered a member of the OD field. Of course, talking explicitly about "the professional practice of OD" raises all sorts of difficult issues unsuccessfully

dealt with in the past: are OD practitioners even remotely professionals like doctors, lawyers, accountants, therapists, etc.; whose criteria and judgments would establish the competencies; what sanctioning body would have the authority to monitor or determine who was in and who was out; could practitioners self-certify; and how not to create barriers for the continuing development of what is considered OD; to name a few. These issues recede into the background somewhat if trying to establish competencies for responsible membership in the OD field, since in that case the responsibility is mainly to fellow OD members and less directly or not at all to potential clients.

I should add that by raising these distinctions I am not advocating for an effort addressing the competencies needed for the professional practice of OD nor the competencies for membership in the OD field. Instead, I am advocating that future OD competency efforts explicitly think about if they are developing competency criteria for OD as a field or for the professional practice of OD and if for both how is each addressed.

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Given that the issue of certification keeps looming in the background, it makes sense to me to talk explicitly about the competencies needed for the professional practice of OD, as distinguished from or in addition to, the competencies needed to be considered a member of the OD field.

## The Road to Revitalization

Mee-Yan Cheung-Judge (2020) provides a valuable review of organization development (OD) competencies across the history of this field, leading to a perspective on revitalizing the profession. In the following commentary, I hope to extend her discussion on competencies and distinguishing features of competence in OD professional practice.

Competencies are descriptors for clusters of knowledge, skills and abilities (KSAs). Within organizations and across variety of jobs, these are part of the process for increasing the validity of selection, training, and distinguishing levels of expectations, both in role and at different levels of leadership. We often use competency modeling as a key step in job analysis and selection practices to predict performance and mitigate adverse impact. When professional associations employ competencies, they are often doing so for a variety of reasons: to clarify essential components of practice; to provide a path toward certification if such credentialing exists; to self-manage professional practice and limit external regulation; to establish who can provide services to the public; setting industry standards that create an entry barrier into practice for those who lack the designated competencies or certification.

Useful as they are, competencies don't tell us how well one performs, just the array of distinct categories of KSAs. When there are many competencies it is often useful to also have clusters or dimensions grouping related competencies. With that principle in mind, I was able to reframe Cheung-Judge's Table 2 into two clusters, internally and externally facing competencies. Internal competencies are reflective and analytic, occur within the mind of the practitioner, but they may not be visible to the consumer. External competencies are visible to those with whom the OD practitioner is working. The internally focused competencies might further be divided into two categories, those that involve analytic assessment of the opportunity and those that involve the practitioner's ongoing

reflective state and use of self. External competencies can also be divided into two categories, initial structuring of the intervention and managing the process over time. This clustering of Cheung-Judge's competencies is presented in Table 1.

A change management approach, like Prosci, might employ somewhat different competencies to provide an analytic perspective, but with key focus on structuring the intervention and managing the process over time, relying on the ADKAR model (Hiatt, 2006). I expect that they would propose far less, if anything, about management of self as a cluster of competencies; rather it is the simplicity of their change process that they seek to highlight. In contrast, I believe it is this latter cluster of competencies, management of self that leads to ongoing differentiation of OD professionals.

Similarly the large national consulting firm that has developed a specialty practice in change management might have a highly structured analytic perspective with elaborate data gathering, analysis and report out used across all companies with whom they consult. Their key differentiator is often the benchmarking they provide, illustrating how one company compares to others. This is followed by an equally structured plan for change. The intent is to provide a scalable framework over many companies with the capability to bring in a team of less experienced consultants who follow a highly specific model regardless of the firm. Like the previous example, this business model also would not embrace individualized management of self as a differentiator of service delivery.

