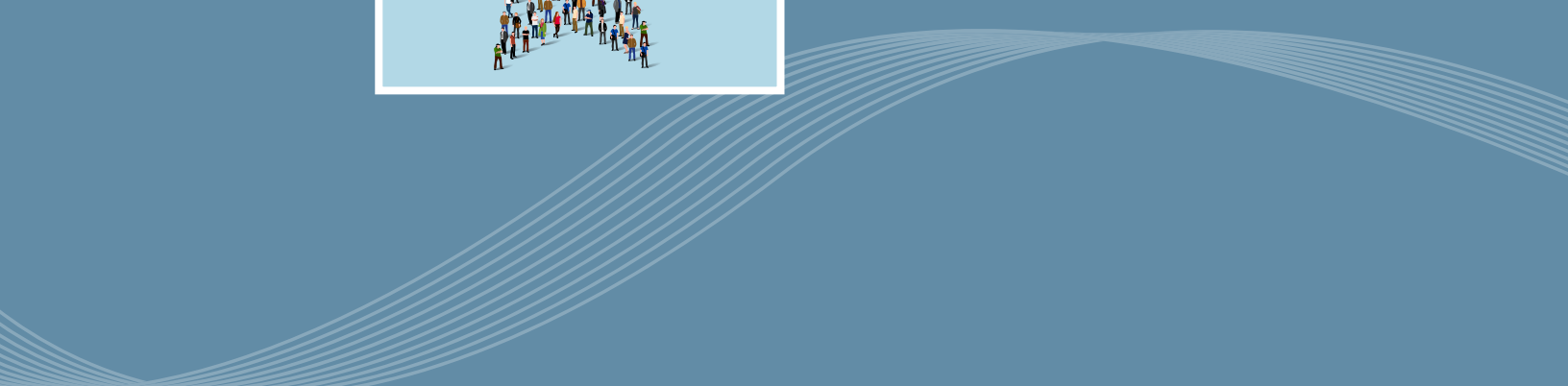
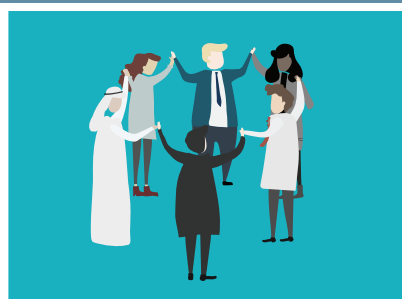




Global Use of Self (UoS) Research Report

Mee Yan Cheung-Judge, Ph. D and David W. Jamieson, Ph. D



Acknowledgements

We are grateful to the extensive global network of professional organizations and organization development practitioners (ODPs) who assisted us in distributing our survey to a significantly large population of ODPs and related practitioners. This extensive distribution provided the global sample and number of respondents needed to make this study a success. The list in **Appendix A** contains our sponsor/partner organizations that supported us in gaining access to our desired population. We thank the partners who made this project possible.

In the early days of getting organized we worked with 2 research associates at University of St. Thomas: Angela Ponrajah Bosco and Kejie (Jack) Ruan; and one researcher in the University Research Support Office, Xinyue Sui. These associates supported setting up the survey on Qualtrics for easy access to all the participants and engineered downloading the data for analysis. Jack replaced Angela when she moved back to her home country and assisted in the descriptive statistics on our sample and the initial factor analysis with Xinyue. We thank each of them for contributing their time and expertise.

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Finally, we want to thank those colleagues and family members who supported us during this two-year research journey. It is a miracle that we are at to this point. Three months after starting the research in 2017, Mee Yan was diagnosed with two types of cancer (one being a very aggressive form of lymphoma) which led her to two major surgeries and eight sessions of treatment. During that time, Dave was hospitalized three times because of his heart condition. While both of us kept ploughing on in between treatments and hospitalization, there were times we thought we would not be able to complete the research, let alone the research report. Therefore, it is to those who live and work most closely with us and who have supported us through each complication, that we would like to express our deepest gratitude to.

Global Use of Self (UoS)

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Introduction

1. Overview

The Use of Self (UoS) idea has been with the field of OD since its early founding, but has only small glimpses of conceptual grounding. Most of the learning and sharing was derived through practice and experience. Little clarifying work has been published and almost no research has been done. Many have learned about it and grown their Use of Self practice through mentoring and passed-down-wisdom from the founders and senior practitioners. Along the way, various aspects of the Use of Self have been brought forward in practice and literature, for example:

- a. Sam Culbert (1967) highlighted the roles of self- disclosure and feedback in understanding who we are. This was built on the earlier work of Luft and Ingram’s (1955) Johari Window focusing on interpersonal relations
- b. Bob Tannenbaum (1995, 1997, 2005) focused mostly on the human person and their awareness and development for doing helping work. Tannenbaum put great emphasis on relationships as the medium for our work, the whole person, and the interdependence of connections

in systems. He added a strong caution on the overuse of methods, tools and techniques, as a way to hide from, rather than use, ourselves.

- c. Herb Shepard (1975) shared his Rules of Thumb for Change Agents and listed eight rules, with some providing insight into the Use of Self, such as:

- Let your whole being be involved in the undertaking... it means a lot of putting together of parts that have been divided.
- Staying alive means loving yourself, and staying in touch with your purpose, using your skills, your emotions, your labels and positions ... it means not being trapped in other people’s games.
- Starting where the system is can be called the ‘empathy rule’... we need to understand how the clients see themselves and their situation, and need to understand the culture of the system, establishing the required rapport... even unwitting or accidental violations of the empathy rule can destroy the situation.

- d. Charlie and Edie Seashore (1997) brought clarity to the importance of choices.
 - e. Charlie Seashore and others (2004) discussed the conscious and unconscious aspects of self, including the positive aspects and aspects we dread or like less about ourselves. He also introduced the importance of agency and efficacy.
 - f. Use of Self has strong Gestalt roots (Nevis, 1987) that brought attention to the presence of the change agent in moving people through the Experience Cycle.
 - g. Mee Yan Cheung-Judge, (2001, 2012, 2018) highlighted ‘aware of’ and ‘use’ of our own emotional, perceptual and cognitive processes to create the impact that is needed in the system and bring our whole selves to the work we do.
 - h. NTL (founded in 1947) and the T-group was where individuals learned about how they were perceived and how they impacted others. Both of these experiences involved the Use of Self being brought into clarity and focus. Behavior occurring from group work highlight how people showed up, acted and were perceived. Self-expression and feedback were the currency for learning at the individual level, while the way the group functioned and developed gave insights into group dynamics. Both of these being keys to understanding people’s behavior. The learning, insights, choices and abilities to understand and develop aspects of the Use of Self became the developmental focus for many of these groups.
 - i. Warren Bennis (1985) carried Use of Self from his early OD work into his leadership thinking and writing in which self- awareness became a critical element
- (‘Know thyself’)
 - j. Warner Burke (1982), in his classic OD text, pointed out the importance of one’s instrumentality in conducting both diagnosis and intervention.
 - k. Ted Tschudy (2006) discussed how the practitioner grows more conscious in using their intent to impact on the situation. This will require OD practitioners to be able, willing, and committed to build trusting relationships with those they work with. Trusting relationships require us to stay authentic, congruent, open, and transparent – which often emerges from deeper inner work.
 - l. Jamieson, et. al. (2010) created the first competency model of Use of Self to highlight what we need to do in the continuous Action Learning Cycles that each situation presents. From these cumulative experiences, we learn about ourselves and our impact. We reflect on our choices, actions, and intentions to build our repertoire of who we are and how we behave. Jamieson and Davidson (2019) added further clarity to the Use of



Self Action Learning Cycles around what makes up the ‘self’ that we can use to develop greater awareness and skills.

- m. Minahan and Forrester (2019) describe the meaning and progression of Use of Self based on the framework of Arthur Young’s Process Theory, as a back-and-forth dance between freedom and constraints. The framework is based on the work of Edie and Charlie Seashore

To be effective, OD practitioners need to be able to trust their own inner resources, make discerning judgments in the ‘here and now’, stay choiceful in their behavior, and selective of the intervention which may work best in a unique context to achieve the desired outcome. This state of being calls for a level of integration of who we are with what we have within – pulling ourselves together as an instrument to serve others. Tannenbaum and Hanna (1985) summed this up succinctly by describing that the Use of Self requires:

- a. social sensitivity,
- b. an ability to accurately read the environment, and
- c. a high degree of action flexibility (having the capacity to act in different ways as appropriate to the situation).

To Tannenbaum and Hanna, the Use of Self is much more than mere technique, rather it is an approach, developed as a mindset and skillset over time, that emanates from the core of the person.

2. The Concept of Use of Self and its Origin

But where did it all start? Regardless of various claims around the origin of the Use of Self, we must go back to the theories and

fields of Gestalt Psychology and Gestalt Therapy. Both fields emerged in the 1800s as an effort to put psychology on the map of investigative science. This emergence, together with a well-intended departure by a group of philosophers, psychoanalysts, and scientists from the 19th century medical view of psychoanalysis, of which Freud was the main proponent, gave birth to most of the central tenants behind the formulation of the Use of Self concept. Full details of the role of Gestalt Psychology and Psychotherapy are documented by Cheung-Judge (2019), in the book *Gestalt Practice: Living and Working in Pursuit of Holism*, edited by Mary Ann Rainey and Brenda B. Jones. Those who played a key role in shaping the central tenets of Gestalt Therapy include Max Wertheimer, Kurt Koffka, Martin Buber, Wolfgang Kohler, Kurt Lewin, and others.

In our search for Use of Self literature (detailed in Section II.3), we found 60 ways authors defined, described and talked about Use of Self. The frames and lenses through which the Use of Self was explored varied from purely psychological discussion of the ‘self’ to descriptions of what values, characteristics, mental models, core skills, and levels of self-awareness around specific



behavior were central to the masterful Use of one's Self. The following examples represent the better-known descriptions and definitions of Use of Self.

- a. "The use of self is the way in which one acts upon one's observations, values, feelings and so forth, in order to have an effect on the other." Nevis (1987:125)
- d. "The OD practitioner is not only to stand for and express certain values, attitudes, and skills, but to use these in a way to stimulate, and perhaps evoke from the client, actions necessary for movement on its problems...the aim is to take advantage of the issues of differences, marginality, and attraction by the client so as to use oneself in the most powerful way." Nevis (1987:54)
- b. "Use of self is the conscious use of one's whole being in the intentional execution of one's roles for effectiveness in whatever the current situation is presenting. The purpose is to be able to execute a role effectively, for others and the system they're in, without personal interference (e.g. bias, blindness, avoidance, and agendas)... to have clear intentions and

choice." Jamieson, Auron and Shechtman (2010:5)

- c. "To be able to be relevant in the here and now takes a person who is centered, sensitive and flexible who has tolerance for ambiguity and who can stay with the immediate situation and help those with whom s/he is working to flow once again with the river." Tannenbaum (1997:173)
- d. "The simplest way we know to talk about Use of Self is to link the concepts of self-awareness, perceptions, choices and actions as the fundamental building blocks of our capacities to be effective agents of the change. Hopefully to make a better world and to develop our own potential for doing so to the fullest in the processes." Seashore, Shawver, Thompson and Mattare (2004:42)
- e. "Use of self consists of intentional, conscious and deliberate choices which result in action/behaviors taken to bring about change." Seashore, Shawver, Thompson and Mattare (2004:44)
- f. "Use of Self is acting on feelings, observations, and thoughts to advance the work of the client." Rainey and Jones (2014:107)
- g. "Use of Self is the process of acting upon a complex set of factors related to the consultant, client and the practice of OD. It requires attending to self and client while honouring the values that are fundamental to OD... Use of Self is the integration of consultant (values, assumptions, beliefs, biases, tendencies), client (attending and engaging with integrity and purposeful intention) and OD (values, principles, theory, practices)." Rainey and Jones (2014:114)



3. The Nine Clusters Grid

From the 60 descriptions and definitions of the Use of Self, Cheung-Judge and Jamieson (2018) sorted through the specific

dimensions to organize the defining themes of the Use of Self into clusters with similar meanings. Further details on the nine categories can be found in Cheung-Judge and Jamieson (2018).

Table 1: A sample of 9 clusters with dimensions extracted from 60 descriptions of Use of Self

1. Cognitive Cluster	2. Affiliative/Emotion Cluster	3. Courage Cluster
<p>Cognitive power to sift through data</p> <p>Strategic insights in seeing the whole system</p> <p>Ability to frame and reframe clients' issues</p> <p>Deep Knowledge of our trade</p> <p>Perceptual insights of situational dynamics</p> <p>Able to separate data from interpretation</p> <p>Is a Systemic thinker</p>	<p>Being empathetic</p> <p>Holding positive regards of people</p> <p>At ease in showing compassion to others</p> <p>Showing grace for others</p> <p>Paying attention to emotional reaction (self and others)</p> <p>Able to sense the level of safety people need to do the work</p> <p>Not afraid to show emotion at work</p>	<p>Sense of self-efficacy</p> <p>Sense of self-agency</p> <p>Able to take evocative and provocative stances when necessary</p> <p>Dare to differentiate and hold one's own opinion</p> <p>Ability to engage in straight talking and point out the unspeakable issues</p> <p>Courage to put self on the line</p> <p>Champion partnership at work with clients</p> <p>Humanitarian value</p> <p>Committed to scientific inquiry</p> <p>Hold strong client centric value</p>
4. Character Cluster	5. Skills Cluster	6. Values Cluster
<p>Trustworthy</p> <p>Shows humility</p> <p>Respectful to others</p> <p>Desire to serve others</p> <p>Relationship centric – build good connection with others</p> <p>Sensitive to the flow of feedback</p> <p>Desire for continuous learning and growth</p> <p>Attempt to be non-judgmental of others</p> <p>Have patience to watch the unfolding of events</p>	<p>Good listener</p> <p>Tolerate confusion and able to work with ambiguity without rushing clients to come to pre-mature decision or action</p> <p>State things succinctly, clearly and directly</p> <p>Able to take advantage of issues of differences marginality,</p> <p>Capable to take risk to achieve result</p> <p>Able to do experiments on the go</p> <p>Use inquiry in relationship building</p>	<p>Appreciation of diversity</p> <p>Commitment to Equality and inclusion practice – as well as justice and fairness issues.</p> <p>Commitment to using democratic processes</p> <p>In a learning and developmental stance</p> <p>Champion partnership at work with clients</p> <p>Humanitarian value</p> <p>Committed to scientific inquiry</p> <p>Hold strong client centric value</p>
7. Self-work Cluster	8. Discipline (self-management) Cluster	9. Continuous self-work and growth Cluster
<p>Aim to do work to deepen our sense of awareness of self and others; managing boundaries</p> <p>Work to be authentic and transparent</p> <p>Being congruent</p> <p>Call for mindfulness</p> <p>Continue to work on unresolved issues in own life</p> <p>Willing to invest in doing our own inner work</p> <p>Knowing how to stay choiceful and intentional</p> <p>Commit time for self-care</p>	<p>Undertake supervision</p> <p>Practice those skills that have high impact on others</p> <p>Cultivate those habits that will increase the ability of generative thoughts and emotional renewal</p> <p>Practice relating to others without judgement</p> <p>Learn when to share (or not to share issues)</p> <p>Stay non-reactive to challenging situation and people</p> <p>Can separate serving my needs from those of the clients</p>	<p>Continue to do deeper inner self-work</p> <p>Seek feedback and learning opportunities – willing to undertake supervision</p> <p>Continuous development of trade knowledge</p> <p>Continuous development to increase cognitive, perceptive, and affective capacity</p> <p>Reflective practitioners</p> <p>Track how one's behaviors/habits impact others</p> <p>Consciously develop presence through more integrative work</p>

4. In Summary

From the wealth of the definitions of Use of Self, we consider Use of Self to be in flow when we use what we know about ourselves to intentionally draw on aspects of our whole selves to positively impact the current situation through providing service, helping change, and assisting others. To achieve this state of Use of Self flow involves us

- a. taking time and effort to know ourselves (both the positives and less desirable parts),
- b. assessing each situation we enter in terms of the other(s) present and context factors,
- c. ascertaining what is needed,
- d. determining our intention,
- e. weighing our capabilities,
- f. seeing and selecting from choices, and
- g. paying attention to what we may need to consciously manage about ourselves for the good of the situation.

Our use of self begins with our self-awareness, what we know about who we are. This includes how well we know our whole self; our personas, shadows, personality, styles, attitudes, values, knowledge, skills, and identities. How much each of our 'self' components show up affects what we see, how we know, what we do, and ultimately how we execute our roles.

Our self-understanding is a critical element to our successful Use of Self. Without it we fly blindly, not knowing why we do what we do or think what we think. Our self-understanding provides the base for using

our selves through engaging the parts that we must use and managing other aspects of ourselves to be most in service to others. Without self-understanding we cannot be intentional in making a choice, most often because we are unaware that there is a choice to be made. We can also hold ourselves back due to fears, lack of confidence, or unclear purpose. We learn most of these insights through listening to feedback from others that know and see us working, and from those who experience our Use of Self.

Since most OD Practitioners work is done "in the moment," it is the sensation and choices we make in the moment that helps us the most. Hence it is important that we learn how to stay conscious and intentional in that moment to what we are bringing forth, how we stay on target, and how we self-manage aspects of ourselves that hinder our intended behavior. Use of Self is comparable to a marathon movie, where various themes run through a multitude of storylines that emerging over time. At any given point we only see one frame, but we will mature as the movie unfolds. Our Use of Self is a lifelong journey guided by our motivation to learn and master how our self is used in service of our work.

What appears to others as simply 'showing up' is in fact a complex process, that is if we choose to take an intentional approach to our Use of Self. Jamieson, et. al. (2010) sums this up nicely -- Use of Self is "the conscious use of one's whole being in the intentional execution of one's role for effectiveness in whatever the current situation is presenting."



Background to the Research

1. Research Intention

When we first discussed this project, we had many conversations about the ‘why’ and ‘what’ of the research task at hand. In the end, we arrived at a clear set of purposes to guide our research:

- a. To ground the Use of Self theory/practice within data to remove the vagueness and abstraction currently associated with the concept.
- b. To learn about patterns and themes that emerge about the strengths, weaknesses, and areas of further development within Use of Self
- c. To explore opportunities and pathways needing development to support OD Practitioners to make better ‘use of themselves’ as they develop their Use of Self practice.
- d. To make recommendations about targeted learning processes that could be introduced and used by the numerous educational programs around the globe to support educating the next generation of OD professionals.

2. Choice to go Global

We intentionally selected conducting this research globally because the field of OD is growing around the world.

- a. The Use of Self concept has strong philosophical European roots, and most of the OD literature is US-based – is this concept understood and applied by others outside the English-speaking world?
- b. The field of OD is growing around the world, with phenomenal growth in China, multiple parts of Asia, and Latin America – we like to know how OD colleagues in those part of the world think about this concept.
- c. We want to expand our understanding on how the concept varies cross-culturally or how its conceptual core is being held across cultures, or not? We hope a global sample will give us glimpses of this matter.
- d. Finally, since most of the survey would be quantitative, we needed to access a large enough sample to reach levels of validity that is needed for credible results.

The comprehensiveness and broad inclusion of this global study has brought greater clarity to the concept from mainly OD Practitioners (and other professionals with OD experience) and will provide greater knowledge of and experience with how the Use of Self is working in action. We believe what emerges from this study can be used by all professionals who desire to develop and use themselves in their work beyond the USA and UK.

3. Literature Research and Survey Development

We began the research process with an extensive literature review across a variety of disciplines where Use of Self thinking, and concepts had been generated. The review included literature from anthropology, sociology, social psychology, psychotherapy, psychology, organization development, social work, and from whoever wrote about self, the impact of self and the Use of Self. As a result, we found over 100 definitions, descriptions, and discussions on the Use of Self concept. Each literature had a different spin on the role of the self, evolution of the self, and how the self can be supported to shift direction and how self can regulate oneself to fulfil its own effective functioning. As we worked through these 100 some definitions, they were distilled down to 60 descriptions of the Use of Self, nine specific dimensions emerged which we organized into themed clusters to provide coherent meaning across the various items (see section 1.3; Table 1).

Our initial design of the survey items used the nine dimensions of Use of Self from the literature and our own conceptual understanding and experience with the topic. To keep the number of sections manageable and not over-complicate the survey for respondents, we collapsed the original nine categories into five sections of scaled

quantitative questions, four sections for longer qualitative expansion of the concept, and one section for initial assessments of impact experiences from the respondents' optimal use of self. To support the respondents, each section was assigned a simple label as follows:

- a. Characteristics & Values (about you)
- b. Continuous Self-Work (inner work, self-management habits, self-care)
- c. Practice Skills, Abilities & Competencies (cognitive, affiliative/emotional use, skills and execution competencies)
- d. Life-Long Development Practices (intentional efforts to continuously improve areas listed above in A-C and your field of knowledge)
- e. Experiences of Use of Self (impact on self and others when Use of Self is in optimal form)

We used the 5-point Likert scale to measure *how well*, *how much*, or *how often* items within the survey were true for each respondent. This allowed us to produce meaningful means when analyzing various aspects of the quantitative data.

Qualitatively, we designed seven open-ended questions. One of these questions invited respondents to share their definition of Use of Self, while the remaining six questions explored deeper intricacies of the concept and practice.

The structure of the survey divided up the 119 quantitatively-scaled items (how well, how much, how often) into the five sections, with one open-ended qualitative question at the end of each section. This structure invites respondents to add anything they believe

might be missing in the survey and they have been saved for use in future survey revisions.

The final research survey had the following components:

- a. An invitation letter with the instructions, background, purposes, and planned outcomes of the research.
- b. An IRB Consent Form.
- c. A voluntary invitation to share name and email, if the respondent wished to receive a copy of the summary and was willing to be included in a brief follow-up interview (none were conducted)
- d. A set of demographic questions that included
 - the country of primary residency;
 - gender identity;
 - race/ethnicity identity;
 - years of OD practice and experience (internal and external);
 - levels and types of education;
 - and finally, which organization/person they received the survey through.
- e. An open question asking respondents 'how they define or describe Use of Self' (Q7A)
- f. Five sections of likert-scaled quantitative items (listed above)
- g. Six open-ended qualitative questions:
 - What impacts do you personally feel your best Use of Self creates

for others?

- What barriers (from yourself) do you think are most common in hindering your best Use of Self?
- What barriers (from others or the situation) do you think are most common in hindering your best Use of Self?
- What do you think are the top priorities you have in developing the effectiveness in your Use of Self? And what type of development activities may be appropriate to support you in doing so?
- What are some of the more regular activities you do to improve your Use of Self?
- What self-care habits have you developed that help you to maintain your energy, focus and sharpness?

4. The Sample

The target sample for participation in this research was any practitioners (primarily Organization Development, and secondarily Human Resources, Leadership Development, Talent Management professionals, etc.) with a minimum of five years of OD practice experience from around the world. To reach this sample we first decided to target academic institutions that trained them, certificate programs that equipped them, providers that ran workshops and programs to refresh and upskill them, organizations that have substantial internal OD professional groups (or their own academy), and key professional networks around the globe with a large number of members and affiliates.

Next, we sent each targeted organization/group a letter asking them to be our research project sponsors and partners, not financially, but by distributing our survey link to their constituents. Most of the sponsor organizations (not exclusively) came from US, UK, South Africa, Philippines, Singapore, China, and other Asian countries. In the end, while we sent the survey to 60 sponsoring agencies, the data revealed that the survey had reached members from 74 organizations or groups. These organizations accounted for the wide-spread distribution of most of the surveys participants received. The list of our sponsor/partners is included in Appendix A.

After connecting with organizations, we began to use personal and group social media (LinkedIn, Twitter, Facebook, WhatsApp, WeChat) platforms to offer participation to anyone who met the criteria of 5 or more years of OD practice. We further shared the survey with our personal network lists.

Finally, we asked anyone who received an invitation letter, from any sponsor, to pass on the link to others within their professional networks, extending the reach of the survey beyond our primary contact point and the organized institution populations.

After choosing a closing date for the survey, we reviewed all submissions to determine the quantity of useful surveys submitted for this study. We chose to exclude questionnaires that were only partially completed with the intent to keep our data balanced and complete. We did, however, include questionnaires where the respondent completed all the scaled items to provide us with higher numbers to support the quantitative numbers and the initial factor analysis (which determined how the items clustered together).

We note here that multiple respondents didn't answer the demographic questions, either for privacy concerns or personal reasons where respondents may have not wished to categorize themselves in common demographic ways. This made two aspects of the data analysis challenging. Mainly it makes any synchronization and analysis across cultures almost impossible, secondly the numbers stated in the report may appear different between questions as the demographic information from the respondents are inconsistent. However, please be assured that with all quantitative items having large enough samples sizes, high validity in our data analysis is still achievable. As for qualitative questions all individual responses were used regardless of inconsistent demographic data and the large enough number of statements help to give clear patterns.

Our final Sample resulted in the following descriptions.





Demographic Descriptions

During the first round of data analysis, we wanted to explore the overall demographics of our respondents and create sub-groups that would help our analysis. To do this we ran descriptive statistics on the sample with

coded demographic items. Please note that some of these final respondent numbers and percentages differ slightly from earlier numbers presented by Cheung-Judge & Jamieson (2018). Further analysis provided more accurate results.

Table 2. Highest Country Breakdowns (with double-digit numbers or greater)

Country	Number	%
US	236	33.5
UK	200	28.4
Singapore	61	8.7
China	32	4.5
S. Africa	24	3.4
India	16	2.3
Netherlands	13	1.8
Canada	13	1.8
Philippines	12	1.7
Australia	11	1.6
Other Countries (with single-digit numbers)	Approx. 35 countries Approx. 86 people	12.2
Total	704	100%

1. Countries Involved (self-identified)

Respondents received their surveys through the extensive global network of partners and sponsors described above, in section II.4. In total, 74 organizations and individuals were identified as survey-sources by the respondents.

We have a total of 704 respondents from 45 countries being represented. But by asking people to voluntarily self-define their primary residence, respondents provided a variety of answers, with some skipping the question.

The largest number of respondents came from the US with 236, followed by the UK with 200. The rest came from Singapore, China, Canada, South Africa, India, Netherlands, Philippines, and Australia, and other countries with single-digit numbers.

While there are inconsistent country identifications, which led to varying specific sample sizes used in individual questions, we are grateful that these high numbers are valuable in getting a large amount of data that helped to support valid analysis and greater credibility of our findings.

Figure 1. Respondents by Country (showing global spread with approximate numbers)

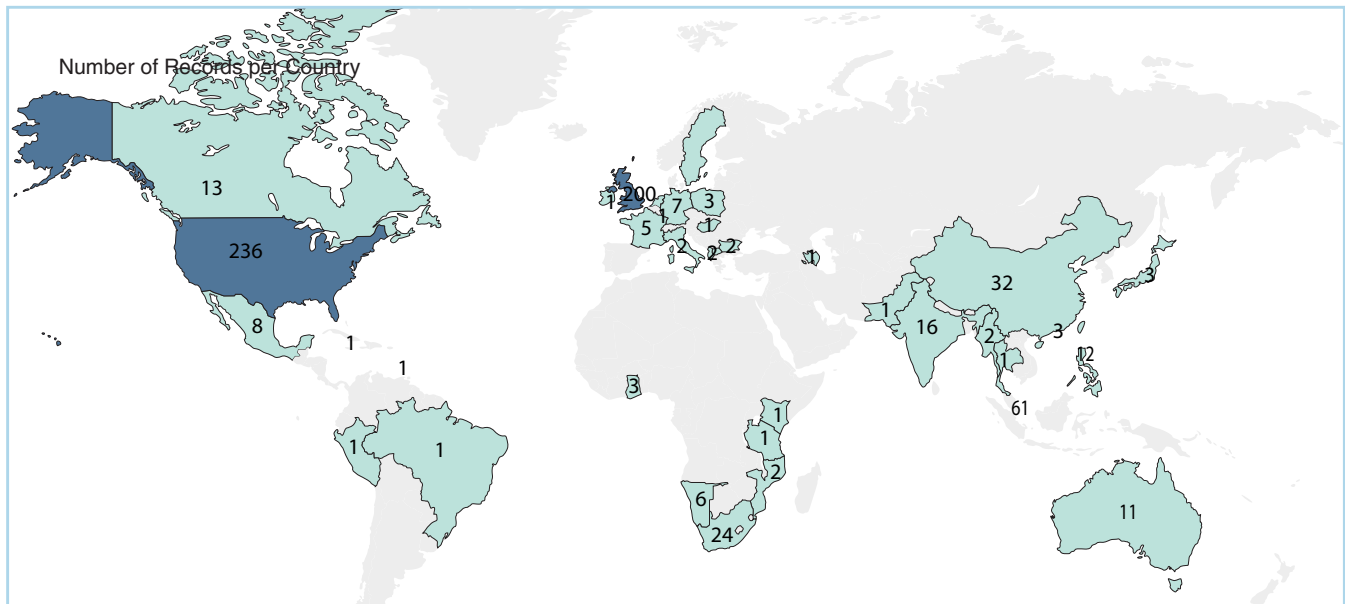
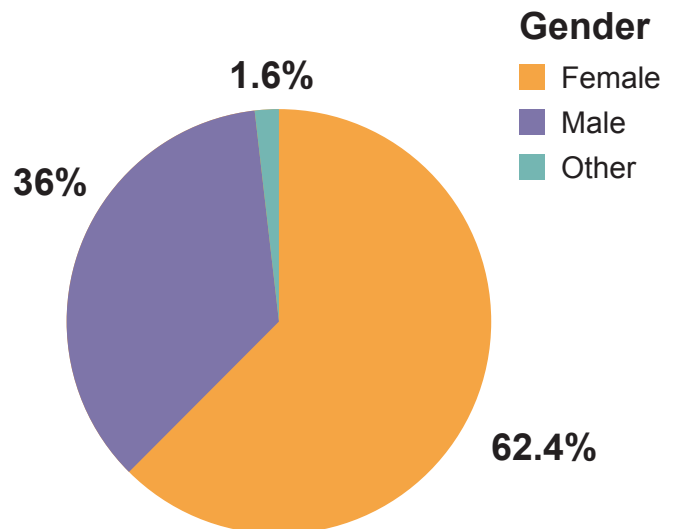


Figure 2. Gender Demographics

2. Gender (self-identified)

The respondent population was 62.4% female (430), 36% male (248), and 1.6% other (11). 15 answers were left blank, therefore removed, leaving us with the total number used in gender analysis of 689. Notably, the female/male/other demographic percentages are in line with previous demographic descriptions of the OD field.



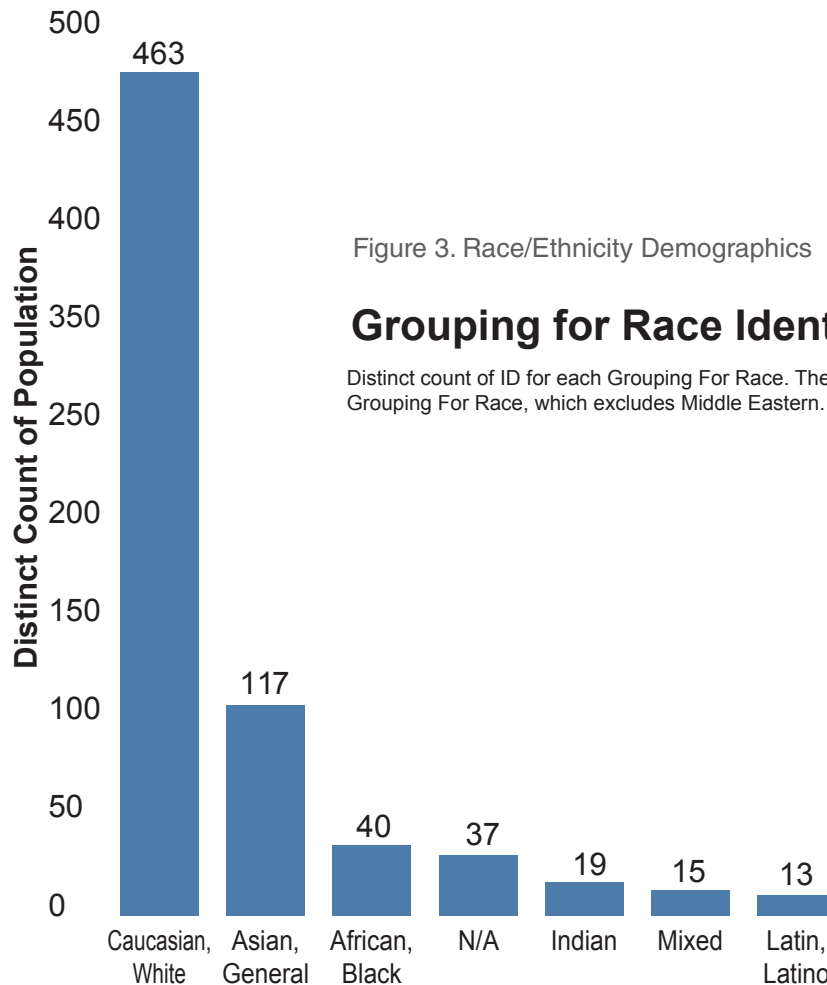
3. Race/Ethnicity (self-identified)

The racial/ethnicity answers by respondents revealed 54 unique identities. Many of the 54 unique identities were not widely shared amongst respondents. Therefore,

for purposes of presenting the data in an organized way, broader categories were created to group respondents. In total, 668 respondents were placed into the group designations with approximately 36 survey submission unanswered or unintelligible.

Table 3. Race/Ethnicity Demographics

Race/Ethnicity Category	Number	%
Caucasian/White (all types/countries mentioned)	463	65.8
Asian-General	117	16.6
All Black categories	40	5.7
Indian	19	2.7
Mixed	15	2.1
Latin/Latino	13	1.8
Not answered	37	5.1



4. Years of Experience (self-identified)

This question requested respondents to self-report the number of years they have practiced OD, either as an internal or external practitioner. In Table 4, this data is

captured in 6 distinct categories. In total, 696 respondents answered this question. Notably, the research population shows a much larger set of early and mid-career professionals (5-30 years) than those having 30+ years of practice.

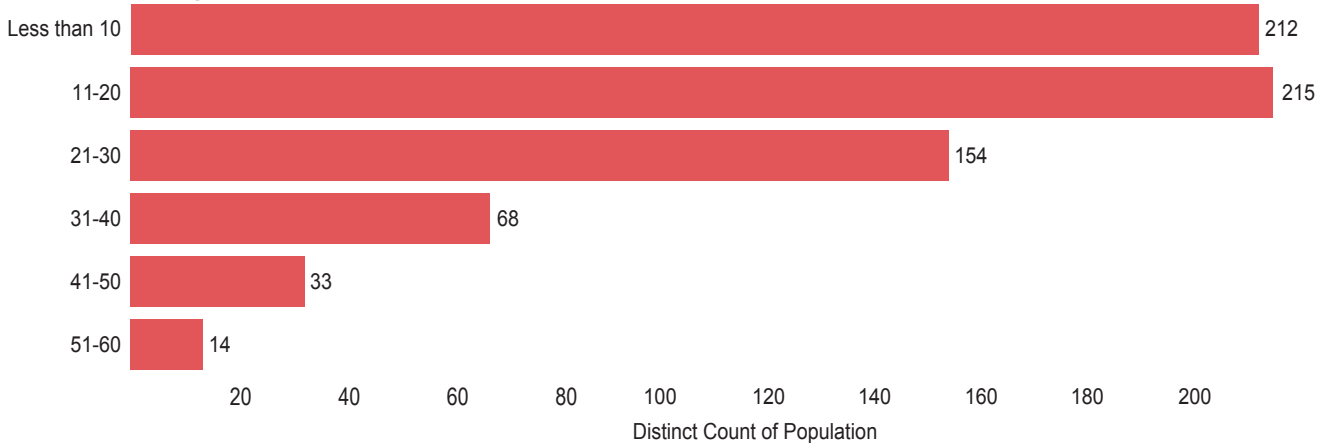
Table 4. Years of OD Experience

Years of Experience	Number	%
Less than 10	212	30.5
11-20	215	30.9
21-30	154	22.1
31-40	68	9.8
41-50	33	4.7
51-60	14	2

Figure 4. Years of OD Experience

Years of Experience (OD)

Total Year Group



5. Levels of Education (self-identified)

For years of OD-related education and/or training, respondents received highest points for degrees (doctorates and masters) and then certificates, followed by formal and informal workshops. The range of total points then ranged from 2 to over 20 depending on the mix, levels and number of education experiences.

To organize and present the widely varied data of OD education, we created a point system, assigning one to four points on the intensity and depth of OD educational endeavor. We note that this demographic category does not imply anything about one's quality of knowledge or skills, just how much and what type of 'educational endeavor' they have undertaken.

The coding was outlined as follows:

- a. 4 Points - Doctorate Degree
- b. 3 Points - Master's Degree (bachelor's degrees were excluded from the code)
- c. 2 Points - Professional Certificate(s) (NTL, OD, other professional organizations)
- d. 1-4 Points - Unique score awarded for number of informal workshops/trainings.
 - 1 Point - 1 to 2 Experiences
 - 2 Points - 3 to 5 Experiences

- 3 Points - 6 to 10 Experiences
- 4 Points - Over 10 Experiences

We coded each individual by giving higher points for degrees and substantial professional certificates (multi-session comparable to master's degrees) and lower points for informal workshops. Further criteria included counting if a person was *currently enrolled* within a program and if they had *multiple degrees or certificates* mentioned, they were counted. The coding is additive.

For example, the coding of a respondent with a doctorate, masters, major certificate and extensive workshops would produce $4+3+2+4=13$ points (top codes added up between the 13 and 20). Alternatively, a respondent with fewer educational endeavors could have two informal trainings for a total of 1 point.

Finally, after assigning a unique code for each of the respondents who submitted their answer, we developed a system to categorize the sample's results which would allow us to present the data in an organized way.

- a. Category 1 for **0 - 5 points**
- b. Category 2 for **6 - 10 points**
- c. Category 3 for **11 - 15 points**
- d. Category 4 for **16 & over points**

Table 5. Levels of Education

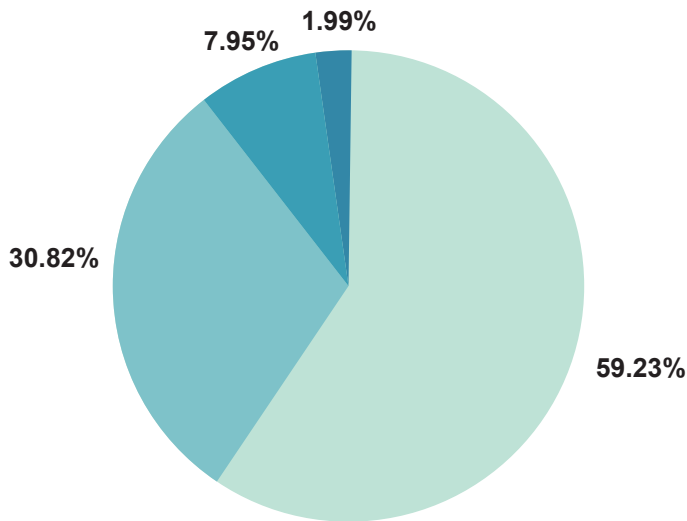
Level of Education Category	Number	%
Category 1 (0-5 points)	417	59.2
Category 2 (6-10 points)	217	30.8
Category 3 (11-15 points)	56	8
Category 4 (16 & up points)	14	2

do yield higher overall scores in various Use of Self measures.

Figure 5. Levels of OD Education

Level of Education Category

- Category 1 (0-5 points)
- Category 2 (6-10 points)
- Category 3 (11-15 points)
- Category 4 (16 & up points)



The results of the coding system reveal a population that is weighted towards less formal education endeavors, with professional certificates and numerous workshops/activities in their early careers. Later, there is evidence that the levels of education in OD,

6. In Summary of the Demographic Data

The global mix of respondents in this survey shows us that there are a wide range of people practicing OD – in over 45 countries. The gender and racial/ethnicity demographics reveal a diversity of people who are drawn to the practice of OD, and also how the values of OD support a range of work in organization effectiveness. The educational data may be explained by the limited formal education options outside of the United States (for the past 40 years) and the pattern of people joining the field of OD from other professions first (therefore not engaging in extensive formal training). OD has always been both a professional and personal field, which draws people interested in continuous development in the organizations they serve as well as their own growth.

As we explored the quantitative data in the next section, we will get to have more in depth data on their experience and perception of Use of Self.



IV

Quantitative Data



1. Factor Analysis

We performed an exploratory factor analysis (Fabrigar and Wegener, 2012) to determine possible structures and correlations within the large amount of data. The analysis is done by assigning each item into appropriate clusters, with levels of loadings and unearthing patterns that organize how items clustered and varied across participants. This is particularly appropriate when researchers, begin with unclear expectations about the underlying structure of the items used. When factors have been identified, the researchers investigate what items make up each factor and provide it with a name.

The goals in using factor analysis:

“...one question that often arises is whether a large set of data can be more parsimoniously represented. That is, researchers want to know what the underlying structures of association are... for a set of measures items... Specifically, factor analysis refers to a set of statistical procedures designed to determine the number of distinct constructs needed to account for the pattern of correlations among a set of measures... factor analysis is used to determine the number of distinct

constructs assessed by a set of measures... factor analysis provides information about... the number of common factors underlying a set of measures... (and) also provides information to aid in interpreting the nature of these factors... by providing estimates of the strength and direction of influence each of the common factors exerts on each of the measures (items) being examined. Such estimates of influence are usually referred to as factor loadings.”

Using exploratory factor analysis is a standard practice used to analyze surveys with numerous items. The process starts by a software distributing items across the most logical number of factors. The software then calculates the strength of item loading on factors that emerge to create the strongest factors. Using this process, we were able to determine a valid measure (with our large numbers of respondents) for statistically-based patterns among our survey items. The process also eliminated any items that provided little discrimination by not loading with any strength on any of the factors or loading on multiple factors. These outcomes mean the item does not distinguish a specific alignment with a specific cluster of items with regularity. In the end, we were able to

determine which items were most useful in determining the underlying structure of distinct constructs within our survey answers. Common practice accepts factors with loadings around or above .30 as statistically significant. For most of our factors we were able to include only items with higher loadings (.50 and above), while we included only a few that loaded around the .30 mark, with lower or no loadings on any other factors. Our next step for reviewing all five factors included undertaking further analysis of the patterns and themes, removing any duplicates that emerged within a factor, and cross-checking items loading high on one factor to ensure they weren't duplicated on other factors. As a result of these detailed processes we have

confidence that the independence among the factors is good. Also noteworthy is a very low correlations among our final factors which provides further credibility by indicating their independence.

Another key learning for us has been which questions are useful to keep and which can be discarded to shorten the survey instrument in future versions. We started with 119 scaled items and, through our analysis, scaled down to 95 used in the final factors. Table 6: The Five Factors, highlight our naming and descriptions of the five factors, followed by further explanation and interpretation of how the five factors contribute to our understanding of the concept of Use of Self.



2. The Five Factors

Table 6. The Five Factors

Factor Number	Name	Description
1	Using Cognitive and Emotional Skills with Courage to Serve Dynamic Systems	This factor captures most of what “others” see in ODP in a number of areas in their Use of Self. It highlights how respondents realize that when they use their cognitive abilities, in-depth knowledge of the trade, and skills through helping to provide understanding of the system; knowing how to position themselves; be adaptable in responses; seeing self, other, and an affiliative context, especially in interacting; and courageously using self to disrupt, stimulate, and challenge the system, others will then see Use of Self in action.
2	Attention to Relationship-Centric Values & Behavior	This factor focusses on how important interpersonal relationships are as part of our ODP work: having affiliative capabilities, demonstrating collaborative/partnering behaviors, proactively making emotional connections, and showing concern for the other’s well-being and being very conscious on how they show up.
3	Self-Management in Emerging Situations	This factor emphasizes the importance of self- management in the “here and now” moments, for example - maintaining boundaries, managing emotions, staying grounded and confident, keeping one’s own energies and focus sharp, believe in one’s abilities, being choiceful and intentional - all in service of the client.
4	Continuous Development of Self & Other Awareness	This factor captures the work and motivations involved with deepening our inner work, gaining awareness of self and others, working on unresolved issues, exploring less developed and shadow aspects of self, creating regular reflective practices, and finding ways to take care of one’s self.
5	Experiences of Best UoS Impact	This factor collects the types of experiences, feelings, and passions that are seen and felt within the practitioners when they are optimally using themselves, and by others around that are involved and being impacted.

The five factors tell a story of Use of Self. They reveal how Use of Self has both a front stage (how people experience our Use of Self) and a backstage (how we self-manage ourselves in various situations). In other words, the data highlights the significant factors that

affect how we show up in our work, while outlining our opportunities for development in preparing ourselves for this type of complex, systemic, and interpersonal work.

Effective Use of Self requires a powerful and

intentional interaction between practitioners and client systems. When we are competent and conscious about how we show up to support the system to help themselves, then they experience and witness the benefits of Use of Self through how we do what we do, show up, interact and be!

Factor 1 details the observations of those who see and experience our work, and therefore experience the results of our Use of Self in action. It outlines a mixture of knowledge, skills, discipline and courage needed to work in dynamic systems.