From my perspective the best practitioners aren't those who have the 5- or 7-step model that looks visually appealing and

Table 1: Clusters of OD Practitioner Competencies

Inward Reflective Competencies	Outward Demonstrating Competencies
<i>Use and Management of Self</i>	<i>Structuring the Engagement</i>
1. Self-mastery	1. Clarify roles
2. Comfort with ambiguity	2. Clarify outcomes
3. Good client choices	3. Clarify data needs
4. Focus on relevance and flexibility	4. Set the conditions for positive change
5. Keep an open mind	5. Participatory create a good implementation plan
	6. Build realistic relationships
	7. Be available to multiple stakeholders
<i>Maintain Analytic Perspective</i>	<i>Managing the Process Over Time (Intervene at the right time)</i>
1. See the whole picture	1. Manage client ownership of change
2. Understand research methods	2. Ability to work with large system
3. Ability to evaluate change	3. Address power
4. Integrate theory and practice, stay current on technology	4. Manage diversity
	5. Use data to adjust for change
	6. Manage transition and institutionalization
	7. Manage the separation

applies to all situations, but instead it is the practitioner who can embrace the panoply of frameworks alluded to in *Table 1* of Cheung-Judge's article. They do so in the way that they cycle through the competency clusters, perhaps beginning with internal analytic assessment, using that to help structure the engagement, then continually make use of self to assess the need for adjustment, and bring their full set of capabilities to the client and tasks at hand as they manage the process over time.

Use of Self, described in the research of Cheung-Judge and Jamieson (2020) and Jamieson and Davidson (2019), captures the detailed study of how OD professionals make use of self as an integral component of change and OD consultation. It is in this sense that we embody what Donald Schön (1983) described as the reflective practitioner, a professional who recognizes the importance of context on shaping the issues that must be addressed. Reflective practitioners understand that how you frame the problem can impact the type of approach and solution you will reach. It is for that very reason, whether they enter the system as an executive coach, via team development, or culture assessment, they embrace multiple models and continue to explore with a variety of diagnostic lenses. The reflective practitioner is a professional who deeply appreciates use of self as they carry out their work.

If we pause and look at the wider consulting industry, we can recognize the polarity of a profession and its standards juxtaposed with an entrepreneurial spirit

and competition that exists for securing work in a competitive marketplace. Among the hallmarks of the reflective practitioner that bridge this polarity is the OD consultant's ability to step back and consider the context of the problem at hand; to embrace multiple models; to see opportunities from different perspectives. For consumers, who can't see what is going on inside the OD consultant's mind, we need to capture and share the story of how reflective practice matters. We need to articulate the impact of our intervention, shining a light on how use of self makes a difference in the process and quality of OD consultation.

Where change agents, under the guise of OD or any other label, have taken up their business development efforts as a hammer in search of a nail, they may have been able to market and sell services, but they haven't advanced the profession. The road to OD revitalization is to recognize the importance of context and situational analysis and make it tangible for consumers. We need to help consumers of OD services appreciate the importance of these particular competencies as they choose a partner. If a prospective client wants to simply check the box, benchmark against what looks pretty on a PowerPoint deck, or outsource their thinking and engagement in transformation of the business, then any attractive model will be sufficient. If on the other hand, they see transformation as a key responsibility of the leadership team, and realize an OD partner must be engaged in a dynamic change process with them, they should be looking for

consultants and OD staff who have learned to effectively use his or herself as instruments of change.

The road to professional revitalization doesn't just pause at a competency way station called 'management of self.' Rather the competencies that allow for management of self become our compass and trusted resource as we embrace all other OD competencies, and as we ensure we provide the best possible OD support for our clients.

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**The road to OD revitalization is to recognize the importance of context and situational analysis and make it tangible for consumers. We need to help consumers of OD services appreciate the importance of these particular competencies as they choose a partner.**

The article by Mee-Yan Cheung-Judge, entitled OD Core Principles, OD Competency, and Use of Self?, is one of the most comprehensive manuscripts summarizing the past and future endeavors that the organization development and change field has made in competency identification. I applaud the work that has gone into this article and the thought about the direction that our profession can take to formalize this procedure.

I came from a psychology background and my training has been about the strength of the American Psychological Association and the strides it made to professionalize the psychology field. It has gone the route of identifying and legalizing what it means to be a psychologist to the extent that this association can dismiss and punish individuals who do not behave according to the standards of the professional and state requirements of this field.