When ODPs focus on how they, through their competency and behavior turn their internal resources to serve the client in a way that can be seen, witnessed, and experienced by the system, effective results are more probable. The items in Factor 1 highlight the use of:

- a. cognitive and emotional skills
- b. thinking processes that help understanding and sense-making in dynamic systems
- c. courageous choices with behavioral flexibility

Table 7. Factor 1 Items: Using Cognitive and Emotional Skills with Courage to Serve Dynamic Systems

Number	Survey Q	Load	Item
1	Q92	0.725	I see situational dynamics and realities clearly
2	Q91	0.722	I am able to frame and re-frame issues in service of the clients' understanding
3	Q94	0.701	I can connect intent
4	Q75	0.628	I am a strategic thinker and can extract strategic implications in situations and see possibilities
5	Q74	0.628	I am a system thinker and can see and understand how the system operates
6	Q98	0.628	I am able to manage the roles and balance in the partnership with client
7	Q86	0.616	My ability to influence others works well
8	Q88	0.612	I manage issues of differences, marginality and attractions, involving clients and my self
9	Q84	0.607	I adapt designs in real time in service of the client and situations
10	Q85	0.599	I have good behavioural flexibility to adapt in any situation or changes

11	Q72	0.589	I am able to sort, organise data to ascertain patterns in situations
12	Q76	0.589	I can readily understand the business and context of the organisation
13	Q89	0.579	I can share observations in ways people can hear
14	Q90	0.575	I can use my courage to speak up, take risks or put myself on the line, as needed
15	Q68	0.574	I feel comfortable to take evocative and provocative stances when necessary
16	Q83	0.569	I have strong process design skills for serving clients
17	Q96	0.560	I function well working on the margin
18	Q87	0.554	I have a strong capability to facilitate others interactions
19	Q50	0.531	My ability to take risks is effective to the situation
20	Q71	0.519	Applying/adapting theory to situations is one way I guide my work approach
21	Q95	0.509	My listening helps the client to make personal sense
22	Q53	0.508	I am capable of straight talking and can use my openness and honesty to help disrupt the system
23	Q69	0.504	I am sensitive to social dynamics and able to track them in here and now
24	Q82	0.500	My ability to read other's emotions enable me to be effective in action flexibility
25	Q97	0.494	I can manage not being drawn into system politics

To sum up briefly - Factor 1 highlights the importance of using cognitive, knowledge and thinking skills in understanding what is going on and what it means. It also involves how one ascertains and manages emotions within all parties and manage their own boundaries and use of courage to take appropriate actions.

Factor 2 describes how OD Practitioners often ‘earn the right’ to help by using themselves effectively through putting themselves on the line to serve clients’ needs. When OD Practitioners possess client-based attitudes, they enact behaviors that predispose them to treat their clients in a relationship centric way, being able to give sufficient attention to support relationships as their top priority in their work. Through this approach, Use of Self will be experienced by clients in a personal way.

Table 8. Factor 2 Items: Attention to Relationship-Centric Values and Behavior

Number	Survey Q	Load	Item
1	Q24	0.630	I am compassionate to others
2	Q23	0.601	I tend to empathize with others
3	Q29	0.577	I make good emotional connections with others
4	Q11	0.576	I put high value in relationships, build and maintain good relationships with others
5	Q10	0.528	I have great desire and dedication to serving others
6	Q9	0.517	My behaviour shows that I am respectful of others
7	Q22	0.511	Being non-judgmental is a key trademark in my work
8	Q27	0.459	I practice participative democracy in all my work
9	Q17	0.452	I value humility in my working with others
10	Q13	0.434	Diversity, inclusion and equality inform my work
11	Q21	0.434	Humanitarian values are key reasons why I do what I do
12	Q18	0.420	I am committed to democratic values and use them in design of intervention
13	Q73	0.427	I regularly develop open, trusting relationships

14	Q60	0.417	I use inquiry in relationship building
15	Q25	0.405	I am attentive to how my and others values are operating and guiding behaviours
16	Q55	0.403	I have personal regard for others regardless of whether they are easy or difficult
17	Q77	0.388	I do well in partnering with others
18	Q93	0.373	I have good insight into the psychological safety needs of people
19	Q63	0.367	I regularly check myself on withholding judgement
20	Q19	0.343	I am committed to work and learn in partnership with clients
21	Q8	0.291	I am very trustworthy
22	Q20	0.286	My client centric values are actively reflected in my approach to consultancy

In Factor 2 many of the humanistic and relational values of the OD field have clustered to highlight the importance of paying attention to, and growing with, all aspects of relationships with key clients and others within the system. Factor 2 captures the generic relationship elements of trust, diversity, respect, empathy, humility, and partnership. In any helping relationship, it is the relational platform we build with clients that will earn us the right to influence, to engage in straight talking, and have the power to speak the truth. Intervening with courage will land well with the client when we have strong traction in our relationships with the system we support.

Factor 3 highlights the importance of self-management in the 'here and now,' especially in uncertain, dynamic and challenging situations. OD Practitioners understand they do not control how 'living system's' will react and behave when they begin an intervention, hence, they never know what may emerge and whether any of the processes planned will work out as expected. So being able to practice presence, regardless of the emerging situation, through managing our emotions, especially anxiety and fear, and holding back our judgement while continuing to stick to the path is an important aspect in an OD Practitioners work.

Table 9. Factor 3 Items: Self-Management in Emerging Situations

Number	Survey Q	Load	Item
1	Q.39	0.631	I am effective in managing myself (emotions, ego, reaction, etc.) when facing difficult and unexpected situations
2	Q56	0.490	In difficult moments, I can manage my emotions well.
3	Q40	0.488	I know how to stay intentional and choiceful in the present
4	Q.64	0.481	I am effective in keeping my emotions separate from clients work
5	Q16	0.479	When tough situations arise, my grounded sense of confidence helps me through
6	Q38	0.457	I have developed self-care strategies to ensure my energy and resource pool is always being refueled
7	Q48	0.420	I can separate serving my needs from those of the clients
8	Q41	0.388	I have a high sense of efficacy ad agency when facing challenging situation
9	Q97	0.381	I can manage not being drawn into system politics
10	Q26	0.366	I am patient and willing to wait for emerging realities
11	Q104	0.348	I make plans to take care of myself and regularly engage in self-renewal activities
12	Q42	0.323	I believe in my ability, capability to achieve good results for clients

Self-management is the focus of Factor 3. This includes how OD Practitioners manage their own emotions, reactions, feelings and self-care. Remaining intentional and choiceful in dynamic situations with unexpected emergence is critical, especially when those situations are important times to draw heavily on one's sense of agency and confidence. This factor outlines the balance needed between being authentic and true to ourselves with the choicefulness and appropriateness of our

response to the client in order to achieve the desired impact. Knowing one's own mental models, value system, vulnerabilities, and needs will help one manage oneself when events and people are not going as planned.

Factor 4 emphasizes the importance of motivation to continuously deepen our inner-work, grow our self-awareness, understand the self-other-context in systems, and develop ourselves to execute masterfully.

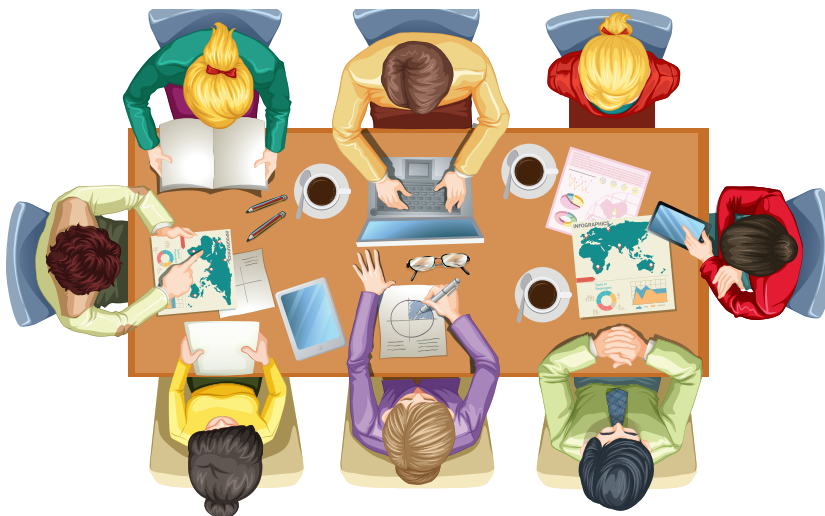
Table 10. Factor 4 Items: Continuous Development of Self and Other Awareness

Number	Survey Q	Load	Item
1	Q32	0.753	I work to deepen my inner work to grow self-awareness and understand who I am
2	Q35	0.750	I invest time and effort in continuing work on my unresolved issues that can interfere with my best work
3	Q33	0.718	I undertake personal work to stay authentic, real and transparent
4	Q34	0.712	I work continuously to achieve congruence with the various dimensions of my self
5	Q110	0.697	I consciously develop my presence through greater or deeper integration work
6	Q47	0.675	I have regular reflective practices (journal, special times, series of key questions...etc.)
7	Q101	0.668	I make it a habit to actively reflect on myself and work
8	Q45	0.657	I regularly work through my own vulnerabilities and fears
9	Q46	0.631	I stay alert to my unconscious or shadow aspects showing up in my behaviour
10	Q102	0.614	I often check myself on how my habits and default reactions impact on the needs of the client system
11	Q44	0.613	I work to learn how and why others behaviours and reactions impact on me
12	Q105	0.601	I have regular practices to attend to mindfulness and calming focus in preparing work
13	Q43	0.588	I stay curious about my evolving self
14	Q107	0.579	I give myself feedback so that I will keep working on my own issues
15	Q114	0.546	I regularly explore how to creatively use my self to help others
16	Q108	0.528	I use my experiences to improve my instrumentality

17	Q103	0.515	I consciously learn from others behaviours and reactions to me
18	Q104	0.509	I make plans to take care of myself and regularly engage in self-renewal activities
19	Q116	0.497	I work to expand my scope of understanding different paradigms, world views
20	Q 15	0.486	I am continually curious to learn more about my self to learn and grow
21	Q106	0.473	I actively seek feedback on my self & my impact
22	Q115	0.460	I work hard in managing boundaries in my work
23	Q31	0.395	I am aware of my self, strengths & less developed areas, motivations, fears, and passion

In Factor 4, the need for continuous self-development and growth of self-awareness is captured. This moment by moment stature is the critical back-stage work that keeps an OD Practitioner in the present, aware, sharp, and skillful. The indicators that score respondents high in Factor 4 would involve the respondents engaging in regular reflective practices,

knowledge and skill development, feedback, deeper personal inner work, and enhancing understanding of others and their behaviors. It encompasses all aspects of one's whole self, carrying one's on-going inquiry of who they are. This is also powerfully reinforced by the data analysis of Question 135 and 136.



Finally, **Factor 5** details how the impact and outcomes of Use of Self are understood, both as experienced by OD Practitioners themselves, as well as experienced by those being impacted by the Use of Self. This Factor

begins to show what types of self-reported impacts an optimal Use of Self may produce.

Factor 5 speaks to how survey respondents experience their own impact, and how they

Table 11. Factor 5 items: Experiences of Best UoS Impacts

Number	Survey Q	Load	Item
1	Q126	0.743	Others are engaging fully
2	Q127	0.694	Ideas are flowing with little effort
3	Q130	0.669	The passions of those I work with increase to carryout the work
4	Q129	0.657	The impact of my work is occurring in real time
5	Q128	0.623	The whole system is high performing
6	Q119	0.615	My energy is rushing as I and others feel excited
7	Q123	0.614	Generative behaviour and conversations are occurring
8	Q121	0.596	I am in sync with clients
9	Q120	0.593	My use of self feels whole
10	Q125	0.576	Working at the intersection of self, other and situation seems seamless
11	Q124	0.574	My presence can be felt in the room and is impacting in all directions
12	Q122	0.553	All of my resources are sharp and are available to carry out the work
13	Q118	0.506	I and others are in flow and lose sight of time

observe others being impacted when they, the OD Practitioner, engage through their optimal Use of Self. The factor highlights higher levels of engagement in self and others, with those in engagement feeling more in sync, passionate, and committed to carrying out the work. Another aspect of optimal Use of Self is the feeling that one's resources are all available, being used and the 'self' is in flow. In essence, the whole system, including the OD Practitioner, become high-performing, generative in their interactions, using their presence and flow of energy to support the client system to do their work.

3. In Summary to the Quantitative data

Collectively the 5 Factors provide a way to assess one's Use of Self, defining areas that are both relatively strong and areas of less development. An important note about the connectivity among the 5 Factors is that the first four factors support the 'backstage' work of practitioners in ensuring their optimal use of self is in action, which in turn produce what people in the systems and OD Practitioners experience as the factor five outcomes and impacts. Factors 1, 2, 3, and 4 are all operating in action to support the

manifestation of Factor 5, the impact of the best Use of Self.

The figure illustrates the connectivity between how one uses all of one's self resources (awareness, cognitive, emotional and skill-based), manages actions and reactions, clarifies intentions, makes important choices in often chaotic and dynamic situations, all while attending to relationships with others in the system and one's own continuous development. The first three factors are fueled and held together by the ODP's desire to engage in continuous development. The outcome from these 4 factors are shown as impact of the Use of Self on Others in a system.

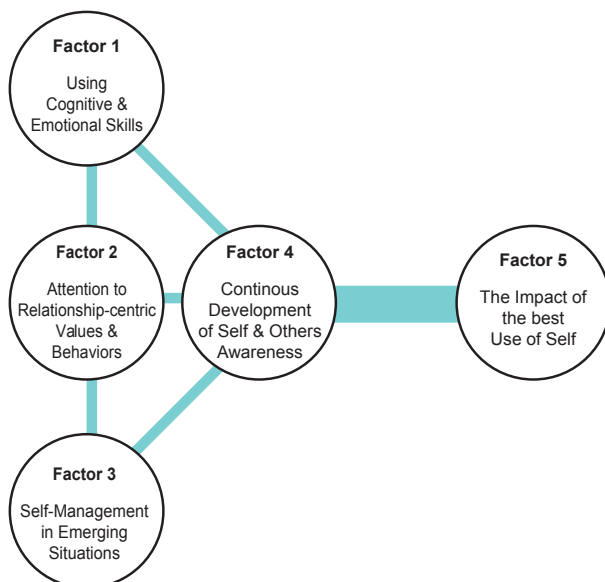
4. Results of Overall Measures

a. Overall Measures

Various measures were used to explore the collective results from our survey respondents: means across the whole sample and means within different sub-group samples. These means describe higher and lower scores across different groupings of our population. Calculating the overall mean required four steps:

- selecting an individual and adding their item scores for all the factors,
- dividing that total number by the number of items used for that person to get an average score,
- adding all the respondents average scores together, and finally
- dividing that total by the number of respondents in the total or sub-group sample to end up with the overall mean. A factor mean is using all the data for

Figure 6: Relationship between the Five Factors



a factor's set of items across either the whole population or any sub-groups selected.

The original survey included 119 scaled items to collect the original data. After the factor analysis only 95 items had strong enough loadings to be included. Now, these scores will give a general measure of how high or low one's Use of Self overall score is and how each factor also scores. This will also allow for mean comparisons across various subgroups (e.g., countries, experience levels, education, race and gender).

After all the calculations, the overall mean score for our sample (704) was 3.85 out of 5.00. This used all the scores from all loaded items for all 5 factors (95) for each person, added together and then divided by the number of items. The final analysis then added all members of the population's individual mean score for the population (704) and divided by the population number. This is a good result, given the large number and the context of our respondent's demographics (years in the field, various countries and educational endeavors, especially). The overall mean scores will fluctuate in different sub-samples (demographics) and will also vary across individual factor means (for the whole population or sub-samples).

For the whole sample, the factor score means were:

- Factor 1 (Using Cognitive and Emotional Skills with Courage to Serve Dynamic Systems) **3.80**
- Factor 2 (Attention to Relationship - Centric Values & Behaviours) **4.07**
- Factor 3 (Self-Management in Emerging Situations) **3.75**

- Factor 4 (Continuous Development of Self & Other Awareness) **3.85**
- Factor 5 (Experiences of Best UoS Impact) **3.68**

Reviewing this data, we believe it is an encouraging sign that the two highest factor score means are connected to relationship-centric values/behaviors and the continuous development of self and others, as those two factors have supported foundational aspects of Organization Development over the years, and Factor 4 has been the key focus on most of the writing on Use of Self.

Within our demographic sub-groups, we are able to determine means for each group. We calculated each sub-group's overall means, meaning all respondents in a sub-group were included with all items across the 5 Factors used in calculating the mean.

Table 12: Overall Means by Gender

Female (430)	3.85
Male (248)	3.85
Others (11)	4.26

The scoring for overall Use of Self was identical for males and females. When sub-sample sizes are very small, the means can be influenced by a few person's answers, which is why means based on small numbers like "others" (11) do not hold the same quality of validity of the first two groups.

The overall country group means range from 3.43 to 4.16. At best, with this large of a sample, the means represents how people scored themselves across cultures. Since our respondents self-reported, there can be no assumptions concerning actual quality or abilities, rather a curiosity around the cultural

Table 13: Overall Means by Country Groups

US (236)	4.01
UK (200)	3.77
Singapore (61)	3.43
China (32)	3.68
South Africa (24)	4.06
India (16)	4.10
Canada (13)	4.16
Netherlands (13)	3.86
Philippines (12)	3.77
Australia (11)	3.97

norms that could be operating within different cultures when answering the survey. Sub-sample sizes with relatively small number of respondents can be influenced by a few person's answers, which is why means based on larger numbers are more valid of a population. Future research can follow up on this issue.

This table shows self-reported race and ethnic groupings range from 3.64 to 4.12... we're pleased that most respondents across all racial group reported relatively high-level means. Further details will be hard to come by because we will need further cross-tabulation and correlation before we can say

Table 14: Overall Means by Racial and Ethnic Groups

White-all types (463)	3.89
Asian/Indian (136)	3.64
Black (various countries) (40)	4.12
Latino (various countries) (13)	3.89
Mixed (15)	3.88

with greater confidence what these overall means actually represent. For example, it is not just race and ethnicity in these groups, but their country of residency, the availability of great OD education and years and experiences that will make the interpretations more useful.

Table 15: Overall Means by Experience Level groups

Less than 10 years (212)	3.62
11-20 years (215)	3.87
21-30 years (154)	3.97
31-40 years (68)	4.04
41-50 years (33)	4.06
51-60 (14)	4.38

Experience Level grouping data shows a rising mean as one's years of experience increase. This logic would suggest that experiences and practice improve one's overall Use of Self across all the measured dimensions.

Table 16: Overall Means by Education Level groups

1 (0-5 points) - (417)	3.80
2 (6-10 points) - (217)	3.92
3 (11-15 points) - (56)	4.06
4 (16-20 & 21-25 points) - (14)	4.10

The data indicates how an increase in education (a formal degree program and/or a continuous development program) results in a higher overall Use of Self score. While time and continuous learning and development experiences will give rise to a strong combination of knowledge, skills, practices and mindset needed in Use of Self ultimately,

we will need to take high quality OD education seriously. There is a real difference between competent and masterful practice, and we believe having continuous high-quality OD education (not one off) will be an important point of growth for practitioners.

b. Factor Scores

Factor scores were calculated for the whole population and each of the sub-groups we created. This calculation helps explore which aspects of Use of Self ran higher and lower throughout our respondents, while also identifying factors contributed most to the overall mean scores. Looking at the separate factor scores provides another way to compare across our various populations. It is important to note that the means calculated are influenced by two facts of our data: size of population sample and the diversity of respondents within that sample. The largest samples with a wide range of item variations will generally settle at a mean that falls close to the mean of the

overall population. In smaller size groups, means that are significantly higher or lower than the overall population are more likely as individuals within those sub-groups can have a stronger influence on results. For example, if a sub-group has multiple people with scores over 4.0, that group's mean will likely be higher. Conversely, if a specific sub-group has lower scores across items, then their collective mean will be lower. Finally, a reminder that the various demographic mixes with different means influences all groups they are in.

Overall, the highest and lowest factors vary across different sub-groups. However, years of experience and levels of education generally trend with higher factor scores for all as their years in the field and educational experiences rise. The 2 factors with the lowest means are self-management and impacts. This could suggest that how one manages one's self in dynamic, unknown, and chaotic situations are some things that are genuinely difficult and challenging, especially if there



Table 17: Factor Scores

Group	Factor 1 Cognitive, Emotional & Courage	Factor 2 Relationship focused	Factor 3 Self- Management	Factor 4 Cont. Develop.	Factor 5 Impacts
Whole Population (704)	3.80	4.07	3.75	3.85	3.68
Countries					
US (236)	4.02	4.18	3.92	4.02	3.80
UK (200)	3.71	3.99	3.63	3.75	3.66
Singapore (61)	3.20	3.84	3.41	3.43	3.18
China (32)	3.47	3.92	3.64	3.85	3.36
S. Africa (24)	4.08	4.18	3.96	4.00	4.03
India (16)	4.08	4.27	3.98	4.02	4.10
Canada (13)	4.22	4.31	4.05	4.10	4.00
Netherlands (13)	3.95	4.00	3.79	3.76	3.68
Philippines (12)	3.51	4.09	3.62	3.89	3.65
Australia (11)	3.86	4.20	3.89	4.06	3.74
Gender					
Female (430)	3.76	4.09	3.71	3.89	3.68
Male (248)	3.86	4.04	3.81	3.80	3.69
Other (11)	4.27	4.30	4.08	4.36	4.18
Race/Culture					
Whites (463)	3.87	4.09	3.78	3.88	3.74
Asian (117)	3.47	3.96	3.57	3.69	3.45
Black (40)	4.13	4.26	4.06	4.17	3.88
Indian (19)	3.92	4.10	3.86	3.97	3.94
Latino (13)	3.73	4.17	3.70	3.99	3.68
Mixed (15)	3.83	4.03	3.72	3.87	3.94
Years of Exp.					
Less than 10 (212)	3.45	3.94	3.52	3.67	3.40
11-20 (215)	3.83	4.08	3.75	3.85	3.74
21-30 (154)	3.97	4.12	3.85	3.99	3.78
31-40 (68)	4.07	4.17	3.93	3.97	3.98
41-50 (33)	4.17	4.17	4.02	3.96	3.89
51-60 (14)	4.37	4.45	4.36	4.43	4.22
Education Levels					
Code 1 (0-5 pts) (417)	3.76	4.04	3.71	3.79	3.62
Code 2 (6-10 pts) (217)	3.89	4.12	3.82	3.94	3.76
Code 3 (11-15 pts) (56)	4.02	4.19	3.91	4.09	3.95
Code 4 (16 and above pts) (14)	4.12	4.05	3.69	4.14	4.15

are other “things” that are happening in our personal life. But nonetheless they do make a difference in how well people are showing up with their ‘best self,’ to create a positive impact.

5. The Summary

Each of the factors contain various aspects and elements, originally found in the extensive literature review, that describe and define the Use of Self concept and practice. The summaries above are statistically created based on the pattern of item-answers across all respondents. Thus, a range of different elements make up each factor.

Another helpful note is observing how the first four factors collectively produce what is detailed in factor 5. For example, it’s unlikely to see the high impacts of factor 5 if all the

other 4 factors are not high themselves.

Factor 4 on continuous development is the main ‘back-stage’ factor highlighting how we continue our forms of self-care, learning and development. Without this factor we get burnt out and lose focus, energy, sharpness, and in-the-moment adaptability.

These 5 significant factors describe what are the factors that marked the characteristics, behaviors and practices of those who are using their best self with the fifth factor showing the impacts practitioners experienced and described for those they serve.

This type of data will be useful for individuals in future versions of this survey as a scoring template. Also, if the instrument is set up as a self-assessment tool, an individual could get a personal score with more specific meaning for them.





V



Qualitative Data

There are 7 open questions, the first one (Q7) asked respondents to give us their definition of Use of Self and how they described it. The rest of the 6 open questions will be dealt with after this one.

1. Use of Self Descriptions and Definitions

Question 7A: When I think of Use of Self, I describe it as or define it as?

With this broad open-ended question, we received many types of answers. However, viewed together, there is a strong composite of how respondents view what Use of Self is and how it operates. Some respondents talked about

themselves more and answered with key characteristics or skills they have and use. These skills include listening, non-judging, avoiding conflict, integrity, attention to non-verbal behaviors, giving people space, intentionally bold and proactive, developing trust, push with gentleness, driven, open-minded, desire to help, be honest, create safety, pragmatic, unconfident, analytic skills, compassionate, and curious. Other respondents provided examples of something they did such as their work with clients and actions representing good OD consulting. Some provided their understanding of how awareness was essential in Use of Self, how they needed to bring their whole selves to their work, and how they worked in the moment to manage themselves and make choices in service of the client's change work. Still others mentioned their impacts on clients and the impacts that occurred on them. Many discussed various ways they learned and pursued continuous self-development. Finally, some respondent's answers had no clear connections to Use of Self.

From all this data, 6 main themes emerged - described in different ways, but all dealing with common phenomena.



Table 18: Respondents Description of What is Use of Self? 6 key Themes

Describing/Defining Use of Self

Whole self – existential self, internal sensation, value and passion in operation... etc: most respondents made the point to bring in their whole selves, describing that in an inclusive way:

- Holistic self, conscious and unconscious, experiences, body, emotional, spiritual, intuitive, knowledge, language & tone
- Internal workings: triggers, biases, insecurities, preferences, identity es, fears, judgements, perceptual, intentions, passions, values, ethics, humility, responses, filters, voice(s) in my head, assumptions, hunches, contradictions, shortcomings, boundaries, level of confidence, self-esteem, cognitive, reflective use of models, strengths, words
- Behavioral choices: skills, point of view, theories of practice, assumptions, personality, philosophies, attitude, mood, motivations, how who I am affects what I understand
- Some highlighted their own unique or authentic self or their own essence as their definition of Use of Self

Work in the moment: Multiple respondents highlighted how Use of Self work is often in the moment, the here and now. The many descriptions are summarized below:

- Simultaneously and mindfully thinking, feeling and doing
- Adapting behavior from what sensing/interpreting
- Checking in with self data, how they are reacting and feeling
- Continuous internal meaning-making
- Using multiple sense-making intelligences
- Identifying awareness of self, other and context in the moment
- Having awareness in the moment to inform choices
- Having the courage to bring what doesn't naturally exist to the organization
- Being deliberate and intentional
- Balancing my purpose with the client's
- Next step beyond self-awareness and authenticity
- What is happening in me and around me influences what I should do
- Responding to real-time stimuli in current situation
- Deploying best self moment to moment

Presence: Presence was mentioned numerous times and in many different ways. It was usually connected with working in the moment and being present with the client, system and situation. Presence was also seen as part of the Use of Self instrument:

- Presence as instrument in the moment
- Presence to provide what doesn't exist, facilitate change or influence
- Presence as an instrument of interaction
- Presence as instrument of change
- Presence as staying present with feelings and perceptions
- Deciding how much self-disclosure is useful in each situation
- Interpreting in flow to make choices
- Noticing my inner state-how I impact others, sense and interpret what's going on, how situation & people are impacting me
- Inner state & external state connection-aligning intentions with behaviors
- Congruence of who I am with what I'm doing
- Way I show up, questions I ask, conversation I start, how I engage in relationships
- Be still enough to be able to see another
- 'Truths' are being socially-constructed in the moment

My Awareness (Self-understanding): One's self-awareness was seen as a critical base from which to use yourself:

- Self, other, context system, thoughts, feelings, sensations, awareness of impacts (mine on others and the others & situation on me), all aspects of my whole self
- What I protect/defend (my weaknesses or fears)
- In prepping for intention
- What is mine, others, ours in interaction
- Multiple selves (personas) and identities
- My relationship to/with myself
- How I understand self as system
- Developing comfort in own skin to bring more of self into your practice
- Accessing and enhancing field of awareness

- Works to help understand situation, summon my capabilities, make choices and model different ways of being
- See parallel processes between self system and client system
- What you see and what you miss
- When aware of self able to make conscious and intentional choices without illusion
- Deep understanding of the roots and drivers of my character

Manage self in dynamic situations: Many respondents discussed self-management in the moment, in preparation and in response to disrupting events by:

- Trusting in the self
- Attending to/balancing self, the client, our interaction & project goals
- Being grounded, centered and attentive
- Holding tensions within self and within client space
- Balancing gifts with insecurities, fears and personal needs
- Regulating feelings, reactions and responses
- Modulating behaviors, adapt and flex
- Aligning intentions with behaviors, actualizing intent
- Using personal power
- Interrupting auto pilot and habitual behavior
- Shifting internal states and behaviors to change what is happening around me
- Paying attention to the multiple levels of the system for broader understanding
- Needing to integrate what's in me and what is coming from others and the situation

Learning and Continuous Development: Multiple respondents described Use of Self as doing development work regularly while using each situation/experience to learn from or use reflective practices to extract new understandings by:

- Learning through self - what is happening inside, my internal sensation
- Learning through interactions in relationship
- Learning through mutual impacts
- Learning from self in action

- Learning through regular reflection before during and after; reflective after action and growing into reflecting during action
- Engaging in continuous development to prepare self for this work, be ready and sharp
- Conducting accurate self-evaluations
- Developing self first to be able to take others further

In service of client, others, greater good: Most respondents added a purpose in their answers and felt Use of Self was in service to others by:

- Courageously sharing and taking actions
- Managing energy, space and safety for client system
- Developing and working through relationships in client system
- Working in co-creating alliance with client
- Unlocking potential in client system
- All for the progress and achievements of the client system

For added understanding and context for our summaries, we've selected a sample of how various people described Use of Self in their own words. We selected some to include here and others can be found in Appendix E.

"I think of it as a 10-dimensional *parallel Universe type of concept* where I view myself and others in many ways. It is about how I *self-assess my current skills and capabilities* and take initiatives to keep *improving my skills and abilities based on my strengths and weaknesses*. This will automatically have an *impact on others* in the organization."

"Working with my *awareness of my moment to moment experience inside me and outside me*, to ensure that my *cycling of sensemaking and action is as informed, choiceful and impactful as possible in service of my clients and their systems*. This includes the ongoing active inquiry into my own history, perceptual filters, embodied patterns and more; alongside

the development of skills to catch the effect of these in each moment and *skills to then act effectively in each moment*. As well as that *in-the-moment reflexive capacity*, it also includes my reflective capacity to process events after the fact, to learn from experience for further action in that client system and others subsequently."

"I see and experience my whole self as a *dynamic process* that has the ability to access a *field of awareness*. There is a paradox at the heart of this self-perception in that I see *my deeper source as a consistent point of reference, a place of inner stillness* whilst my *external self-forms and dissolves depending on the context* which is made up of multiple variables."

"Leveraging my *skills, interests, abilities, values, personality, behaviors, habits, and actions to guide and support the organization to reach its strategy and development goals/*

objectives/health and effectiveness. If I'm present and intentional, my use of self will likely be more effective than if I'm distracted, un-rested, under-nourished, and stressed, not seeing the full impact of my low awareness and self-management on the system."

"Self as an instrument of change. Love the notion that the most powerful instrument we have in helping our clients navigate is ourselves. The ability to use ourselves relies on the level of awareness we have about the impact we make and our ability to make choices to influence or modify that impact."

"the ways in which I consciously and unconsciously impact on client interactions. I am aware that this impact is a factor of my whole person - physical, social, emotional, intellectual and spiritual. As an organisational development practitioner, I am my primary instrument. I am the most complex tool in my kit and my greatest professional responsibility is to ensure that I am constantly developing myself to enable me to become increasingly effective. This development includes constantly clarifying my purpose and intentions, developing my awareness, growing in character and maturity, increasing skills and knowledge, expanding my access to resources and supportive communities, understanding and playing to my strength, enhancing and expanding my processes and deepening my ability to manage my vulnerabilities, lead myself and others."

"My Use of Self is a synthesis of my being (who I am: values, beliefs. social group identities) and what I do thru my actions."

"Bringing 'all of me' into my work; using my own physical, emotional and cognitive responses; being in tune with what is happening for me moment by moment as I do my work; having an awareness of how my 'being' is impacting what I 'do' in my work; working with the energy

and space that is created between me and my client or client group."

"How I 'show up' in a client interaction and how I am interacting with me, in terms of my inner world and how that influences the client interaction. This includes what I notice and sense, what I invite, how I deploy my energy - all in pursuit of creating a set of conditions to enable increased insight, choice and possibility"

"Who I am when I am holding space for another person or group of people so they can identify and accomplish goals that they have identified. UoS is the totality of one's behavior--verbal and non-verbal communication, knowledge, skills, attitudes, beliefs, humor, and more--that are applied in the course of facilitating individual and group processes."

"For me self is about who I am, a combination of my past and my aspirations for the future, I bring these feelings/concepts when I come to work, I attempt to be aware of them to support me in finding ways of articulating what I am observing or feeling in the system, so that I can make sense and find ways forward"

"Standing beyond the situation at hand, noticing what I sense (see, hear, feel) and how my own moods or biases may be affecting what I notice, making a conscious choice about how I put myself into the situation, how I am and what I do, and reflecting on the impact this is having."

"Being aware and intentional about the affect my words and behaviors have on others, using them to help others to think and communicate differently, to see their situation from new perspectives, and to unlock their own knowledge and wisdom."

"The 'self' we are, the person we are is the

most potent and versatile tool we have and using ourselves well is critical to the quality of the interventions we make. When we pay attention to both our thinking self and our feeling self we increase our capacity to sense what is unfolding moment to moment. We begin to notice our own emotional responses and are able to interrupt automatic patterns so we can intervene skillfully. By tuning into our present moment awareness, we can not only observe how we are showing up but also notice the patterns that are being co-created inside of the interactions, including what might be unspoken and yet present in the social space.”

“Being intentional in the type of impact I plan to create when working in the client system. It also includes being aware of my gifts/talents, my shadows and the conditions which will bring out the best/worst in me, and either enhancing those conditions (to bring about best version) in service of the work or mitigating them to soften/manage the poorer versions of self”

“Knowing myself (as a system), knowing the client system, being mindful the connection

and interaction between these two during the engagement, take each and every single action to be strategic in a constructive way, by complementing and influencing the client system with all the different and positive attributes of myself.”

“My ability to bring my authentic self into the work I am doing - through my personality and preferences, my beliefs, my skills, my emotions, my sensations, my anxieties, my relationship dynamics, and so on, with awareness of my impact on the work I am doing, and the impact of the work and the systems I am working into, on me.”

In conclusion, we can safely deduce most respondents demonstrate a clear conceptual understanding about the Use of Self concepts and the components that enable the practitioner to stay optimal in using one’s self for the client. The question, however, remains if the ability to articulate the concept with such sophistication automatically translates into the mature manifestation of using one’s self. It is the analysis of the next 6 questions that will help us answer this question.



1. The Six Questions

Having explored the definitions of Use of self shared by respondents we want to explore the rest of the six qualitative questions. These six qualitative questions generated 8,232 data items, resulting in some of the most interesting data on the Use of Self which has ever been captured.

The six questions are:

Q 132	What impacts do you personally feel your best use of self creates for others?
Q 133	What barriers (from yourself) are most common in hindering your best use of self?
Q 134	What barriers (from others or the situation) are most common in hindering your best use of self?
Q 135	What top priorities you have in developing the effectiveness in your Use of self? and what type of development activities you deem as appropriate to support you in doing so?
Q 136	What are some of the more regular activities you do to improve your use of self?
Q 137	What self-care habits have you developed that help you to maintain your energy, focus and sharpness?

2. The Data Analysis Process

The analysis of the qualitative data was a labor-intensive process with three people extensively exploring the data. All questions, except Q 137, were double-reviewed, ensuring that the data results presented in this report were compared and collated prior to being reported. Appendix D contains details of the methods used in this process.

3. Presentation of the Qualitative Data

In the following section, we report the collated answers from the 6 questions in four sections. We did this to help the large amount of data be more accessible to the readers. The four sections outlined are:

- Internal and external barriers to the best Use of Self (Q133/134)
- Top priorities in development and the type of developmental activities to support the best use of self (Q135/136)
- Self-care habits to maintain energy, focus, and sharpness (Q137)
- Impacts the best Use of Self creates for others? (Q132)

Note on the numbers:

The survey sample size is 704 respondents, but the number of response statements for each of the questions often exceed the number of participants, ranging from 800 to 2,400 statements. This is because many respondents gave more than one answer to the same question or gave an answer that has different qualitative points. In that case, we separated the different points, and counted each point as a different item. For example, in response to the question of top priorities in development, one respondent wrote “I need to get better in OD theory, I need to work with my therapist about my tendency to cave into invisibility due to fear, I have poor control when the clients are acting out...” This one person’s answer would be counted as three distinct data items.

In the following section, for each question, the number of data items of the major themes will be shown in a rank order. This helps

readers to know which themes show greater and lesser weight according to the volume of responses. To make the data even more accessible, we further divided some clusters into distinct sub-themes. At the end of each cluster we offered our observations of what the data revealed to us.

Cluster One: Internal and external barriers to the best use of self.

What barriers (from yourself) do you think are most common in hindering your best use of self (Q133)? 7 themes were extracted from the data.

Table 19: Internal Barriers that Stop me from being the Best of Self

Major Themes	Counts
1. Data items counted as “Lack of self-confidence, self-doubt, and fear” <ul style="list-style-type: none"> • Lack of confidence and self-doubt, as related to my history (91) • Being judgmental of my own ability and having critical inner voice (81) • Fear of...(97) (especially worry about others’ reaction to me) 	269
2. Data items counted as “Personality and style” <ul style="list-style-type: none"> • Extraversion/introversion (12) • Too strong or too quiet style (14) • Bold/or not bold enough (20) • Too fast and become impatient (33) • Too much or too little empathy (10) • Operate more in the head than heart (12) • Perfectionist (3) • Risk averse and conflict avoidance (19) • Task focus and less tolerant of ambiguity (11) • Want to please, to be accepted, to be approved and loved, high need for safety (17) 	151
3. Data items counted as “My “SELF” in the way” <ul style="list-style-type: none"> • Self-focus-egotistical (28) • Judgmental, bias and assumptions (40) • My patterns (14) • Lack of self-awareness (10) • Emotionality – my emotion gets in the way (38) 	130

<p>4. Data items counted as “Overcommitment and lack of self-care; lack of time for reflection and development”</p> <ul style="list-style-type: none"> • Over-commitment (34) • Lack of self-care (25) • Physical fatigue and low energy (24) • Lack of time for reflection and development (31) 	114
<p>5. Data items counted as “Practice issues that stop my use of self being effective” There are diverse sets of items under this theme which make it hard to group. Hence the following is just a sample list of what show up in this questions:</p> <ul style="list-style-type: none"> • Lack of time in planning and do the right preparation; • Lack of flexibility in running the processes; • Joint working stumbles me; • My own filters which sometimes make me stuck in some facilitation situation; lack of intentionality and purpose; • Being too practical vs creative; • Rigid vs working with emergence; • My passion sometimes stand in the way of my practice as I wanted too much for the process to go in a particular direction; • I am easily to be distracted and hence unable to stay in the here and now; when I work with people who are incompatible in value 	106
<p>6. Data items counted as “External situation that bring out the worst in me”</p> <ul style="list-style-type: none"> • cross cultural, racism, oppression situation (15) • others – like leadership distance, work politics, people do not show up as adult; no connection; no access to relevant people, bureaucratic boundaries; limited resources; lack of time from clients (29) 	44
<p>7. Data items related to internal consultants – e.g. proximity to the client, being integrated into the system after 13 years; trigger point of shame, sense of rejection, lack of recognition, challenging context, on the go, the incoherence between my sense of the role and the systemic expectations, find taking risk very difficult, there are political risk in speaking up...etc.</p>	20
<p>8. Unassigned items</p>	29
<p>Total Data Items from Q133</p>	863

Our Observation about Question 133 in Table 19:

Out of 863 data items, only 44 “External Situation” items (5.1%) were attributed by the respondents for causing barriers to their effective Use of Self. While 64% (top 3 themes) are sourced from within. Combing through the list of internal barriers, the respondents show immense awareness to the type of internal factors that play a role in derailing their own Use of Self. Their honesty in naming the barriers to their Use of Self was very moving – sometimes as if we could hear their pain, shame, and frustrations with themselves.

Out of the top ranked theme of “Lack of self-confidence, self-doubt, and fear” (269 items), 77 out of the 97 items start with the two words “fear of...,” such as:

fear of being judged by others, fear of not being good enough, fear of my own anxiety or insecurities, fear to try, fear of rejection, fear of facing my own internal fears, fear of not being of use, fear of failure, fear of being too vulnerable, fear of strong emotions, fear of offending....etc.

Another 172 (91+81) items are about lack of confidence, having self-doubt, and dealing with one’s own judgmental and critical self in reference to ability. For example,

Lack of confidence in my education and abilities, lack of confidence to call out what I observe, fundamentally wondering “how did I get here?,” I still have to deal with my sense of inadequacy, and have to “big myself up”, suffering from imposter syndrome which is my big problem, asking myself “are you even credible?,” having negative self-talk is my big problem

In the second-ranked theme of “Personality

and style” (151 items), a number of data items highlight that a multitude of respondents appear to be not comfortable living in their own skin. They live with critical voice about who they are, and experience their personality as a barrier to their best Use of Self. A sample of them are:

I am either too extrovert or too introvert, either way I am not doing well, I take too much risk, or I do not take risk at all, I am too bold or not bold enough, too fast, or not moving fast enough, as a perfectionist, I am getting impatience....etc.

The third-ranked theme of “my SELF in the way” (130 items), summarizes the respondents’ sharing of their default ‘inner habits’, ‘mental models’, and ‘perception of who they are’ that stop them from being effective. Many respondents described themselves as too emotional, too judgmental, too bias and making too many assumptions, and too self-focused and egotistical...etc. In this cluster, we feel their vulnerability. For example:

I can be egotistical; my ego, pride and own arrogance can get in the way; I am “I centric” vs client centric; I tend to forget that doing this work is not about myself and my ego gets in the way; my ego take priority over my partnership spirit; serving my own ego and increasing my sense of worth are the two areas I have to watch out for most; I need control, I am not very good with others’ weakness; compassion is not my strong suit; I tend to act on my desire to build credibility/demonstrate add value; I am judgmental, I am too quick to judge others; I do not do well when my unconscious bias, physical tiredness, low chemistry, my judgement all come out; I have a difficult time to remind neutral....

When adding these top three ranking themes together (550 items, or 64% of the

total data items), we got the feeling that, while respondents show impressive self-awareness of who they are as well as being eloquent in describing what is the Use of Self, but they are also aware that there is a lot of “self” work still need to be done.

Our reflections:

(1) if respondents only show self-awareness without actively engaging in life-long work in progressing these issues or exercising appropriate self-management in the here and now moment, then OD will lose its edge and brand.

(2) If one’s “self” is not in flow, what may be the compounded impact on their Use of Self?

(3) Further, the data reveals there are other areas that would require further attention and investment, beyond self-awareness, to identify, own, work with and navigate the barriers to one’s best Use of Self. For example, the following three themes outline the areas

- Theme 4 detailing the need to stop

being overcommitted, take better care of one’s self, and engage in more reflection.

- Theme 5 highlights the need for practice and improvement.
- Theme 6 details the need to find ways to navigate the external situations that often bring out the worst of oneself.

The respondents recognize that the compounded effect of the listed areas could really get into the way of their effective Use of Self. This challenging situation is particularly real for internal consultants (Theme 7) whose proximity to the client, history of good work or failure, and relationship patterns in the organization often put them in a position that there are a powerful witness to how they manage or not manage themselves. As not dealing with their own internal barriers will be not just felt by themselves, but by others through the lack of impact.

The two closing questions for this section are: what type of developmental activities do the respondents need to help them

Table 20: External Barriers that Stop me from Being my Best Self.

Major Themes	Counts
1. Data items counted as relating to “self” that are barriers to Use of Self	
a. Lack of confidence issues (24)	
b. Default behavior from myself that stands in the way (20)	
c. Situations that would bring out the worst side of me (130)	
d. Triggers (26)	
e. Fear/anxiety and feeling intimidated issues (13)	
f. Lack of self-care (11)	
g. Practice errors (14)	
	238

<p>2. Data items counted as “others” – people (clients, colleagues, partners) attributes and behavior that are barriers to one’s own Use of Self.</p> <ul style="list-style-type: none"> a. Lack of openness (28) b. Lack of willingness to engage (not willing to invest time) (48) c. Lack of competence/knowledge and unwilling to learn (21) d. Lack of willingness to explore alternatives, having “fixed mindset” and stay rigid (24) e. Want a quick fix, quick solution all in a speedy time (16) f. Resistance to change, cynical and not ready (19) g. Clients who have negative, challenging and aggressive behavior (23) h. Clients who are too emotional, have too high anxiety and fear (20) i. Unwilling to relate (8) j. Misalignment of role expectation (9) k. Others: e.g. talk too much, not ready, hidden agenda, arrogant, high control, domineering, conflicting value, who has psychological disorders, judgmental, don’t want to work (too lazy), deceitful, lie, not honest, not working in a generative way.....etc. (21) 	237
<p>3. Data items counted the “environment” (the context in which they work) produce barriers to their best Use of Self.</p> <ul style="list-style-type: none"> a. Leadership Issue (36) b. Cultural issue (46) c. Lack of resources and time in the context (36) d. Inequality and Justice issues (25) e. The dominance of power and politics issues (45) f. Other situations (8) 	196
<p>4. Data items counted as “misalignment of focus and expectations between practitioners and organizations”</p>	57
<p>5. Data items counted as the “challenges about being an internal practitioner”</p>	44
<p>6. 30 statements on “my best Use of Self should not have been affected by external barriers”</p>	30
<p>7. Unassigned items</p>	9
<p>Total data items from Question 134</p>	811

work on the 64% of data items identified as internal barriers to them achieving better instrumentality. And, what is the role and responsibility of OD Practitioner developers, Development and Educational Institutions, in terms of their programme and curriculum offerings, to supporting these developmental activities?

What external barriers (situational from others and the context) do you think are most common in hindering your best Use of Self (Q134)? Six themes were extracted from the data for this question.

Our Observation about about Q134 in Table 20

Six key themes were extracted from the answers to Q134. The highest ranked theme on “external barriers” is listed as “factors related to self”, which is both surprising (because the question is asking respondents to name external factors outside of self) yet congruent with the answers from Q133. The main mechanism operating here, as experienced by the respondents, is that it is their SELF who interact with OTHERS within a context. The SELF inevitably develops internal sensations towards those whom they engage with. Yet, depending on the ability of the respondent to manage their internal sensation, they may either express themselves indiscriminately, or exercise self-management to maintain their professional public persona. In both cases, they report there is a “shut down” process occurring regardless.