Yes, the requirements of states are rigorous to the point of punishment if you move from one state to another. I found OD to be a more open field with accepting people who put aside judgement. My home is in organization development and I left my roots only a few years after I received my PhD. My honest fear is that OD will follow in the footsteps of an already created model.

I am all for making our field professional, and I too want to have a unifying statement of competency to protect the public as well as the reputation of our field. I just do not want to go as far as the American Psychological Association has gone with legalizing and standardizing education, training, practice, and state evaluation of practitioners in the organization development field. We come from a humanistic tradition and I want to maintain our ethics and way of interaction that has flexibility

and cooperation with educational institutions, corporations, academics, practitioners and new people into the field.

When any group and individuals take on this challenge, I urge them to remember our roots. Synergy is the basis for growth and thinking outside of an already made box, creatively. This is the best way to approach this exciting professional challenge. Please remember there are always many solutions to any issue and coming up with a Superordinate goal that excites all involved is not easy but does produce real cooperation.

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**We come from a humanistic tradition and I want to maintain our ethics and way of interaction that has flexibility and cooperation with educational institutions, corporations, academics, practitioners and new people into the field.**

## The “Thing” About OD

I believe in Organization Development. I believe the world needs more professionals who are prepared and willing to work from multiple perspectives, across multiple disciplines and in the messiness of real-world problems. I am concerned about attracting new people to the field as well as training and nurturing the next generation of broad-minded, discipline-spanning, pragmatic systems thinkers.

Yet, in reflecting upon this challenge, I have become increasingly aware of some intractable problems in the well-entrenched and time-honored narratives of OD that are detrimental to the flourishing of innovation in organization development scholarship and practice. And I wonder if a focus on OD competencies prevents new, more inspiring narratives, from emerging.

The philosopher Richard Rorty (1989) wrote that the trouble with arguments against the use of a familiar and time-honored vocabulary is that they are expected to be phrased in that very vocabulary. And this has been the ongoing challenge in seeking new narratives for organization development.

**Narratives That Hold Us Back.** In his 2018 article entitled *The Rise and Fall of the Growth of Organization Development*, Warner Burke wrote, “The fundamentals of OD have been invented and have served us well, but little if any innovation has occurred in the field since 1987 when appreciative inquiry was introduced” (p. 188). Burke said the field of OD is stagnant and not growing with respect to inventiveness and innovation, a conclusion he drew from his historical analysis of OD. Burke’s narrative that labels OD as a “stagnant thing” not only holds us back, it also ignores new theories of leadership, dynamic capabilities, diversity, equity and inclusion, design thinking, growth mindsets, neuroscience-based learning systems, sensemaking, Use of Self, Agility, and much more that can now be added to the arsenal of knowledge and tools for organization development.

### Narratives That Can Be Inspiring.

Freeman and Gilbert (1992) wrote that it is only by profoundly challenging the descriptions and narratives of our world that we can improve it, and this is what I attempt to do here. The original inspiration behind organization development was as an intellectual movement responding to oppressive modes of management. It has over time offered numerous ways to resolve conflict, to create greater flexibility and resiliency in individuals and to help organizations cope with turbulent environments. These things are as crucial today as they ever have been. And, with its Lewinian foundation and wide range of participative tools and techniques for promoting behavior change, OD is today considered the major approach to organizational change. But, like any important social, political, or intellectual movement, fresh ideas are needed to sustain energy and relevance over time and across successive generations. This is not an argument against OD, because OD is organization development. But it is not all that organization development can be.

**A Different Class of Thought.** Organization development is centered on continuous adaptation in ever-evolving environments and balancing the needs of diverse stakeholders. It should not be put in a box and labeled a “stagnant thing.” It is best considered as an altogether different class of disciplinary thought, along with innovation, entrepreneurship and design, where it is defined in the doing—an interplay of theory and practice that forms a way of thinking about experiences and problem-solving. This class of disciplinary thought is distinguished by the integration of theoretical knowledge from many disciplines along with practice knowledge. It is also looking to innovative design thinkers like Steve Jobs and emerging practice-driven concepts like stakeholder theory for new knowledge that has yet to make its way into OD textbooks. Its scholarly home is the scholarship of integration—multidisciplinary, integrative, and problem-focused.