Let’s look at two items in Table 20, the SELF section 1.C (situations that would bring out the worst side of me) and 1.D (triggers that will set me off) in which the respondents reported the different types of “situations that would bring out the worst side of me”, or external factors that often “trigger” reaction, mostly negative. For example:

When there are very strong and dominant personalities that will not listen to me; arrogance expressed by others; others not open to collaboration, politicking, judgementalism from others, rigid processes, no flexibility, system not recognize my effort, authoritarian steering behavior, lack of understanding of what OD is; excluding behavior, hostile/ aggressive and angry behavior; direct exclusion from the system and yet asking me to perform within a silo and with a “program” mentality; disbelief, lack of trust, labelling, name call, bully behavior and their inability to see “isms” and deep privilege; power play, hidden agendas, and dragging me in and I regularly get hooked by other dynamics in the system; when I am triggered by a particular type of individual or context, I retreat and lose my clarity of purpose, I become smaller; I know I can get triggered by men who I feel are dismissing or demeaning my contributions; It is most likely for me to get triggered by certain types of people, e.g. Myers Briggs ENTJ, I would say that this relates to an internal barrier (a shadow that I have not worked through yet); when I find bad behavior in others has a very demoralizing impact on me, I become judgmental and lose objectivity; people I do not like are clever people with a vast vocabularies; Trigger by world view that are not compatible with me, and my lack of care in attending to them;

Many of the 130 data items from Section 1.C (situation that would bring out the worst side of me) can conceptually also be put under the second theme of “others” or the third theme of “environment” because they are “situational factors” that cause respondents to compromise their Use of Self. However, we intentionally chose to put these items under “self” because of the recognition that the respondents know that there are some

things they can do to stop themselves from being disengaged from the work and become less vigilant in using themselves (e.g. stay invisible, disappear to the back ground, become impatient, grumpy and lost their focus).

Next, there is a long list of items respondents identified as what “others” do that they tend to react to that compromise their own use of self. For example, they react to people who:

Are mechanistic in thinking, lack of authentic engagement, who are arrogant; persist with preconceived outcome; who are negative, domineering, disrespectful to others, aggressive, intolerant of diversity and differences, shut down others; egotistical, defensive, blaming others, who lie, not being honest, lack of courage, clients who are highly anxious and fearful, linear in their thinking, skeptical, who talk too much, clients who want to DO instead of FEEL, aggressive, people who do not work with value; closed mindset, inflexible...

The narrative of the power of “others” who can derail the respondents from being in their best self continues as the impact of those external factors that fall into the next theme “the type of environment” the respondents function in. The environmental issues they listed that can derail them are also very comprehensive. For example:

Leaders who shut down the conversation, judgmental leaders, toxic authoritarian structure and culture, excessive hierarchy, lack of alignment among leaders, fearful culture, bureaucratic approach in decision making, power holders stops different thoughts to surface, cognitive thinking bias, risk averse, a “mean” culture, institutional fatigue, a “MEAN” environment, lack of regards to safety; restricted resources, lack of knowledge of the resources needed

and available, time pressure all the time, not given enough time to do the work, “let’s get it done” mindset, no time to regenerate, to be intentional, losing sights of the customers, staffs; unwilling to address the inequitable diversity dynamics, no concern over racism and sexism, and any other isms, prevalent prejudices; entitlement with master-slaves dynamics are big in my work place; politics shape the perception of the real agenda excessive office politics.

Two Observations emerged from looking at Q 134. Firstly, there are lots of external factors that can impede the Use of Self, especially when the environment becomes greatly complex and people become more anxious and stressful. Our second observation is that the findings actually fit well into the literature search framework, which is the self never operates alone. Day by day, we interact with many “others within a specific environment which can either foster conditions for success or derail their ability to function effectively. This Gestalt framework: Self, others, and environment will be explained in the next section of the report.

The total data items when we add in Table 20, Theme 3 (environmental factors) and Theme 4 (misalignment between self and organization) together is 253 statements which makes an interesting proportion of 30% split between each of the three: self, others, and environment that constitute external barriers to Use of Self (out of 811 total data items) The data items remind us that Use of Self is really the phenomena of “self in action” within a relational arena with others, multiple others, all within a given FIELD. Every day the practitioner is in constant interaction with others within the organization’s whole system field and/or many sub-fields in which she or he is expected to create impact to the system. The quality of such interaction will create different internal sensations within the practitioners. It is the way the practitioners choose to handle themselves in light of all the

challenging people and environmental factors that will determine whether they can remain effective in executing their role.

Finally, it is important to report that out of 811 statements, there were 30 powerful statements from respondents which helped to shed light about another mental model some practitioners have towards the essence of their Use of Self. These statements highlight these practitioners willing to challenge the external forces and currents that aimed to diminish their effectiveness, to go against them and to continuously adapting oneself to stay effective -- all the while holding on to one's core identity while doing this work. Below are few of these statements:

- *My effective use of self should not be determined by external factors;*
- *I am reluctant to place accountability for my inability to bring my best self on factors outside of me;*
- *this question just does not make sense to me;*
- *I think barriers come only from me, but certainly it is easier to use my "self" best when I feel accepted, trusted and like;*
- *I must take responsibility for my own use of self;*
- *this is a tough question to answer, while there are barriers, but they are experienced internally, through my own cognitive and emotional processes. As such, they are, in reality, aspects of my "self- hindering myself";*
- *I think barriers are internal, not external; it is important to know the best use of self is down to me...*

The 30 statements pointed out the importance of an OD Practitioner mastering the art of self-management, which is Factor 3 in the quantitative data. Having said that, we acknowledge there is real challenging aspects of doing OD work, which many of us, after all these years of practice are still working through this tough terrain of working with difficult people and complex organisations.

Cluster Two: The priorities, regular developmental activities that support my best Use of Self (Q135/136)

Q 135: What are the top priorities you have in developing the effectiveness in your Use of self? And, what type of development activities may be appropriate to support you in doing so? There are two parts to this question, and we focus first on eight priorities were extracted from the data.



Table 21: Part I: Top Priorities to develop my effectiveness in my Use of Self

Major Themes	Counts
1. Deepening my self-awareness (understanding of self, values and vision work)	156
2. Deepening my understanding of self, others, relating in specific context (working on unconscious bias, increase understanding of diversity, being humbler and learning to build trust and relationship)	103
3. Developing better self-management – more patience, match pace to others, less judgmental	95
4. Improving self-care (work life balance, not too many projects, more re-energizing activities, have more self-compassion and self-forgiveness)	68
5. Needing to work on my unresolved issues	57
6. Needing to increase my confidence, greater courage in intervening, greater sense of groundedness	40
7. Doing more to improve physical and emotional wellbeing (yoga, Alexander technique, music and dance, physical exercise)	35
8. Getting to know the context I work in	23
Total Data Items from Q 135 and Q 136	577

Our Observation from Table 21: Part I of Q135 and Q136 – top priorities of development

The answers from Part I (top priorities) have a high congruence with the type of barriers respondents listed in their answers to Questions 133 and 134. We believe that the eight top priorities, identified by the respondents above, if consistently pursued in a life-long learning attitude, will help OD Practitioners manage and reduce their internal and external barriers.

To signpost what are the priorities of development that OD Practitioners may

consider, we clustered the 8 themes (sections) from Table 21 into 4 priorities:

- a. Getting to know our “self” more, continue to increase our self-awareness, working on unresolved issues, increasing self-confidence. (Section/Themes (1) (5))
- b. Learning how to be more tolerant with diverse “others” whom the OD Practitioner will inevitably work with, being relationship centric and more affiliative (Section/ Themes (2) (8))
- c. Developing an effective self-management practice to manage “self” and function

effectively regardless of how challenging the work environment by growing in knowing and accepting the context and people within it better. (Section/Themes (3))

psychological wellbeing. (Section/Themes (4) (7))

How does one go about doing the above? Table 22 Part II of Q135 and Q136 provides some answers for us.

d. Better self-care – ensuring physical and

Table 22: Part II of Q135: What type of development activities may be appropriate to support you in doing so? 8 themes are extracted.

Major Themes	Counts
1. Engaging in reflective practice (journaling, reflective practice, reflection before and after intervention...)	170
2. Receiving coaching, supervision and peer support (group supervision, mentoring, peer support and exchange)	123
3. Seeking feedback (from clients, colleagues)	110
4. Finding opportunities to have more practice and more experimentation to increase confidence in my practice	108
5. Continuous learning to develop myself (reading, develop better skills, up to date with latest research...)	102
6. Spiritual Practice (go on retreat, more meditation, mindfulness reflection and journaling, and other spiritual practice)	101
7. Attending more formal developmental program and workshops (getting Master and PhD, and other workshops that will sharpen my practices)	66
8. Attending conferences and other networks that support me (learn theories and tools, and specific technique)	65
9. Unassigned items	57
Total data items for Question 135	902

Table 23: Q 136 What are some of the more regular activities you do to improve your Use of Self? (14 themes are extracted)

Major Themes	Counts
<p>1. Reflective Activities: this theme refers to items like carrying out self-reflection, journaling, regular reflection, having quiet time to get clarity on emotions and thoughts, undertaking double-loop learning perspectives, increase self-awareness, doing integrative work, regular meditation, going inward to consider how I can change my behavior</p>	326
<p>2. Debriefing/Feedback/Reflection with others: this theme refer to items like debriefing with clients and co-workers, designers, drawing learnings from experiences, embedding reflective practices into our process when working with colleagues, practicing giving and receiving feedback, seeking insightful people for debrief and asking for feedback for improvement</p>	230
<p>3. Attending workshops, developmental events, conferences to engage in continuous learning: this theme refers to items like seeking relevant conferences and workshops to attend, picking out specific events that will stretch one, investing in learning something new and interesting; attending a variety of professional events from different domains; continuing to participate in learning events organized e.g. ODN, IAF and others, and finding opportunities as soon as possible to apply the learning</p>	222
<p>4. Continuous learning: Reading, observing, self-learning: this theme refers to items like learning through podcasts and Ted talks, watching TED talks or other videos to understand topics and their interconnectedness, reading OD theory, reading anything that is outside of the OD box and gives stimulation to thinking; practicing observing skills; taking classes that help focus on intentionality; wherever insatiable curiosity takes one; reading books around human consciousness and interactions; reading and learning from many countries and cultures.</p>	212
<p>5. Spiritual Practice/Mindfulness/Meditation: this theme refers to items like spiritual practice e.g. prayer and worship as well as references to meditation and mindfulness. The words meditate and meditation came up in 103 times. Other frequent words used include mindfulness, retreat, and spiritual. Going to a silent retreat, love the space and the stillness of no activities to be deeper in my reflection, developing a spiritual practice, making space regularly to reflect, pray, read the Bible and other spiritual texts and be skill, contemplative practices, seeking spiritual direction, regular attendance at religious organizations</p>	182
<p>6. Action Learning/coaching/supervision: this theme refers to items like going to action learning, communities of practice, coaching, supervision i.e. any formalized pair or group learning processes addressing Use of Self. For example, regular 1-1 coaching with a skillful coach, participating in peer learning through communities of practice, “I am a part of support and challenge group and a supervision group, similar to an learning set where I will use my air time to raise issues I want to work on, identify what hooks me and my resistance”; I am member of four different practice development groups, each meeting approximately quarterly, mostly reflective, one on case studies, the other on practice review, another uses written reflection on pre-agreed themes, and the fourth one on personal development</p>	145

<p>7. Self-care (physical, emotional, and general wellbeing): this theme refers to items like physical exercise and other ways of looking after the body including nutrition and sleep. For example, practice Alexander technique, yoga, managing rest and energy levels more carefully, getting regular massages, swimming, biking, walking, fasting, strength-based training, healthy eating, getting enough sleep and exercising.</p>	123
<p>8. Doing re-energizing/nourishing things to re-charge: this theme refers to items like socializing, art in many forms and contact with nature, music (listening/playing/singing), dancing, clowning, visiting art and cultural institutions, being with kind people, getting to meet new people who are very different from me</p>	74
<p>9. Practicing Intentionality: (Note: most of the statements could be easily seen as development activities. But the distinctiveness of this theme is the intention of the respondents – through whatever activities – they want to work on being more thoughtful and act intentionally to get support and help them to better manage and work with their default reaction to people and event.) For example, about cultivate meaningful friendships of “iron-sharpening or iron-king” quality, distancing from people that drain them, “being in fellowship with those men who are primarily interested in the technology/mechanics of the club airplanes and fly.” They want to be more intentional about their behavior.</p>	65
<p>10. Extending scope/challenging self to take: this theme refers to items like the conscious and deliberate decisions made by the respondents to put themselves into difficult or challenging situations as a way of developing their Use of Self. For example, working in areas that make one fearful, putting oneself outside of my comfort zone as much as possible, taking on work that is new and hard for me, stepping into new and often frightening situations and noticing how this is for me and the impact on me and the impact I have on others</p>	46
<p>11. Therapy: the theme refers to items like having regular therapy, psychotherapy or counselling, 12 steps fellowship meetings, somatic psychotherapy, working with therapists to understand my map of the world, my biases and preferences</p>	40
<p>12. Practice, Practice, and Practice: this theme refers to items like finding more and more chance to practice OD, paid or not, to increase one’s experience in consultancy</p>	34
<p>13. Networking: this theme refers to items like pursuing social, professional and on-line contacts with others, building a strong network of professional as well as social networks, engaging in web and online discussion, apprenticing myself to elders in our field, informal discussion with like-minded colleagues</p>	28
<p>14. Never thought about this Question: items in this theme include brutally honest answer from respondents naming that they have never thought about this question. For example, I don’t but I need to; nothing; unfortunately, I do not do anything very deliberate and systematic to improve the Use of Self</p>	16
<p>15. Unassigned: items here are not completed, half sentence, and statements are not interpretable.</p>	24
<p>Total data items assessed and collated – 1767</p>	1767

Our Observation of Table 22 and 23 - Part II of Q135 and Q136 – type of activities of development

At the end of Part I, there are 8 priorities (organized in 4 clusters) that emerged about what respondents see as important to develop their effective Use of Self. In Part II (from Q135), 8 types of development activities have been identified by respondents as appropriate to support them in doing so; and in Part II (from Q136) 14 regular activities that the respondents said they are doing – at the point of the questionnaire – that help them to improve their Use of Self. The lists are very encouraging as most respondents are already working on how to keep themselves sharp and grow their own optimal Use of Self. (Note: A special thank you to respondents for your patience in answering two similar questions).

When cluster the 8 items from Table 22 + 14 items from Table 23 of the type of activities across the two questions (Q135 and Q136), six types of developmental practices/activities emerge. They are described in Table 24:

In summary, the data from the respondents in this area offers a rich list of ideas for OD Practitioners to consider how to grow their Use of Self. It is important to state that different types of activities fit different types of people, and as long as ODP's are doing something to keep themselves growing and sharpening their practice, that is all that matters.

Our Observations of Table 24: The data from these two questions satisfy our curiosity that indeed the respondents are (1) investing time to develop their Use of Self seriously, (2) many of them have actually named the activities they have been and are doing because they have recognized what are the top four priorities of development for themselves, and (3) many of them are still experimenting with the “right and fit” development activities for them.

What's the implication for those who are providing educational and development activities for ODP? We know from this data that the respondents' desire is to be stronger in confidence, to know “self” better, become more savvy in handling the

Table 24: Type of Developmental practices/activities

Development Activities that keep ODP sharp in their Use of self.	Rank order	Total no
Engaging in reflective practice – (journaling, self-reflection, having clarity on emotions and thoughts, going inward)	1	496
Debriefing/giving and receiving feedback/reflection with others (having pre- post event conversation- learning from each other)	2	353
Attending workshops, developmental events, conferences to learn	2	353
Continuous learning to develop myself (reading, observing, self-taught, researching new topics)	3	314
Receiving coaching, mentoring, supervision – individual and group, and peer support, action learning	4	308
Spiritual practice/meditation/mindfulness – going on retreat, and other spiritual practice, making space to regular reflect.	5	283

*Note: Table 24 is not the summation of Table 22 and 23 because not every single item fits into the 6 Themes.

dynamics between themselves and others, and being more effective in managing themselves for positive impact in a very tough environment. So the questions we have for the development and education providers - What types of curriculum will help to support OD Practitioners in their professional journey

in sharpening their instrumentality? What continuous development activities that we will need to provide to ensure practitioners at different stages with benefits from continuous learning and development?

Cluster 3: Self-care habits

Table 25: Q 137 What self-care habits have you developed that help you to maintain your energy, focus and sharpness? Nine themes were extracted from the data around this question.

Put priorities to maintain my physical wellbeing (926)	Counts
Regular physical exercise - Going to gym, walking, running, hiking, cycling, Pilates, horse riding, toning exercises, cardio	360
Good diet - Eating well, healthier diet, less alcohol, more water, organic food, more nutritious food	155
To have enough sleep + regular napping - Go to bed earlier, getting at least 7-8 hours of sleep, take the practice of regular napping to refresh the energy	135
Gentle exercise - Regular yoga, Tai Chi, Qi Gong, Kung Fu, gentle stretching, deep breathing exercises, kata, aikido, vipassana	129
Regular resting, relaxation, alternative bodily treatment - Give myself dedicated space and time to rest and recovery, regular bubble bath, spa visit, massage, chiropractic adjustment, acupuncture	80
Be with Nature - Going to beautiful places, regular walks in the forest, walks on the beach, the awesomeness of mountains.	42
Trying to lead a healthy lifestyle - Intentional about leading a balance and healthy life, integrated all aspects of what will maintain our sense of well-being to ensure I am in top form	25
Leading a more contemplative and reflective life (345)	Counts
Meditation, practice of mindfulness - Morning meditation, evening end of day meditation, practice mindfulness throughout the day, mindfulness walking, staying mindful throughout the day	182
Regular reflection and journaling - Journaling before and after doing a big assignment, regular reflection and writing my thoughts down, I have three journals, I journal for over 40 years, to keep my head clear and clean, including talking to self, thinking out loud of my jumble thoughts	99

Spiritual practice - Pray, worship, having spiritual director, attending fellowship, attending church	64
Recreation - Doing fun and energizing things (357)	Counts
Reading and listening to podcasts - Read anything from theory, fiction, documentary books, history, anything that opens my perspectives in life and take me to a different world and get me off work	94
Using hands to make and do things - Heavy cleaning, making small things for the house, doing hard labor projects, gardening, cooking, baking – so relaxing	67
Music, dancing, theatre - Listening to music is very important, singing in the community choir; directing church worship, going to theatre, love dancing, taking dancing lessons, playing my guitar	61
Travelling, holidaying - Love to travel, learn new experiences, finding out how other people live and play, an important part I do with family and friends	40
Watching TV, movies and playing games - Love a good movie, watch TV with family to relax, Bridges, sudoku, any games with friends and family and to have a good laugh	35
Art - sketching, drawing, doing quilts, attending art exhibition, museum, signing up for drawing class	34
Creative hobbies - Do something new, learn new language, learn new skills	14
Spend time with pets - Love to spend time with my horse, dogs, love to walk the dog	12
Take more time to engage in social time and connection with others (273)	Counts
Spending time with family - Being with my children, partner, grandkids, grand nephews, people whom I love and who love me, wonderfully nourishing, enjoy being loved and love by my family	101
Having meaningful and deep conversation - So important to have debrief conversation with colleagues, talk about something important to my wife/husband, having special conversations about something significant in the world, the need to talk with people to make sense and to test assumptions	72
Spending time with people, especially friends - Meeting up with friends, build up our friendship, meeting new people, find out how much fun it is to meet people who are new and different, and we usually have a good time.	63

Nurture relationship with people who feed my needs - Surrounding myself with “go to” people for support/also like-minded individuals who know my type of work, forming strong supportive network, someone who does not have a negative and draining personality, prioritize time for important relationships	37
Be “Time-Rich” to restore and enrich self (183)	Counts
Having “alone time” - building personal thinking and feeling time, having regular silent retreats, annual one-week retreat, regular quiet and alone period to refuel and recharge, listening to my emotion/body, try to get back in tune with self, use the time to think about work, about ideas, watching out for my emotions	70
Creating more “me time” - Taking time off, doing things that will energize me, spending time to respect what I would need	52
Do nothing - allows the mind to wander, stay free and open, stare out the window, sit quietly in or outside of the house. Let myself wander, go with the flow, live in the moment, stay in an empty space	32
Build personal thinking/feeling time - putting down slots/spaces to allow thoughts and feeling to come up and reflect	19
No digital and portable tech time - Turn off all technology at night, or in the morning. Do not use Facebook or twitter, just stop spending time on smart phone	10
Planning/structuring my approach to work – proactively prevent stress (195)	Counts
Care package for self - Enjoy good work done successfully, remind myself what I am doing, respecting seasons and rhythms of my life, doing work with people I love, learning to say no, keeping a clear and strong boundary between work and private life, know when to stop and switch off	62
Take diary management seriously to create space for being and not just doing - work 3 days a week, observe working hours, not work over the weekend, work 4 days a week, not work late in weekend, quarterly get away for time out, take weekend off, not work all hours, have dedicated undisturbed time, work less, create time out, not work more than 90 minutes chunk, regular breaks during the day, learn to detach from work, take regular breaks, do not take too much work, diarizing time off, dedicated undisturbed time in my diary, limit the hours I work, make sure there are lots of time I am not working, work average 73 days per year, work from home a lot, stop when I am tired, do well in managing my work load, not take on more work than it is planned, set limits about work, to make sure there are time to play and to have down time, time away from the office, scheduling balance, block out diary for general catch up with people who are important to me	60

Saying no and holding boundaries between work and home - Highly selective of projects and clients, when the diary is full, will not take more work, work 3 days week, finish work at 6:00 and be with family	33
Better planning - I do plan my work load seriously, I have weekly plan, I plan what needs to be done, what resources are needed, have clarity of tasks, clear objectives, I focus on accomplishing one task at a time, I track progress, I prioritize what is important, I do career planning, Managing short- and long-term goals	24
Improve my approach to work - Prepare well for my assignment, setting intention for important meeting, pay attention to my emotion before working, do centering practice, e.g. body scanning while the works are being done, I arrive a day early to focus and stay a day later to rest and reflect, decompress before and after heavy event, do solid design, dedicate prep time	16
Keep learning and growing (118)	Counts
Attend developmental events - Attend workshops, conferences, learning new things, belonging to action learning set	69
Have a coach, mentor, supervisors - Good to have someone to debrief, reflect, help to grow and be held accountable, have an accountability partner and receive feedback	25
Work with therapists - Attend therapy, counselling, work on unresolved issues	11
Do more creative writing - Write about anything, poetry, articles for the trade, how to express my thinking and value	10
Stop - Stop participating in any activity or meeting with people that will impact my inner peace because of the people negativity, outlook, personality, mindset	3
Building positivity (43)	Counts
Kind thoughts to self - holding positive thought of self, having a laugh, and learn to forgive myself, living in gratitude, compassion for self, generous with self, holding realistic expectation of self, celebration of good work, bracketing, compartmentalize issues, thoughts, pay attentions on what's the trigger, remember why I do this work, and overall choose life, say yes to joy and ease to courage	38
Self-management - Do more bracketing, compartmentalize issues and thoughts	5

Connection with community (19)	Counts
Participate in community - Do pro bono work for the community, doing more charity work, help to pick up litter, sits on committee	19
Others (40)	Counts
I do not have a healthy self-care habit	26
Unassigned	14
Total data item for Question 137	2499

Observation from the responses of Question 137

This questions as shown in Table 25 by far has the largest total number of data items (2,499), not because there are more people who answered this question, but because most respondents listed a range of things they are doing or attempting to do in search of a way to maintain their sense of well-being. When a respondent wrote in five qualitatively different things they do, we counted it as 5 different items.

The responses on what self-care habits will help to maintain energy, focus and sharpness also gave us a summary narrative of what ODP’s do to stay physically fit, e.g. having a healthy and nutritious diet, getting enough sleep (include having regular naps), doing fun things, interacting socially and building better structure in their work approach – from managing diary to building a balanced, healthy life style. While these essential items may sound simple, it’s important to remember how hard they can be to implement regularly, especially for those ODP’s who are very successful in their consultancy work.

From the large number of items submitted we

can safely assume respondents are taking self-care more seriously, they see how self-care practices do play an important part in keeping them a sharp instrument, instead of letting the work dull their skills and practice. Is there a qualitative difference between self-care and life-long learning and development? We believe there is. By investing in self-care, we ensure we are not heading down a path that makes burning out an inevitable reality, as we are bound to run out of energy and motivation because the business, we are in is incredibly demanding.

Finally, through the diverse and numerous avenues of self-care activities the respondents reported, we’d like to encourage practitioners that it is never too early to build a healthy self-care habit so that our default way of sharpening our saw will follow us from being a novice to when we become experienced practitioners.

Cluster 4: The Impact on Others when I am at my best. 9 themes are extracted.

In terms of cause and effect question, this is the only one we set out to encourage practitioners to self-assess what happen to them and their client when they are in their best Use of Self stage.

Table 26: Question 132: What impacts do you personally feel your best Use of Self creates for others?

Themes	Counts
1. Provide Safety and Spaciousness for others to do their work (148) <ul style="list-style-type: none"> Provide Sense of safety for us to do necessary work Provide a sense of spaciousness for people to do their work and support them to stay open 	<p>85</p> <p>63</p>
2. People become bigger and have more confidence (135) <ul style="list-style-type: none"> Increased self-belief and with greater confidence People reported that they can be themselves and they feel bigger 	<p>89</p> <p>46</p>
3. People are able to see better, generate new perspectives, and increase hope (98) <ul style="list-style-type: none"> Able to see better and generate new/alternative perspectives People experience hope and want to learn and grow further 	<p>70</p> <p>28</p>
4. People are able to take action to shift self/others/environment (89) <ul style="list-style-type: none"> Self-empowered and able to take action People feel energized and able to make shifts/movement 	<p>38</p> <p>51</p>
5. Improve understanding of self and others with better relationship and conversation (84) <ul style="list-style-type: none"> Improved understanding of self and others and form better relationship Clients improve in knowing how to have meaningful conversation 	<p>63</p> <p>21</p>
6. People become more self-aware and become more open (64) <ul style="list-style-type: none"> Increased self-awareness More open about their emotions and willing to be vulnerable 	<p>48</p> <p>16</p>
7. The work is able to impact the system (49)	<p>49</p>
8. Respondents reflect their definition of Use of Self when in action (120)	<p>120</p>
9. How does “Use of Self” impact the practitioners (14)	<p>14</p>
10. Unassigned (12)	<p>12</p>
Total Data Items for Q132	<p>813</p>

Our Observation from Q132

When asking this question, we intended to find out a) whether respondents can recognize when their best Use of Self is in action; and b) when OD Practitioner's best Use of Self happens, are they aware of their impact on those they serve?

Analyzing the data, we found a clear recognition among the respondents when their best Use of Self is in action. There are 120 clear statements on when they are using themselves. For example

- *My best of self always aims at mutuality at multiple levels of interactions...*
- *when I (personal) learn, we (Client and I) learn, and they (system members) learn;*
- *my best use of self is supported by my authenticity, comfortable in my own skin*
- *ability to do provocation, being honest, humble, able to share vulnerability,*
- *high self-awareness and heightened intuition;*
- *when I am a model for how to behave in the setting,*
- *helping client to know other ways to behave;*
- *when my ability to understand where people are at and how I read the room or the place, then synthesize this data with wider context enable me to look at the issue through the system and acknowledge this with senior leaders are what make me effective;*

- *It is important to lift energy,*
- *always encourage truth-telling,*
- *role model vulnerability and increase self-awareness in all we do;*

The data items clearly reveal that most respondents recognize when their Use of Self is at its best. Beyond that recognition, respondents are also able to identify the type of impact their best Use of Self has on the individual, group and system they work with. Reading their descriptions has been very inspiring because after all, when our Use of Self is in action, it does achieve impact.

Looking at the data more closely, **Theme 1** is about providing safety and spaciousness for others to do their work. The word spaciousness occurs many times, having both a literal and psychological meaning. For example:

- *People feel that I get them and help to create psychological safety;*
- *when I really listen to them and accept them for who they are, they feel safe to open up and share things that they sometimes have shared with no one else before;*
- *create a safe space for people to explore their feelings, new ideas and differences/similarities within group;*
- *give client a deepened feeling of spaciousness in their moment to moment experience;*
- *people appreciated my ability to create space and environment where others can bring their own self into the processes;*

- *I can provide a space of non-judgement and empathy for rest and respite in a hard driving culture;*
- *when I flow I am good at creating a sense of space, a calm and deep listening space in which people can experiment and learn;*
- *give client a sense of spaciousness, an expansion of possibilities, and creativity;*
- *when I am using myself, I help to give courage to others to be more of themselves;*
- *clients have a stronger sense of self-efficacy;*
- *clients increased their belief in their own self, their self-belief and courage increase;*

As a result of spaciousness, people become more self-aware and become more open (**theme 6**) to improve their relationship and conversation with others (**theme 5**), highlighted in the following examples:

- *I am there to support their increase of awareness;*
- *at my best, I create openness, willingness to share and be vulnerable, supportive;*
- *people are willing to open up areas of discussion that were not on the table before;*
- *my “use of self” provide openness, connection, comfort and willingness to do work.*

On top of that, clients and OD Practitioners both become bigger and have more confidence to do the work that is set out for them to do (**theme 2**), for example:

- *At my best, people feel understood, heard, and appreciated for their ideas, contributions and competence.*
- *They can imagine and believe that they can take their dreams seriously;*

- *when I am at my best, clients felt that I have unconditional positive regards for them;*
- *they feel confident with me and the relationship;*
- *operating at my best, I can help people to see their “best” version of themselves, reducing shame, increasing self-acceptance.*

The data from theme 3, 4, and 7 reveal that we are able to see new perspectives and generate new possibilities with hope (**theme 3**) which will result in people being able to take action to shift self/others/environment (**theme 4**). This will result in the joint work between clients and ODP's to impact on the system in partnership (**theme 7**), for example:

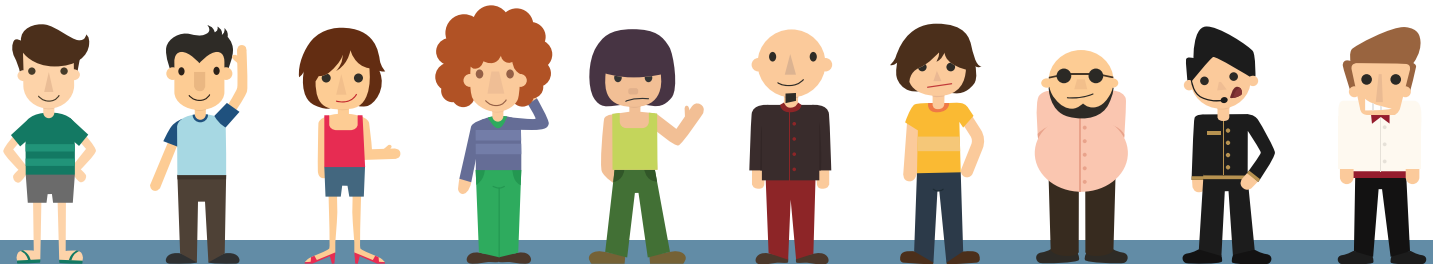
- *I enable the client to see the world in a different way and opens them up to possibilities that were previously invisible;*
- *I am good in facilitating new thinking and ideas when I am operating at my best;*
- *my best can often shift people perspective and thinking which lead to behavioral change and new outcomes experienced;*

- *people gain insights into their assumptions, inner logic and the logic of others;*
- *when clients can see the whole system and make the connection, they feel more possible to take action;*
- *in my best people are more energizing and generative in their strategizing and actions;*
- *they find freedom and empowerment;*
- *when I operate in my best, people have energy and momentum to take positive, constructive and meaningful direction;*
- *I help the system build its capacity to appropriately respond to its needs and challenges;*
- *in my capacity my best use of self is bringing the system into the room and helping people to bring their best selves in, to relate, think and create as a system.*

There are over 800 data items on the impact an OD Practitioner has when they exercise their best Use of Self. It is very inspiring to read through the respondents' description of what happened to them and to their clients. By asking this one 'outcome' question on the impact of the best Use of Self, we have a list of indicators of what happens when helpers are functioning in top form, and as a result, what happens to those whom the helper sets out to support.

In the end, there are also clear statements from the respondents on what happens to themselves when they experience their optimal Use of Self and what type of impact on others they can witness. This description clarifies why many of us sign up to do this work, and the real motivation to continue to fine tune our self in action. For, after all, that is the unique quality and brand of high-quality OD practice. For example:

- *In my work, I find that the relief others have in being able to tap into, express and act on their authentic self to increase success is a JOY for me to experience;*
- *I feel that I am fulfilling my life purpose when I hear people share with me how my work impacted them and enabled their inner growth, it is this amazing feeling of peace, oneness, knowing... that keeps me going;*
- *It is very satisfying that client learn and have personal success; I feel centered and grounded, it is not a sense of intense elation but an awareness that all is well with my clients and me doing well together;*
- *My work gives me satisfaction and continuous curiosity;*
- *When I see the system working effectively, or when I see people changing for the better or the company, when conflicts have been resolved truthfully, I am very happy.*



4. Summary of the Qualitative Analysis

The qualitative data offers multiple insights about Use of Self.

Firstly, it shows that even an articulate and clear understanding of the Use of Self concept does not automatically translate into one's optimal Use of Self.

Next, the data reveals the challenges OD Practitioners face when trying to be their best Use of Self. Tensions of wanting to do one's best to serve the clients when working in environments that are complex and changing all the time is difficult to navigate. The data about external barriers to Use of Self practice confirms that the workplace, for most of the respondents, is often a very stressful environment with leaders and colleagues working out their stress on each other and to those who are supposed to support them. On top of that, the combination of misalignment between what needs to happen, and what leaders perceive needs to happen often puts OD Practitioners in a hard place, e.g. the difficulties of reaching leaders for clear commissions, the challenges of colleagues who are losing part of their relational civility, and their reluctance to working collaboratively.

64% of the data shows us the key internal barriers are lack of confidence, fear, uncertainty about how to leverage one's personality, and how to manage one's default orientation towards people. Many admit that they are stuck in a holding certain attitude towards people which make them ineffective in their practice. The combination of – even occasional – senses of shame, stuckness, fatigue, and inability to rise above these barriers – are not good for our long term well-being. So, we need to encourage each other to work through these barriers to stay potent in our work.

Also, respondents are aware that a lack of self-care and lack of time for reflection cuts into their sharpness in practice. When they are not in top form, they often succumb to those external situations and types of challenging people who trigger them. If such triggers and sensations are not managed properly, it prevents OD Practitioners from being in their optimal self.

Having said that, should OD Practitioners, who are called to support a living system, be more robust and confident about who they are, freeing up more capacity to focus on the support work at hand? The purist answer is YES. But what do they need to do to find that confidence and become the sharpest tool and support instrument? The qualitative data offers some advice.

As we end this part of the data analysis, we both experienced strong internal sensation when we cut the data because of the level of honesty and dissatisfaction practitioners shared in these questions – there are real struggles, wanting to be the best for the clients, yet the nature of OD work constantly demands them to know what they should do, but yet because of being human, such work is not really doable all the time. The sense of shame and guilt seeped out from the data.

We notice that respondents to Q135 and Q136 clearly identified the developmental priorities they want to have. Developing their self-awareness was the top priority, followed by developing a deeper understanding of people (others) while building tolerance and trust among those they serve. The third priority is to increase self-management to navigate the ever-challenging world while developing greater acceptance, tolerance, patience, all with less judgment of others. The interaction of these three priorities will definitely help OD Practitioners overcome a range of their internal and external barriers.

Prioritizing one's development, coupled with being willing to work on unresolved issues, improving self-care habits and taking strides to improve self-confidence, is critical to optimizing one's Use of Self.

It is heartwarming and encouraging to see the long list of developmental activities the respondents said they are currently (or aspire to) doing to keep themselves sharp. If receiving coaching, supervision, peer support, and seeking feedback were collated into a category, that category would rank as the top developmental activity. The next priority is engaging in reflective practice. We are pleased to see spiritual and contemplative practices also ranking high in this data. The remainder of data points include seeking more practice experience and more formal and informal developmental activities. If OD Practitioners can link their priorities of development with the right type of developmental activities, we will all be operating at the edge with much less burn out.

This leads us to the question about self-care which received close to 2,500 statements. From the large number of responses, we can safely assume respondents are beginning to take self-care more seriously as they realize doing this type of OD work requires regular refueling, re-energizing, and replenishing.

As we have said, OD work by nature is challenging. In order to use one's self to constantly capture data, observe what is going on at multiple levels of a system, make intentional choices as to what to do, and not have the certainty about the outcome of any intervention, we will need to be savvy with an applied behavioral science lens, a brave heart, and self confidence that – regardless of the challenges of external environment, there are sufficient resources in our inner being to enable us to function well in these

contexts – hence self-care is no longer a luxurious option.

The final data set about the impact on Use of Self was very inspiring to analyze. Respondents know when their self shows up and they do a great piece of work – using their instrumentality to affect the system, they can see that people feel safe and they become bigger, more confident, more self-aware, and become more open to collaborate with others. Conversation becomes more generative and new perspectives emerge. Respondents also reported people feel more ready to take action to shift the situation they are stuck in and feel they can create more impact within the system. When practitioners see the fruits of them “selves” working well, they become contented, satisfied, and happy, knowing that they can partake in these human situations with positive impact.

It is through this last question on impact that we begin to develop a sense of causality between the best use of oneself and the impact on the system and the people within it.

The qualitative data generated a lot of food for thought for both of us. We want to encourage developers, educators, supervisors, mentors to think about the implications for what they have to offer to OD Practitioners themselves. As for ODP's, the data shows that it is worthwhile for us to continue to pursue a life-long journey of sharpening our instrumentality and have a deeper understanding of who we are in service of the clients? By perfecting ourselves we become more than a helper, we become ambassadors for relational civility in the workplace, community, and society? And to sustain situations that will continue to support human potential to do well? As we do this work, we are asked to do our own work. No other profession will grant such luxurious opportunities and outcomes.

VI

Final Conclusions



This piece of research and the report has been the result of 2.5 years, in the midst of serious illness and other types of obstacles. But we feel incredible privilege and gratefulness for being given life to finish this report and get it in your hands. We believe the results have enough data for the readers to draw their own conclusions about the role of Use of Self in our practice. For us, the picture presented by the data gives a coherent pathway for all of us, as scholar-practitioners to build our optimal use of ourselves more effectively and help others develop this essential mind- and skill-set.

There are three ending remarks that are more our own reflection than further conclusion for you.

1. From The Five Factors – What is Important to Our UoS

- a. Importance of relationship-centric values and behaviours (4.07)
- b. Continuous development of self and others awareness (3.85)
- c. Using cognitive and emotional ability with courage to serve dynamic systems (3.80).

- d. The ability to self-manage oneself effectively in emerging situation (3.75)
- e. Experiences of best Use of Self (3.68)

When the top four factors are present in the practices and habits of the OD practitioners, then the impact, as felt by self and those whom we serve, will be evident as illustrated by the fifth factor. The quantitative data also told us that our attitude towards people and our willingness to put relationships as our top work, is more important than any tools and clever methodology. Also, without the habit of life-long learning, our practice will not be able to sustain. It is for the sake of those we serve, we will want to improve in our trade knowledge, expand our mind, being affiliative and disciplined enough to be able to do courageous intervention with our clients. When that happens, the brilliance of our real purpose, of our calling, will be shining and make our hearts sing (yes this could be too cheesy for some of you).

2. From the Qualitative Data

The qualitative data reinforces what we found in the factor analysis. It told us to stay sharp in our practice we will need to *identify*, *own*, and

engage in lifelong learning and development to minimize the force and impact our internal and external barriers have on our practices. Without that willingness and motivation to become more grounded, more confident, less reactive and more available to those we help, we are setting both ourselves and our clients up for ineffective outcomes and incomplete experiences.

From Q135, every respondent will have their own priorities as to how they would like to stretch themselves in order to improve their effectiveness. As to how we want to achieve our own goals, again each of us will need to choose what we need and can do in order to care about ourselves in our own professional development journey.

The purpose of doing all the above, is to get the golden prize that we may be effective in helping those systems we serve to have greater health and greater performance to serve their stakeholders.

3. Other Key Points For us to Ponder and Act on

- a. There are relatively decent average means on Use of self across the globe. All sub-groupings emerged in the high 3's or low 4's which shows some competence in these areas of practice. We also saw that various sub-groups had higher and lower means on specific factors, suggesting areas for more developmental work. OD (and Use of Self) are clearly being practiced in different parts of the world and this study helps to see ways we can all be learning from and helping each other
- b. Our respondents vary in their education and years of experience. This variation did not give us a clear

conclusion as to whether experiences are enough to support the individual towards mastery, or more education and development will be a faster or reinforcing route to help practitioners to get there. The average does show both experiences and education do make some differences in ODP practices. However, these opportunities are not evenly spread around the globe and should be improved.

- c. We do need a more common definition and description of Use of Self. But the question is – does that matter that much as long as most OD practitioners understand it is not their tools and methodologies that will make them masterful, but it is the way they will use themselves in the moment to achieve impact and change that matters?
- d. If what the respondents reported about their internal and external barriers are in some form reflective of what other OD Practitioners may feel about their agency and confidence, then those who are responsible to educate, grow, and provide continuous development to OD Practitioners have to rethink what they are currently offering and make changes in the curriculum.
- e. Given that more and more OD Practitioners are doing this work independently, either as solo internal practitioners or external practitioners, we wonder whether there should be more collective communities of practice set up (in various forms e.g., action learning set, supervision, group supervision, professional groups, etc.) where OD people operating with little collective support, will have a forum to be accountable to, check the quality of work, and stay in continuous development work.

- f. There was a wide array of ways people wished to continue their development and exercise self-care which is very hopeful. However, it seems that devoting the time to ourselves is still very difficult in today's fast-paced, chaotic world. As we know, this field of practice is very draining, and therefore, we all need to prioritize of our self-care and development.

4. Implications for OD Practitioners (what the data tells us)

- a. Understand how core this is for all we do in our work and lives
- b. Dedicate more time to learning. Especially filling in any gaps in knowledge or skills, practice as a development tool, pursue and use feedback, participate in personal coaching, individual supervision, group supervision, and use a personal social system to have support, challenge, and caring.
- c. Understand our own strengths and less developed areas. What do we accept about ourselves and what do we deny? What are the responses telling us about us?
- d. Change our self-messaging. We all have narratives we have learned and tell ourselves regularly, even when they are not accurate. Change our self-talk to guide new narratives.
- e. Another aspect of self-awareness that is often overlooked are our personal triggers and hooks. What generates our reactive selves? In what ways do we lose our control or emotional stability? We can always do some work to understand, manage and/or eliminate

these aspects of our behavior.

- f. Use the 9 clusters from the literature search to reflect on your development.

5. Implications for those who educate and develop OD Practitioners

- a. It is sad that around the globe there is not abundant places that teach or build experiential learning on Use of Self. While there are actual credit-bearing courses in some master's programs and Use of Self is included explicitly in other programs, there are few around the globe. Unfortunately, many OD educated people never learn about or develop their Use of Self during programs, leaving it to informal ways to learn or have that knowledge passed along. There are substantial theories and practices that can be used to help people learn and practice better Use of Self. It would help to have it explicitly included in any formal or informal learning programs. It must be upfront and made clear how central it is to our effective practice. There are individual and collective aspects that support such learning (Minahan and Cheung-Judge, 2012)
- b. Our professional organizations around the world need to advocate and assert the importance of Use of Self and include in any "competencies" "standards" "person specification" needed.
- c. With new people discovering and entering OD today, we should intentionally attend to new entrants and try to use development sessions, buddying, mentoring and coaching by experienced OD Practitioner's to help them accelerate their learning and practices in support of their Use of Self.

- d. For those who want to carry out further research, it would be helpful to eventually create a way for a practitioner to receive inputs on their Use of Self from clients and colleagues who may see them differently. It is through diverse feedbacks and opinions that we can investigate the outcome of Use of Self on clients system. A 360-form of instrument will help in continued development of the concept of Use of Self and in individual development.
- e. Finally, since continuous learning and development are critical in Use of Self and contemporary OD, there is a need for on-going opportunities for renewal and further development, for all OD Practitioners, from novice to mature and experienced, to continue this life journey.

This study, the first of its kind, has told us more than we previously knew and gave us much food for thought about what to do about developing Use of Self. Having said that, we are very aware of the imperfections and limitation of our endeavor, and there is so much more we could have done to make this piece of research more robust and more expansive. For example, there is very rich data from those 6 open questions – further analysis may give us even more stories and cases to work with; and there are data specifically pointing at the situation for internal consultant....etc. Somehow, our physical health – via time and effort have limited our effort. All we hope for now is that what we have presented in this report will have been useful in different ways for different people. May we encourage you to continue to pursue this concept through development activities, writing and further research to build up this backbone of our OD practice.

We like to end in a philosophical note: during our data analysis, a range of internal sensations emerge within us. We feel the pain and challenges so many of the respondents are

sharing, answering the questionnaires become a depository place for their honest confessions about how hard it is to keep one's SELF intact throughout the work. We want to acknowledge that OD work is inherently challenging as we are working within a very complex context, and within a "living system" where things are neither controllable nor predictable as the core properties of human nature are constantly acting out in different ways, affecting our sense of independence and agency, freedom, the need to co-create, self-focus. This context requires us to be vigilant, watching, observing, changing tact, using data from here and now to shape a longer sustainable outcome when the opportunities occur. Also, the state of the workplace is characterized by people experiencing high anxiety and unresolvable stress which they freely pass on to others, especially those who are called to support them. So, to do the work well, OD Practitioners need to pay attention simultaneously to different levels of system – intrapersonal, interpersonal, group, inter-group, sub system, and whole systems. This discipline and practice is mentally, psychologically, emotionally, and cognitively demanding, difficult and taxing.

It is in this demanding and taxing context that – if we are to do masterful and sustainable work, we need to surface, own, invest time to work with our interior, become stronger in managing and dealing with those tough external barriers in the "here and now." We do not need permission to engage in self-care practices, in fact, if we ignore self-care, it will be for our own peril. We also need to learn to forgive ourselves, using Herb Shephard 8 rules, to stay alive. We need to hold on to our original intention of entering into this field, our experience in feeling the excitement of seeing ourselves in flow and the impact our work has on others -- which hopefully will keep us anchored to support, defend this field of applied behavioral science while becoming a person we are proud of. May we thank the respondents again for your effort, and the readers for you to preserve to this last page. All the best to all of you.