**Many Guises and Manifestations.** Organization development can take on

numerous guises within organizations. It shows up in expected ways, in OD professionals who are trained in interventions that diagnose, design and facilitate change solutions for organization problems. It also shows up in unexpected ways with people at multiple levels inside organizations viewing problems from a systems perspective, identifying interdependencies and closing gaps in understanding through learning. It also shows up as an executive function concerned with the alignment of purpose, business models, organization design, culture, strategy, processes, policies, incentives, and technology. These are all manifestations of organization development being integrated into many types of work, and it portends a different future for the field, one that will attract bright, enthusiastic new talent to organization development.

One of the most exciting and empowering features of organization development is being where we are today, situated in a problem at the nexus of the past and a co-created future. While a narrative around OD competencies may help to make OD a better “thing,” it is not an inspiring narrative for organization development.

I ask you to imagine the difference if the energy around OD competencies could be redirected into creating and sharing a more inspiring, vibrant future for organization development, for the success and well-being of all people and organizations.

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## OD 2.0: Enabling A Virtual Reality

### Introduction

We are two emerging OD practitioners (ODP) on the brink of graduating from our Master of Science in Organization Development (MSOD) program at American University (AU). We started our respective learning journeys in January 2019 together with ten other students in an in-person residency. In March 2020, the program delivery changed drastically, as did the rest of the world's functioning, due to COVID-19. In a few short weeks, we will be ending our program waving to each other through boxes on screens. And in a few short months after that, the next—and last—AU MSOD cohort will graduate, and the program itself will shutter its doors, an early casualty of the pandemic after years of issues with recruitment and retention. Our education has been shadowed by hearing that OD is “bad” at marketing, and we could not argue with this perception—we both found the gift of this program as if by accident, thanks to word of mouth. Having grown so much through this program, we grieve the ending to come as we near graduation and the loss of the mighty AU MSOD program.

This context sets the tone for our response to Mee-Yan Cheung-Judge's OD competency article. Not only as members of the next generation of OD practitioners but as the generation of virtual OD practitioners. OD and its competencies need to be brought into the future to reflect connecting, working, and facilitating virtually. COVID-19 has shifted the landscape dramatically, and the OD competencies themselves and how they are leveraged should reflect this. We might not be in a pandemic forever (we hope), but we will experience the ripple effects for a long time to come. While we have leaned on the competencies we have learned through our OD training to stay present even during the most VUCA of times, they must now be approached differently. We are so far past a “now, more

than ever” moment. It is time for a 2020—and beyond—of OD. In our response, we agree with Dr. Cheung-Judge's more action-oriented approach on moving forward, and we share some perspectives on the competencies and how we would like to see them used.

### The What: Reactions to Competencies

Mee-Yan Cheung-Judge notes that it will not be productive to focus on the WHAT and the focus needs to be on the HOW (emphasis from the author). Having already been exposed to multiple competency lists during our education, and learning more about the history from her article, we believe there is something to be said about moving forward and taking action. At the same time, the competencies are worth revisiting, especially with a lens for the skills/competencies that will propel us into the 21st century. Therefore, we are compelled to address some of the “what” before moving on to the “how.”

The future of OD is virtual, and the competencies need to reflect that. As we shifted to complete our degrees and perform our day jobs online, we had a lot to figure out—and quickly. We found ourselves experimenting with and sharing across our cohort how to virtually design the high-touch in-person experiences we had learned about in school, how to create connections virtually, and what self-care looked like to combat “Zoom fatigue,” not to mention what this world-wide change might mean for the future of our work. Hardly any of our reading covered how to do this virtually—any articles we were pointed to were considered “optional.” Virtual work is not optional anymore.