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APPENDICES

Appendix A - List of Sponsors and partners

Universities & Education

Roffey Park Business School
Singapore Civil Service College
Ateneo University Philippines
Bowling Green University
Phila College of Osteopathic Medicine
St Josephs
American University
Benedictine
University Francian Victoria in Madrid, Spain
Univ of Hull
Phila Univ
Queens University
Case Western University
George Mason University
Assumption University
Pepperdine University
Northwestern University
Konan University – Japan
Penn State University
Royal Roads University
University of San Francisco
Fielding University
Calrine University
Saybrook University
Henley Business School
University of St. Thomas
Sonoma State University
Universidad de Monterrey

OD Organizations

Institute for Organisation Development
ODN Europe
NTL
NTL OD Certificate Program
NHS DO OD
Asian ODN
South African ODN
IODA (International OD Association)
OD Network
OD Practitioner Editorial Board
ISODC – Intl Soc of Org Dev and Change
MNODN
China ISODC + other networks
Corp Research Forum
OD Gathering group
AU PA Group

Businesses

Mighty Water Consulting
Mayvin
Pentland
Medtronic
Time Inc
Rolls Royce
Robinryde Consulting
Boehringer-Ingelheim
Alliant
Flow Consulting Group

Public Office Support

Director of Organisation, Development, Design and Learning for the Civil Service - UK Central Government
European Commission

APPENDICES

Appendix B - Copy of the instrument

Before you start the survey, please click on the following link to read the invitation letter from Professor Dave Jamieson and Dr. Mee Yan Cheung Judge which will give you a fuller background of this survey. NOTE WE WILL LEAVE THE SURVEY OPEN UNTIL APPROXIMATELY JULY 30, AFTER WHICH ANY NEW DATA WILL NOT BE INCLUDED IN ANALYSIS BUT CAN STILL BE USEFUL TO INDIVIDUALS AND TEAMS.

[Invitation to participate in a global use of self U of S research study](#)

If you have viewed the invitation letter which was sent to you in an email, you may proceed to the Consent Form.

CONSENT FORM

Use of Self Global Survey Consent Form

The purpose of this study is to build a deeper, more robust understanding of the concept and practice of Use of Self. You were selected as a possible participant because you have at least 5 years of OD practice experience, internally or externally.

This study is being conducted by: Dr. David W. Jamieson, Professor, University of St. Thomas and Dr. Mee Yan Cheung-Judge, Director, Quality-Equality Consultancy. This study was approved by the Institutional Review Board at the University of St. Thomas.

If you agree to participate, we will ask you to answer several survey questions focused on how you describe your use of self across a number of categories, such as how well or how often you do certain things or regarding your experiences in optimal use of self. The survey should take 45-60 minutes to complete and can be completed online.

The study has no foreseen risks. There are no direct benefits for participation, but the indirect benefits for participating in the study include contributing to a first-of-its-kind research study about the use of self concept. If you provide your email, we will send you the early study results to provide you with a valuable personal experience in self-assessing your use of self.

You are responsible for completing the survey in a location that offers privacy. Once submitted, the records of this survey will be kept confidential. All data will be submitted

online to the researchers in Qualtrics, and analysis will take place in the United States at the researchers' institutions. In any sort of report we publish, we will not include information that will make it possible to identify you. All data will be saved until July 1, 2022.

Your participation in this study is entirely voluntary. Your decision whether or not to participate will not affect your current or future relations with the University of St. Thomas. If you decide to participate by beginning the survey, you are free to withdraw by closing the survey in your browser. If you do not provide your name and email address, we cannot destroy your data once submitted because it will not be identifiable. You are also free to skip any questions we ask.

You may ask any questions you have now and any time during or after the survey by contacting the researchers. You may contact us at: Mee-Yan (lmycj@quality-equality.com) and Dave (jami1396@stthomas.edu). You may also contact the University of St. Thomas Institutional Review Board at (651) 962-6035 or muen0526@stthomas.edu with any questions or concerns.

By clicking below, I consent to participate in the study by completing this survey. I am at least 18 years of age..

By submitting this form, I agree to participate in the research study and submit my data for analysis in line with the research described above

Global Use of Self Research Project-2018

This research project is a first in our field to engage a wide-ranging, diverse global sample of respondents to create new understanding, knowledge, theory, and practice in the core concept of Use of Self. So that more innovative and effective development programs can be designed to support practitioners' continuous development journey – regardless of what stage of OD career they are in. Hence, your participation will be very important in the research and we want to thank you in advance for participating in this study of the concept of use of self.

While all data will be used anonymously and only reported in aggregate, we will have specific report for the organization/group/institution you have marked as your

APPENDICES

Appendix B - Copy of the instrument

source of this survey e.g. a business school, a particular professional institute, even a country. As for making the data known to you, we are happy to send you a copy of the summary of the results completed. If you wish to receive a summary of results when complete, please include your name and email below.

Finally, if you are open for us to follow up with a half an hour telephone interview in the event we like to pursue your responses for greater clarity, please tick one of the boxes below.

I am willing to participate in a possible 30 minutes telephone interview if chosen

I am NOT willing to further telephone interview

The Questionnaire:

After an extensive literature search, we identified FIVE Key clusters. Hence, the survey is organized around them. Some questions may sound repetitive because certain questions fit into more than one cluster. Please be assured that there is a logical structure behind the items. We will be looking for your responses by asking about: (1) personal characteristics and values; (2) self-work and development practices; (3) use and consistency of various actions in practice; or (4) accuracy in describing your behavior patterns. Please add any missing items under each of the clusters, if they matter to your individual practice.

There are 137 items you will respond to. We estimate the survey will take 45-60 minutes, depending how much you will pause and think. Please note that there is no option to save your answers and return to it later, so we recommend that you set aside some time to complete the survey in one attempt. If you have any trouble accessing the forward and back buttons on each page of the survey, please remember to CLEAR ALL COOKIES AND CACHE IN ANY BROWSER and device you use. It is recommended that you do this before you start the survey. We encourage you to do them in a fast pace without thinking too much, and

then when you submit, you can print it out and carry on with your reflections.

Thank you again for being willing to participate in this research. We look forward to sharing the results with you and the field. May we ask you kindly to pass this invitation and research link to any other clients or colleagues who meet the 5 years' practice criteria.

Mee-Yan and Dave

(I) Global Survey Demographic

We are conducting a Global survey cutting across many cultural, political, social and religious contexts and inherent in those diverse contexts there are huge variations in what are the acceptable categories for how people identify themselves. So, instead of including an exhaustive list for you to tick, we have left most of our demographic questions open for your self-identification.

Please only fill in your name and email if you have agreed to possible follow-up interviews or wish the summary results. Otherwise, please leave these blank.

Please enter your full name

Email address

Country of Primary Residency

Please state the Organization /Group/Institution from whom you received this survey (e.g. ODN US, ODN Europe, a University)

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My gender self-identity

My race/ethnicity self-identity

Years of practice in OD (please fill in your number of years practicing internally and/or externally)

Internal (years)

0	10	20	30	40	50	60	70	80	90	100
<input style="width: 20px; height: 20px;" type="text"/>	<input style="width: 20px; height: 20px;" type="text"/>	<input style="width: 20px; height: 20px;" type="text"/>	<input style="width: 20px; height: 20px;" type="text"/>	<input style="width: 20px; height: 20px;" type="text"/>	<input style="width: 20px; height: 20px;" type="text"/>	<input style="width: 20px; height: 20px;" type="text"/>	<input style="width: 20px; height: 20px;" type="text"/>	<input style="width: 20px; height: 20px;" type="text"/>	<input style="width: 20px; height: 20px;" type="text"/>	<input style="width: 20px; height: 20px;" type="text"/>

External (years)

0	10	20	30	40	50	60	70	80	90	100
<input style="width: 20px; height: 20px;" type="text"/>	<input style="width: 20px; height: 20px;" type="text"/>	<input style="width: 20px; height: 20px;" type="text"/>	<input style="width: 20px; height: 20px;" type="text"/>	<input style="width: 20px; height: 20px;" type="text"/>	<input style="width: 20px; height: 20px;" type="text"/>	<input style="width: 20px; height: 20px;" type="text"/>	<input style="width: 20px; height: 20px;" type="text"/>	<input style="width: 20px; height: 20px;" type="text"/>	<input style="width: 20px; height: 20px;" type="text"/>	<input style="width: 20px; height: 20px;" type="text"/>

In summary, please state the total years in the trade

0	10	20	30	40	50	60	70	80	90	100
<input style="width: 20px; height: 20px;" type="text"/>	<input style="width: 20px; height: 20px;" type="text"/>	<input style="width: 20px; height: 20px;" type="text"/>	<input style="width: 20px; height: 20px;" type="text"/>	<input style="width: 20px; height: 20px;" type="text"/>	<input style="width: 20px; height: 20px;" type="text"/>	<input style="width: 20px; height: 20px;" type="text"/>	<input style="width: 20px; height: 20px;" type="text"/>	<input style="width: 20px; height: 20px;" type="text"/>	<input style="width: 20px; height: 20px;" type="text"/>	<input style="width: 20px; height: 20px;" type="text"/>

Your levels and types of education in OD

- Academic, University-based; Masters, Doctoral Certificates-professionally sponsored**
- Other Formal & Informal Workshop-based; commercial, internal to organization, or professionally offered**

Please write in names of degrees, certificates or programs attended and organizations/institutions offering

Please specify as follows:

For example...

University Masters	MS in OD	XYZ University
Professional Certificate	Practicing OD Certificate	XXX Leadership Institute
Informal Workshop	Consulting Skills	Designed Learning

(II) Before you start the actual survey

Just to repeat that this self-assessment instrument is to support you to reflect on your own UoS journey, as well as giving us data for this global research. To get ready, may we encourage you to think about your 'self' in your work (the best, the worst, the beautiful and the ugly aspects of UoS – recalling different case experiences) before answering this survey. It is important for you when answering these questions, think more about your actual behavioral patterns vs your intention.

Five minutes of reflection may enable you to answer the questions with pace and accuracy. Since this questionnaire is to facilitate your own reflection of your Use of Self journey so far, so please be honest and thoughtful in your responses, as there is no right or wrong answers.

When I think of my Use of Self, I describe it as or I define it as

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Appendix B - Copy of the instrument

These questions will ask you about the five “super” clusters of use of self, including:

- A. Characteristics & Values (about you)
- B. Continuous Self-Work (inner work, self-management habits, self-care)
- C. Practice Skills, Abilities & Competencies (cognitive, affiliative/emotional use, skills, and execution competencies)
- D. Life Long Development Practices (intentional effort to continuously improve the above 3 areas and field knowledge)
- E. Experiences when Use of Self is at its best

Each set of questions will have the same five-point scale but the descriptions of the scale will be different for each cluster. **Explanation of the scales will be stated clearly at the start of each section.**

Section A: Characteristics & Values

The Scale for this cluster:

How well do the following characteristics and values describe me in my professional work:

Not at All means that this characteristic/value is just not part of you



Rarely means this characteristic/value shows up or would describe me very rarely, from time to time

Sometimes means that a characteristic/value is common for me some of the time

Very well means the characteristic/value is usually present for you

Always means the characteristic/value is common, dominant and consistent with you

How well do the following characteristics and values describe me in my professional work:

- A. Characteristics & Values (about you)
- B. Continuous Self-Work (inner work, self-management habits, self-care)
- C. Practice Skills, Abilities & Competencies (cognitive, affiliative/emotional use, skills, and execution competencies)
- D. Life Long Development Practices (intentional effort to continuously improve the above 3 areas and field knowledge)
- E. Experiences when Use of Self is at its best

Each set of questions will have the same five-point scale but the descriptions of the scale will be different for each cluster. **Explanation of the scales will be stated clearly at the start of each section.**

Section A: Characteristics & Values

The Scale for this cluster:

How well do the following characteristics and values describe me in my professional work:

8. I am very trustworthy



9. My behavior shows that I am respectful of others



10. I have great desire and dedication to serving others



11. I put high value in relationships, build and maintain good relationships with others



12. Fairness and Justice are important values to me



13. Diversity, inclusion and equality inform my work



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14. I actively seek feedback from others

Not at all Rarely Sometimes Very well Always

15. I am continually curious to learn more about my self to learn and grow

Not at all Rarely Sometimes Very well Always

16. When tough situations arise, my grounded sense of confidence helps me through

Not at all Rarely Sometimes Very well Always

17. I value humility in my working with others

Not at all Rarely Sometimes Very well Always

18. I am committed to democratic values and use them in design of interventions

Not at all Rarely Sometimes Very well Always

19. I am committed to work and learn in partnership with clients

Not at all Rarely Sometimes Very well Always

20. My client centric values are actively reflected in my approach to consultancy

Not at all Rarely Sometimes Very well Always

21. Humanitarian values are a key reason why I do what I do

Not at all Rarely Sometimes Very well Always

22. Being non-judgmental is a key trademark in my work

Not at all Rarely Sometimes Very well Always

23. I tend to empathize with others

Not at all Rarely Sometimes Very well Always

24. I am compassionate to others

Not at all Rarely Sometimes Very well Always

25. I am attentive to how my and others' values are operating and guiding behaviors

Not at all Rarely Sometimes Very well Always

26. I am patient and willing to wait for emerging realities

Not at all Rarely Sometimes Very well Always

27. I practice participative democracy in all my work

Not at all Rarely Sometimes Very well Always

28. I operate with a belief in the innate desire of all people for growth & development

Not at all Rarely Sometimes Very well Always

29. I make good emotional connections with

Not at all Rarely Sometimes Very well Always

Please add any missing characteristics and value items here that are important to you personally

Section B: Continuous Self Work (inner work, self-management habit, self-care)

How often are the following personal self-work actions part of your professional work:

Very rarely Occasionally Sometimes

Very often Almost always

Very Rarely means that the statement is very rarely true for you

Occasionally means the statement is sometimes true but not very often

Sometimes means the statement is true but not in a regular or consistent manner

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Very Often means this statement is a major aspect of your work

Almost Always means the statement is consistently and regularly true for you, most of the time

.....
How well do the following characteristics and values describe me in my professional work:

31. I am aware of my self; strengths & less developed areas; motivations, fears, and passions
 Very Rarely Occasionally Sometimes Very Often Almost Always

32. I work to deepen my inner work to grow selfawareness and understand who I am
 Very Rarely Occasionally Sometimes Very Often Almost Always

33. I undertake personal work to stay authentic, real and transparent
 Very Rarely Occasionally Sometimes Very Often Almost Always

34. I work continuously to achieve congruence with the various dimensions of my self
 Very Rarely Occasionally Sometimes Very Often Almost Always

35. I invest time and effort in continuing work on my unresolved issues that can interfere with my best work
 Very Rarely Occasionally Sometimes Very Often Almost Always

36. My internal sensations and feelings of what's happening outside me help in understanding what to do in the here and now
 Very Rarely Occasionally Sometimes Very Often Almost Always

37. I have a heightened sense of awareness of how self, others & situations interact and their impact each other
 Very Rarely Occasionally Sometimes Very Often Almost Always

38. I have developed self-care strategies to ensure my energy and resource pool is always being refueled
 Very Rarely Occasionally Sometimes Very Often Almost Always

39. I am effective in managing myself (emotions, ego, reaction....etc) when facing difficult and unexpected situation
 Very Rarely Occasionally Sometimes Very Often Almost Always

40. I know how to stay intentional & choiceful in the present
 Very Rarely Occasionally Sometimes Very Often Almost Always

41. I have a high sense of efficacy & agency when facing challenging situation
 Very Rarely Occasionally Sometimes Very Often Almost Always

42. I believe in my ability, capability to achieve good results for clients
 Very Rarely Occasionally Sometimes Very Often Almost Always

43. I stay curious about my evolving self
 Very Rarely Occasionally Sometimes Very Often Almost Always

44. I work to learn how and why others' behaviors and reactions impact me
 Very Rarely Occasionally Sometimes Very Often Almost Always

45. I regularly work through my own vulnerabilities and fears
 Very Rarely Occasionally Sometimes Very Often Almost Always

46. I stay alert to my unconscious or shadow aspects showing up in my behavior
 Very Rarely Occasionally Sometimes Very Often Almost Always

47. I have regular reflective practices (journal, special times, series of key questions...etc.)
 Very Rarely Occasionally Sometimes Very Often Almost Always

48. I can separate serving my needs from those of the clients
 Very Rarely Occasionally Sometimes Very Often Almost Always

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Please add any missing continuous self-work items here that are important to you personally

Section C: Practice Skills, Ability & Competencies (cognitive, affiliative/emotional use, skills, and execution competencies)

How well do I use the following practice skills, abilities and competencies to support the effectiveness of my Use of Self:

- Poorly
- Adequately
- Fairly Well

- Very Effectively
- Masterfully

Poorly means that this practice skill/ability/competency is hard or just not part of you

Adequately means you can use this practice skill/ability/competency from time to time

Fairly Well means that this practice skill/ability/competency is a regular part of your practice

Very Effectively means this practice skill/ability/competency is regularly present and a strength for you

Masterfully means this practice skill/ability/competency is seamless, dominant & consistent with you

How well do I use the following practice skills, abilities and competencies to support the effectiveness of my Use of Self

50. My ability to take risks is effective to the situation

- Poorly
- Adequately
- Fairly Well
- Very Effectively
- Masterfully

51. I can experiment on the go and am willing to try new ways of work as needed

- Poorly
- Adequately
- Fairly Well
- Very Effectively
- Masterfully

52. I have tolerance for ambiguity and don't need to close down a work cycle prematurely

- Poorly
- Adequately
- Fairly Well
- Very Effectively
- Masterfully

53. I am capable of 'straight talk' and can use my openness & honesty to help disrupt the system

- Poorly
- Adequately
- Fairly Well
- Very Effectively
- Masterfully

54. Most of the actions I take are based on the clarity of my intention

- Poorly
- Adequately
- Fairly Well
- Very Effectively
- Masterfully

55. I have personal regard for others regardless of whether they are easy or difficult

- Poorly
- Adequately
- Fairly Well
- Very Effectively
- Masterfully

56. In difficult moments, I can manage my emotions well

- Poorly
- Adequately
- Fairly Well
- Very Effectively
- Masterfully

57. I pause to understand what is going on in the present & make choices

- Poorly
- Adequately
- Fairly Well
- Very Effectively
- Masterfully

58. I practice clarifying my intentions for each situation

- Poorly
- Adequately
- Fairly Well
- Very Effectively
- Masterfully

59. I consider both desired & unintentional impacts when mindfully making choices

- Poorly
- Adequately
- Fairly Well
- Very Effectively
- Masterfully

60. I use inquiry in relationship building

- Poorly
- Adequately
- Fairly Well
- Very Effectively
- Masterfully

61. I intentionally practice holding important conversations

- Poorly
- Adequately
- Fairly Well
- Very Effectively
- Masterfully

62. I explicitly identify the range of situational choices

- Poorly
- Adequately
- Fairly Well
- Very Effectively
- Masterfully

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63. I regularly check myself on withholding judgement

Poorly Adequately Fairly Well Very Effectively Masterfully

64. I am effective in keeping my emotions separate from clients work

Poorly Adequately Fairly Well Very Effectively Masterfully

65. I regularly check my biases, assumptions, filters, triggers & hooks, especially in working with different types of clients

Poorly Adequately Fairly Well Very Effectively Masterfully

66. I know how to manage my public personas and when they are appropriate or not

Poorly Adequately Fairly Well Very Effectively Masterfully

67. I take in all forms of data from others & situations using all of my senses

Poorly Adequately Fairly Well Very Effectively Masterfully

68. I feel comfortable to take evocative & provocative stances when necessary

Poorly Adequately Fairly Well Very Effectively Masterfully

69. I am sensitive to social dynamics and able to track them in the here and now

Poorly Adequately Fairly Well Very Effectively Masterfully

70. I have good abilities to emotionally connect with others

Poorly Adequately Fairly Well Very Effectively Masterfully

71. Applying/adapting theory to situations is one way I guide my work approach

Poorly Adequately Fairly Well Very Effectively Masterfully

72. I am able to sort, organize data to ascertain patterns in situations

Poorly Adequately Fairly Well Very Effectively Masterfully

73. I regularly develop open, trusting relationships

Poorly Adequately Fairly Well Very Effectively Masterfully

74. I am a system thinker & and can see and understand how the system operates

Poorly Adequately Fairly Well Very Effectively Masterfully

75. I am a strategic thinker & can extract strategic implications in situations and see possibilities

Poorly Adequately Fairly Well Very Effectively Masterfully

76. I can readily understand the 'business' & context of the organization

Poorly Adequately Fairly Well Very Effectively Masterfully

77. I do well in partnering with others

Poorly Adequately Fairly Well Very Effectively Masterfully

78. I keep improving my ability to 'notice' what's going on in and around me

Poorly Adequately Fairly Well Very Effectively Masterfully

79. I find staying present in the here and now easy to do

Poorly Adequately Fairly Well Very Effectively Masterfully

80. I use my internal data; senses, feelings to guide me in my work

Poorly Adequately Fairly Well Very Effectively Masterfully

81. I focus on finding opportunities to help others to learn

Poorly Adequately Fairly Well Very Effectively Masterfully

82. My ability to read other's emotions enables me to be effective in action flexibility

Poorly Adequately Fairly Well Very Effectively Masterfully

83. I have strong process design skills for serving clients

Poorly Adequately Fairly Well Very Effectively Masterfully

84. I adapt designs in real time in service of the client and situation

Poorly Adequately Fairly Well Very Effectively Masterfully

85. I have good behavioral flexibility to adapt in any situation or changes

Poorly Adequately Fairly Well Very Effectively Masterfully

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86. My ability to influence others works well

Poorly Adequately Fairly Well Very Effectively Masterfully

87. I have a strong capability to facilitate others interactions

Poorly Adequately Fairly Well Very Effectively Masterfully

88. I manage issues of differences, marginally and attractions, involving clients and my self

Poorly Adequately Fairly Well Very Effectively Masterfully

89. I can share observations in ways people can hear

Poorly Adequately Fairly Well Very Effectively Masterfully

90. I can use my courage to speak up, take risks or put myself on the line, as needed

Poorly Adequately Fairly Well Very Effectively Masterfully

91. I am able to frame and re-frame issues in service of the client's understanding

Poorly Adequately Fairly Well Very Effectively Masterfully

92. I see situational dynamics and realities clearly

Poorly Adequately Fairly Well Very Effectively Masterfully

93. I have good insight into the psychological safety needs of people

Poorly Adequately Fairly Well Very Effectively Masterfully

94. I can connect intent, choices and impact well when doing complex work

Poorly Adequately Fairly Well Very Effectively Masterfully

95. My listening helps the client to make personal sense

Poorly Adequately Fairly Well Very Effectively Masterfully

96. I function well working on the margin

Poorly Adequately Fairly Well Very Effectively Masterfully

97. I can manage not being drawn into system politics

Poorly Adequately Fairly Well Very Effectively Masterfully

98. I am able to manage the roles and balance in the partnership with client

Poorly Adequately Fairly Well Very Effectively Masterfully

99. I operate with high concern for embedding learning and capacity into the system

Poorly Adequately Fairly Well Very Effectively Masterfully

.....
Please add any missing life-long learning and development practice items here that are important to you personally

Section D: Life Long Development Practices (intentional efforts to continuously improve the areas listed above (A-C) and your field knowledge)

How often do the following practices occur in my professional work:

Very rarely Occasionally Sometimes

Very often Almost always

Very Rarely means that the statement is very rarely true for you

Occasionally means the statement is sometimes true but not very often

Sometimes means the statement is true but not in a regular or consistent manner

Very Often means you do have this practice and it is a major part of your work

Almost Always means this practice happens regularly, consistently, most of the time

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101. I make it a habit to actively reflect on my self & work

Very Rarely Occasionally Sometimes Very Often Almost Always

102. I often check myself on how my habits & default reactions impact on the needs of the client system

Very Rarely Occasionally Sometimes Very Often Almost Always

103. I consciously learn from others behaviors & reactions to me

Very Rarely Occasionally Sometimes Very Often Almost Always

104. I make plans to take care of myself and regularly engage in self-renewal activities

Very Rarely Occasionally Sometimes Very Often Almost Always

105. I have regular practices to attend to mindfulness & calming focus in preparing work

Very Rarely Occasionally Sometimes Very Often Almost Always

106. I actively seek feedback on my self & my impact

Very Rarely Occasionally Sometimes Very Often Almost Always

107. I give myself feedback so that I will keep working on my own issues

Very Rarely Occasionally Sometimes Very Often Almost Always

108. I use my experiences to improve my instrumentality

Very Rarely Occasionally Sometimes Very Often Almost Always

109. I continuously work through my own vulnerabilities & fears

Very Rarely Occasionally Sometimes Very Often Almost Always

110. I consciously develop my presence through greater or deeper integration work

Very Rarely Occasionally Sometimes Very Often Almost Always

111. I intentionally develop my cognitive, perceptive & affective capacities

Very Rarely Occasionally Sometimes Very Often Almost Always

112. Noticing things going on around me

Very Rarely Occasionally Sometimes Very Often Almost Always

113. I devote time to stay knowledgeable about the field

Very Rarely Occasionally Sometimes Very Often Almost Always

114. I regularly explore how to creatively use my self to help others

Very Rarely Occasionally Sometimes Very Often Almost Always

115. I work hard in managing boundaries in my work

Very Rarely Occasionally Sometimes Very Often Almost Always

116. I work to expand my scope of understanding different paradigms, world views

Very Rarely Occasionally Sometimes Very Often Almost Always

118. I & others are in flow and lose sight of time

Very Rarely Occasionally Sometimes Very Often Almost Always

119. My energy is rushing as I & others feel excited

Very Rarely Occasionally Sometimes Very Often Almost Always

120. My use of self feels whole

Very Rarely Occasionally Sometimes Very Often Almost Always

121. I am in sync with clients

Very Rarely Occasionally Sometimes Very Often Almost Always

122. All of my resources are sharp and are available to carry out the work

Very Rarely Occasionally Sometimes Very Often Almost Always

123. Generative behavior & conversations are occurring

Very Rarely Occasionally Sometimes Very Often Almost Always

124. My presence can be felt in the room and is impacting in all directions

Very Rarely Occasionally Sometimes Very Often Almost Always

125. Working at the intersection of self, other & situation seems seamless

Very Rarely Occasionally Sometimes Very Often Almost Always

126. Others are engaging fully

Very Rarely Occasionally Sometimes Very Often Almost Always

127. Ideas are flowing with little effort

Very Rarely Occasionally Sometimes Very Often Almost Always

APPENDICES

Appendix B - Copy of the instrument

128. The whole system is high performing

Very Rarely Occasionally Sometimes Very Often Almost Always

129. The impact of my work is occurring in real time

Very Rarely Occasionally Sometimes Very Often Almost Always

130. The passions of those I work with increase to carry

Very Rarely Occasionally Sometimes Very Often Almost Always

Please add any missing experiences you have had when your use of self is at its best

132. What impacts do you personally feel your best use of self creates for others?

133. What barriers (from yourself) do you think are most common in hindering your best use of self?

134. What barriers (from others or the situation) do you think are most common in hindering your best use of self?

135. What do you think are the top priorities you have in developing the effectiveness in your USE of SELF? And what type of development activities may be appropriate to support you in doing so?