Connecting, working, and facilitating virtually are a top priority. We noticed that in the article, the competency “Integrate theory and practice, stay current in technology” includes a bullet: “use the internet effectively.” Nowadays, there is much more to consider in technology than just being able to use the internet effectively. Employees and companies have embraced the virtual workspace, and companies focus on

building high-performing remote teams' capabilities. People can work anywhere. Companies see “an uptick in productivity when employees are working more communicatively and collaboratively. This productivity hike offers a \$900 billion to \$1.3 trillion value to the economy. [Additionally] a remote workforce delivers several advantages to small and growing companies; talent can be sourced from anywhere in the world, and at price points that work for both the company and the employee” (“*Collaborating on the Future of Work*,” 2020). This push toward remote work opened up more doors for ODPs to work globally. We, ODPs who are coming out of school with a fair amount of experience in this area know the vital role technology played in our school work. We can no longer be scholar-practitioners without being well-versed in at least a few virtual *collaborations tools*. Virtual collaboration is the name of the *new game*.

The nature of how we engage with clients and our systems to do the work is changing. For example, virtual data collection needs to account for the OD practitioner working harder to process non-verbal cues like facial expressions and body language via video chat, and missing key data points from not visiting client buildings and offices in person (“*Here's why you're feeling Zoom fatigue*,” 2020). This skill is brought even more into center stage as we design interventions and need to account for technology while responding, as best we can, to the human elements.

The humanistic values of OD keep people, connection, and care at the forefront of our work. Now, the leaders we will support, and the people affected by the decisions we will help them make are on a different level than ever before. Checking in on mental, emotional, and physical planes are a foundational part of any OD engagement. And right now, the uncertainties individuals are facing are unprecedented, we cannot take for granted the impact it has on wellbeing. Elements of self-care should be present throughout these competencies as a preliminary way of connecting and working virtually. As we

# OD Portal Concept

1

OD Portal



2

Site Map - Content

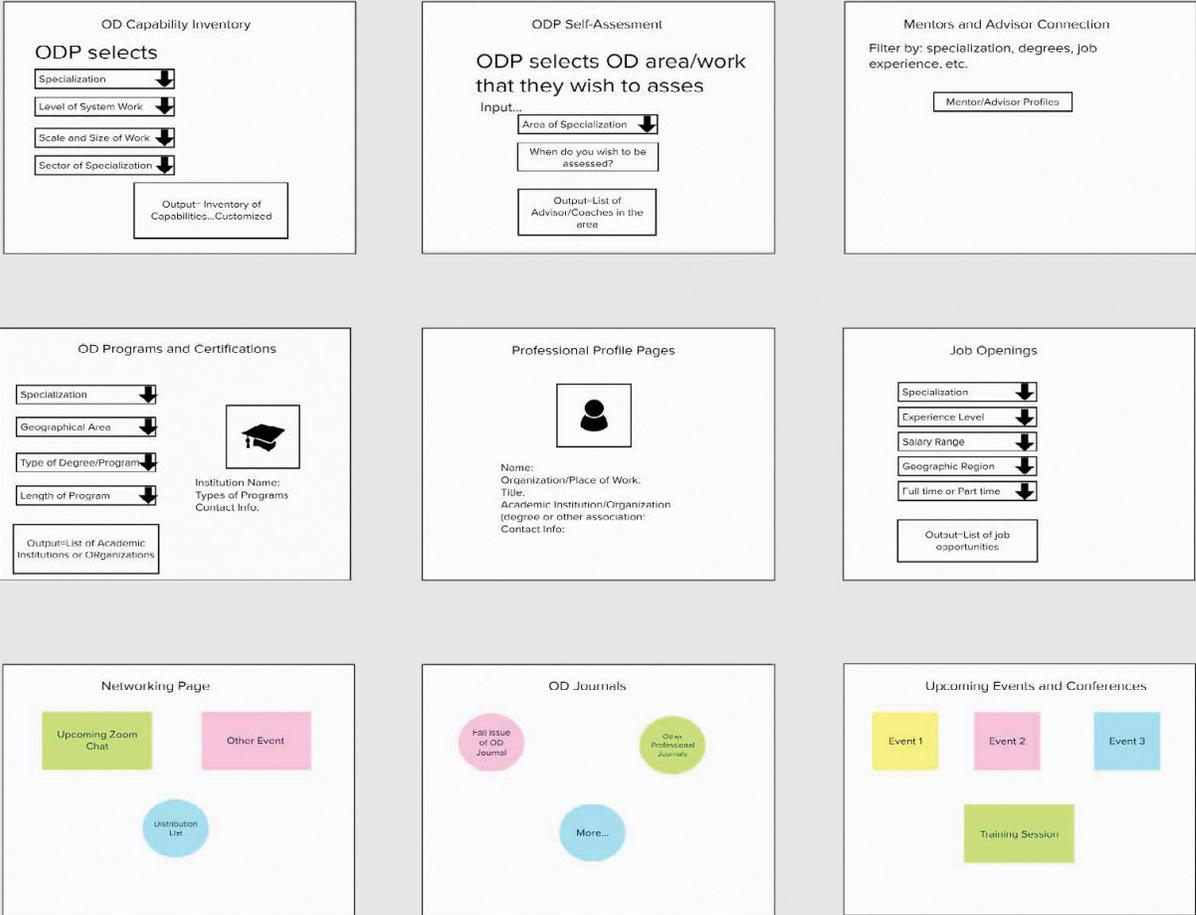


Figure 1: OD Portal Interface Storyboard

engage virtually and build authentic relationships online, more training and competency in this area is essential.

### The How: Reactions to Article and What We Would Like to See

Mee-Yan Cheung-Judge brings forth ideas around how to make use of the competencies. Our understanding of what the author proposes in our role as emerging OD practitioners is to use the competencies to map a path for ourselves in the OD field. As we visualize ourselves having just graduated, considering our next steps and what we would want to know, we imagine an online portal built for connection through competencies.

We envision a self-service career planning tool that enables connections to OD and each other. A unified place of information and people exchange, where tools can be crowdsourced and debated. We want the directory of LinkedIn with the search functionality of Google. In our minds, this would enhance OD practitioners' abilities to more effectively represent the field by creating connections between students and programs and expanding networks and access for ODPs to evolve as they move forward in their careers. With raised awareness of career paths and specialties, the field would be better for it.

### The OD Portal Concept

The OD Portal concept is an online platform that offers ODPs a one-stop-shop site. Practitioners of all levels of experience can

complete a self-assessment of OD capabilities, find specialization paths, connect with other ODPs, match up with mentors/advisors, find academic programs and professional certifications of interest, OD events, training, and more. All resources coming together in one place. The portal would be a resource we wish existed today, as we finish our program.

### The Portal May Include the Following Areas:

- » OD Capability Inventory
- » ODP Self Assessment
- » Mentor/Advisor Connection
- » OD Programs and Certifications
- » Academic Program and Certification Profile Pages
- » Professional Profile Pages
- » Job Openings
- » Networking Page
- » OD Journals
- » Upcoming Events and conferences
- » ODP Communication Network

### Conclusion

We understand and agree with Mee-Yan Cheung-Judge's desire for action around deciding and using OD competencies, and propose that these actions be done with an eye for OD done virtually. COVID-19 has impacted the workforce, and therefore our work, irrevocably. The conversations that have been had around OD competencies cannot be continued in the way they were. What the competencies are and how we bring them into practice in a way that reflects the current work landscape must

be different. The next generation of OD is graduating into a vastly different world, and we invite you to join us in it.

Welcome to virtual OD, we look forward to connecting with you on the portal.

### References

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### Extra Resource

COVID-19 Era Will Tell Us Much About Future of Collaboration Tools. *eWEEK*. <https://www.eweek.com/enterprise-apps/covid-19-era-will-tell-us-much-about-future-of-collaboration-tools>

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We envision a self-service career planning tool that enables connections to OD and each other. A unified place of information and people exchange, where tools can be crowdsourced and debated. We want the directory of LinkedIn with the search functionality of Google.