136. What are some of the more regular activities you do to improve your use of self?

137. What self-care habits have you developed that help you to maintain your energy, focus & sharpness?

APPENDICES

Appendix C - Countries Represented

Country	Count	Country	Count
United States	236	Bulgaria	2
United Kingdom	200	Greece	2
Singapore	61	Italy	2
China	32	Mozambique	2
South Africa	24	Myanmar	2
India	16	United Arab Emirates	2
Canada	13	Azerbaijan	1
Netherlands	13	Brazil	1
Philippines	12	Hungary	1
Australia	11	Ireland	1
Mexico	8	Jamaica	1
Belgium	7	Kenya	1
Germany	7	Luxembourg	1
N/A	6	Macedonia	1
France	5	Milano	1
Scotland	5	Pakistan	1
Switzerland	5	Peru	1
Ghana	3	Pretoria	1
Hong Kong	3	Qatar	1
Japan	3	Tanzania	1
Poland	3	Thailand	1
Sweden	3	Trinidad/Tobago	1
		Total	704

APPENDICES

Appendix D - Qualitative Analysis Methodology

There are three methods used in this process:

A Traditional Qualitative Analysis Method, which can be briefly summarized:

- In this process we copied the anonymized excel with the original raw data file to form a new file which become the working document. Then a new left-hand column are added with number for the individual data items starting from 1.
- Then time are spent in reading through the data and common themes become clearer and we begin to group the items under different themes (buckets). The bucket names are written posted on the wall as this process are being done. The names of the themes may change as different data items are allocated to them. Or themes may be amalgamated, or one theme may be split into two or more themes. This happens often when there are too many or too few items in a particular theme group.
- After a while, worksheets for each themes are being created, in each of these new worksheets we label the theme-identifier. Once this structure is formed, then it is easier to allocate the rest of the data to the right theme in the different worksheets.
- As we progress, we keep reviewing whether we are happy with the theme buckets, making decisions on adding new ones or changing any.
- Once all the statements are allocated, a summary worksheet listing are created with the total number of items listed.

B Dedoose – an online system for mixed methods analysis – we used the qualitative aspects.

- We uploaded the anonymized participant responses into Dedoose.
- We went through the responses one by one, identifying the themes present, and marking the response with that theme. No themes were specified in advance; they emerged from the data. This is the essence of Grounded Theory. Each response could have more than one theme.

- The process of marking the response with the theme(s) found in it is called *coding*, and the result is a *code tree* – essentially a list of themes found in the survey along with the number of times each one was found.
- In using this method to analyze, we assigned the code to the specific words in the response which prompted us to assign to that code.
- The number of themes grew rapidly as we progressed through the first hundred or so responses, and quite soon patterns began to appear – new responses contained themes already seen.
- After about 100-150 responses, it became necessary to stop every so often to consider how the *code tree* was developing:
 - The meaning of some codes became clearer
 - Some codes seemed irrelevant and responses marked with that code were revisited and reassigned to other codes
 - Code began to reveal similarities which pulled them into groups
 - It was necessary to check that some codes had not become too vague in their application.
- When all responses had been coded, the process was complete, we then exported the following data:
 - The *code tree* (themes and number of times each theme occurred)
 - A document containing each code, along with all the responses marked with that code.

APPENDICES

Appendix D - Qualitative Analysis Methodology

C CED model by Eoyang using (container/difference/exchange) as a framework to seeing patterns. This method was used particularly on Question 7 -- “*When I think of my Use of Self, I describe it as or I define it as...*”

- For Q7a used the Eoyang CDE model (Container / Difference / Exchange). The model is useful for seeing patterns arising in complex human systems. The system of OD professional, client organisation and OD intervention is a complex one – it is open, has many dimensions and is non-linear – and Use of Self will be one of many patterns emerging in that system.
- We treated each response to the question “How do you define Use of Self” as a statement of pattern and we used CDE as a way to see and understand the pattern.
- This meant that in each response we looked for:
 - *One or more containers* – Something that bounded the idea or set a context for it. For example, people often expressed this as self and client, or self and organisation.
 - *One or more differences* – What is the consultant bringing into the system that makes a difference? What is the difference that makes a difference? This seemed to be the ‘self’ part of Use of Self.
 - *One or more exchanges* – What is getting done as a result of that difference? What interactions are taking place? The ‘use’ part of Use of Self.
- Containers fell into three broad groups:
 - the respondent and the organisation, group, team, other individuals, system
 - self only – no indication of anyone else being involved
 - ‘the room’ or ‘the task’
- Differences fell into two groups:
 - Self as a static, accumulated thing: personal attributes which have formed over time such as personality, style, presence, skills and experience, values – plus the vague concepts of “my whole self” and “my essence”
 - Self as active or dynamic: ways in which respondents spoke about being and doing which I saw as a critical difference rather than an exchange – things like being present, behaviour and language, intuition – things which I saw as qualities which the respondent was bringing, rather than processes (which would be exchanges). The single biggest difference was “My moment to moment awareness” which people expressed in many different ways.
- Exchanges. Respondents were not terribly clear about what they actually did, but there were some clear groupings of themes:
 - Using the difference as an input to inform what they did with the group etc. One might summarise this by saying “I know what I’m like, so I need to take that into account when deciding what to do.”
 - Modulating the difference in the moment. Adjusting whatever they were bringing, in response to what they were experiencing moment-to-moment with a group.
 - Reflections outside the intervention. Some respondents referred to using what they knew about themselves either before or after the intervention, as part of a longer-term reflective process about their work.
 - Self-assessment and self-inquiry. A few respondents referred only to the ongoing process of self-reflection, as if Use of Self was focussed on developing self-knowledge.
- There were many instances where respondents did not specify one or two of the three dimensions (CDE).
- There was also a surprising number (17% of respondents) where the response contained no data at all – we could not identify a Container, a Difference or an Exchange.
- Those were the three methods we deployed in analysing 6 qualitative questions and well as question 7.

APPENDICES

Appendix E – Personal Definition from Qualitative Data about Use of Self

“Awareness in the moment, in the here & now, of *what I am present and aware of in me*, at head, heart and gut, and *what I am aware of around me*, in terms of people, climate, culture, symbols, patterns etc.”

“...my own review process eg, did i *create my presence*, did i *lose self-control*, did i *achieve intended outcomes*, did i *better understand myself*?”

“Being aware of myself in facilitations and coaching engagements “*how I am feeling, my relationship to participants/stakeholders/topic, what tends to “pull or trigger” me emotionally and how that might come up, Being and staying present and with the other to notice dynamics and use my internal reactions as a guide to how I might “intervene”* i.e. the questions I might ask or what I might notice-wonder is going on with person or group.”

“When I’m at my best as an Org Change Practitioner, my use of self is *congruent with my espoused values, offers deep hospitality and authentic reflection on how my behavior, questions and interruptions impact (positively and negatively) on people, conversations and systems.*”

“The way in which *I am aware of, manage, and use my presence in my work*. This requires a strong understanding of the “*filters*” through which I see and react to the world, an acute awareness of how I impact a system, and a deliberate intention in how best to manage/choose my impact for what a client needs.”

“Combination of capabilities: *Situational awareness* (taking in data about persons, groups and situational environment); *Discernment capabilities* (using theory and self-understanding - conscious and intuitive); *Self-knowledge and humility about that knowledge* that helps me to be respectful of others’ views and able to *learn reflectively about my own growth edges*; A sense of humor about *when I’m at my best and worst*; *Acceptance* that the world is not all about me.”

“I describe my Use of Self as trusting in my intuition in observing dynamics, unspoken words, body language, etc. when I facilitate team/group meetings, when I coach clients, when I interview clients during the discovery stage, etc. Use of Self is also about the *use of my body, language, tone of voice, pace of speech, choice of words, gestures, facial expressions during intervention. It is about being aware of my values, my fears, my passion, my saboteurs, etc.* It is about *managing myself, my thoughts, my actions, my response, etc.* It is about *continuously developing myself such that I continue to grow* as a facilitator, coach, OD practitioner so that I stay relevant & up-to-date to continue to support my clients.”

“bringing my *full presence* to each client engagement/relationship where there has been a request for my coaching or consulting. This includes *my theories of practice, my talents and skills, and my unique life experience* through which I have a window onto my client’s needs so I can *help them identify limiting beliefs within their system and point to new choices and possibilities.*”

“My container and actions for my Use of Self is based on my whole being: mind, body and spirit. My understanding and actions are based on my internal and external scanning. heart/mind and physical awareness, contentedness, intentions and courage to take stances (be a change agent for justice, equity and compassion).”

“*understanding and working on myself as an instrument of change* - understanding my identity, voice, power, areas of growth, what “hooks” me, how I respond to others etc. I always say *you can have the best knowledge of tools, theory and techniques but the real question is how you are using yourself as an instrument of change*”

“The ability to ‘*dance*’ with your client - ‘*prod*’ them when necessary - ‘*agitate*’ them so they are irritated by you when necessary and ‘*match*’ their speed and ability not yours”

APPENDICES

Appendix E – Personal Definition from Qualitative Data about Use of Self

“Myself as an instrument of change, *paying attention to data and insights that appear within me as important signs to pay attention to as well as data and insights that emerge or are visible in the organization system and in others.* It’s a deep self-awareness where I *interpret me and my responses, reflecting and understanding how I impact the work, group and individuals.* Using self means to bring this and helps to surface related org / system issues. Using self is *rich and beautiful and helps me to learn more about me, the organization, the work and others in every situation.* It can be *challenging and difficult,* but it is always rich, nourishing. Having a faith in yourself that this is valuable.”

“*Aligning my practice -- how I show up with clients, whether in person or virtually -- with my values (e.g. honesty, integrity, authenticity, compassion, etc.). I strive to be the best me I can be, using meditation and other forms of self-care to develop and maintain overall health and well-being, at all levels of being: physical, mental, spiritual, emotional, psychological, so that I may be appropriately other-focused in my client engagements without entirely losing the self that brings value to the client; in other words, being available and authentic in the client-consultant relationship toward the highest good of all concerned.*”

“I think of Use of Self as *my level of awareness and how I use this in the organisational system,* it’s about *deep sensing skills of me and my concept of me plus deep sensing skills of the client system/ organisation. Sensing my own energy and that of the client system.* It’s about *emotion and intuition.* It’s also about the *continual refreshing of my use of self by being reflective and putting myself through experiences to be more aware.* It’s about *dealing with the price of deep sensitivity and how I regulate my feelings and responses.* It’s about *holding the right energy to do the work.* Most of all *being systemic in my own sense of self as well building deep systemic meaning of the different systems that I might be working in and influencing.* It’s about my *ability to be strong and yet highly sensitive.*”

“*How I show up. Understanding my impact on the system, people and groups I am working with. Having a part of me that observes in real time how I affect the dynamic in the room. Understanding intersectionality and how my various identities appear to others and show up in my own behavior. Using what I understand and learn about these affects to help change my behaviour to be the most effective consultant partner I can be with my client.*”

“*Being deliberately conscious about how I make others feel through my behavior toward them. This includes the extent to which I am able shift my attitudes and behavior toward being more supportive of others at personal levels or in professional development situations. Disciplining my will in order to “let go” of the desire to satisfy my own ego needs in order to support the development of others is key to my effective use of self.*”

“*Looking after myself - healthy body, heart and mind, so that in showing up for work I am in the best shape I can be in order to do the work; I am centered and grounded so that I can differentiate between what is going on for others as opposed to what might be arising in me, and make informed decisions about what is best to do in service of the client.*”

“*My ability to bracket my own beliefs, feelings and opinions to enable me to work with a system in a way that is most valuable for them and not consciously or unconsciously steered by my own work.*”

“*Being very present and using my thoughts, feelings personality, past experience and education to disrupt or help the system learn or reflect.*”

APPENDICES

Appendix E – Personal Definition from Qualitative Data about Use of Self

“What is important in this discussion is understanding that *to use self I have to know myself well, know my hot buttons, know my limitations and strengths. I need to know the skills and approaches to use. I have to be able to assess the person, team, system I am entering. I have to know when to accept an engagement and when to refuse it or walk away. One of the things that disturbs me is encountering situations where consultants have worked with a client who were unaware of their behavior and its impact. You have to know that as soon as you say, “Hello,” you are beginning to change the person, team, system with whom you are engaging. There are no shortcuts to developing this type of self-knowledge and knowledge about others. It takes time, deep and critical reflection and a willingness to be vulnerable and admit you are not an expert.*”

“The use of my own *authenticity, voice, emotion, thinking, power, humor and vulnerability* to help myself or others achieve a desired outcome. This includes *intentionality around my interactions with others, when to speak, when not to speak, when to engage, when to listen and helping others use their voice and self.*”

“Use of Self means that *I immerse myself in the moment and pay attention to everything that is happening to me (mentally, bodily, emotionally) and happening in my environment and use all of that to determine what decisions I make and actions I take.*”

“Making sure that I *know as many parts of myself as possible and especially ...the ones that are likely to trip me up or get in my way in some way, the ones that are in shadow and the ones that help me really shine.*”

“*Doing my ‘own work’ with consistency and honesty so that it doesn’t show up with groups and contaminate/ overly shape the field that we are creating.*”

“Making sure I am attending to the basics of sleep and food etc so that I increase the chances of me being at my best”

“*Being grounded in myself- connecting with my head, heart and belly centre. Being present to self and other- whats between us- and the wider field. Trusting my embodied knowing. Staying curious- being ‘in the zone’, trusting my intuitive self and the Divine, tuning into energy paying attention ‘moment by moment’;, noticing when I/others get entangled- being with ‘what is’, rather than what should be; paying attention to power dynamics, my reactivity, feelings and triggers, what’s mine, what not mine, what belongs to the wider system, working with parallel process, systemic dynamics , its ‘all data’, tuning into my and others’ stories and how this shows up in the here and now”*

“*Using my skills and knowledge to make the most appropriate interventions for the situation; considering and reflecting on how my values, biases and motivations could be impacting my understanding and/or behaviours; this can be ‘in the moment’ and in planning. It’s about bringing the authenticity of ‘me’ to the table.*”

“*an attempt to enter the psychological space of the client and how they see the system, but also to place it into a conceptual context that allows the client and myself to have an orientation to the situation that leads to a productive line of action. In that sense the use of self represents a bringng of empathy (heart) in conjunction with ideas (mind.)*

Along the way other elements of the self are engaged including *intuition, courage, discipline, restraint, risk-taking, self-disclosure, and will to action.*”

“*Degree of how you use your Self Awareness, Self Concept, Self Esteem and your Social Self in the work you do as an OD practitioner.*”

APPENDICES

Appendix E – Personal Definition from Qualitative Data about Use of Self

“I think of it in a few different, but related ways. I think of it as *bringing all of my self - mind, heart, gut, body, professional self, emotional self, etc - in a way that recognises they are all present in me at all times and how I present in any moment is an interaction of those aspects*. Related to that I also think of it in terms of the *choices I make about how I let those aspects come through in service of the work, eg when I share vulnerability, when I model courage etc*. I also acknowledge that *when I am with a client I will influence and be influenced in that relationship*, which is why those informed choices are important. In summary, I guess it feels like *bringing my full humanity to the relationship with awareness in service of the client*.”

“How I use myself as an instrument of change. this requires me to understand myself and my impact on others, being choiceful on how I show up and being able to adjust with intent”

“paying attention to and/or being conscious of my whole being at any moment--thoughts, feelings, body sensations--and using that awareness to inform my intentions and guide my behavior in a way that helps me have more effective interactions with others.”

“I am a very important intervention point in the practice of OD - my presence, competencies, my personal world view and values, my own shadows and anxieties, my style and needs.”

“Who I am and how I affect others in my practice add another layer and dimension, color and life, to all the theories and concepts I apply and the intervention strategies I use.”

“How others affect me - clients, colleagues, friends - also affect how I interpret or construct my context and the contexts of my relationships and interaction with others in the practice”

“I take care of me as I care for my theories, strategies, tools and technology in the practice.”

“I value my own presence and contribution in the practice, as I am also discerning of my choices and how these will affect the other”



Dr. L. Mee-Yan Cheung-Judge BSc, MA, Ph.D.

Mee-Yan is a “**scholar-educator-practitioner**” in the field of Organisation Development. As a practitioner, she has worked over 30 years directly with a number of organisations across sectors, industry and global regions to deliver powerful transformational change, which is what she is known for. She led one of the world’s largest participatory change in BBC – involving 17,000 people to co-construct the future of BBC simultaneously ; she has led major cultural change in a number of global pharmaceutical, retail, energy, media organisations. Mee-Yan was the lead consultant to transform the state-owned multi-media organisation in United Arab Emirates over 24 months; for close to 5 years she was the senior international consultant to lead the State of Singapore in their nation-wide public service transformation programme (2012- 2017)

As an educator, she is a senior Fellow of Singapore Civil Service College. She is a “Distinguished-Scholar-Practitioner Guest faculty” in St Thomas University, and adjunct faculty in Bowling Green University in USA. She started the NTL OD Certificate programme for Europe and had been the Dean of the programme for over 11 years. She is currently dean of a global senior leaders’ integrated development programme on Leadership, Organisation Development and Spirituality for global faith-based organisations. She regularly teaches in Business Schools internationally. She started the European branch of Organisation Development Network and have been supporting the development of OD network in other countries. As a person committed to develop OD talents, she has made investment to Asian countries, especially to China to grow the capability of Asian OD practitioners as to how to do OD within its political context. She spoke in many conferences in Asia, Africa as well as in US and UK to promote interest in the field of OD.

As a scholar, Mee Yan authored many OD articles, book chapters and reports on the future of work, future of OD, future of OD education, and OD practices. Her book on What is OD? with Linda Holberhe has become a standard textbook globally in OD programme. Mee Yan co-led with Professor Jamieson this first piece of research ever on the core concept of OD – the USE OF SELF to 44 countries with 704 respondents. Mee Yan have been a member of the editorial board of the Journal of OD Practitioner (OD Review) since 2014.

Her contribution to the field of OD is recognised worldwide. She was the recipient of – **the Life Time Achievement Award** by ODN in 2013 and Richard Beckhard Award by IODA in 2016 for the recognition of her outstanding contribution to the field of OD globally. In July 2018, NTL named Mee Yan an Emeritus Member in recognition of her long and outstanding contribution towards the advancement of Applied Behavioural Science and NTL’s global contribution. In 2018, and in 2019 she also has received the Top Influential Thinker from HR magazine in UK.

Mee-Yan is passionate in advancing the role OD has in building healthy organisation and upholding civil society. She is committed to grow the talent pipeline of change agents among line leaders and HR/OD practitioners. Having taken medical sabbatical for over 20 months, Mee Yan is returning to work with greater clarity, passion and focus to take the field further in her next phase of work. People who knows her value her pragmatic, accessible, humorous and learners’ focus approach to teach and practice OD. She resides at Oxford, UK and you can contact her at Imycj@quality-equality.com



David W. Jamieson, Ph.D.

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He received his Ph.D. in Management from UCLA, majoring in Organization Design & Development and a BS in Business Administration from Drexel University, with a Behavioral Science minor.

Dave is co-author of *Managing Workforce 2000: Gaining the Diversity Advantage* (Jossey-Bass, 1991), co-author of *The Facilitator’s Fieldbook, 1st, 2nd, 3rd Edition* (AMACOM, 2012), co-author of *Consultation for Organizational Change* (IAP, 2010), *Consultation for Organizational Change, Revisited* (IAP, 2016), co-author of *Handbook for Strategic HR: Best Practices in Organization Development from the OD Network* (AMACOM, 2012) and co-author of *Enacting Values-Based Change: Organization Development in Action* (2018).

He has published 17 chapters and a few dozen articles. He was recently named Editor-in-Chief of the OD Review and Associate Editor, Journal of Management Inquiry. Additionally, he serves on 2 other editorial review boards: Journal of Applied Behavioral Sciences and Journal of Organization Change Management.

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