

**The Relationship between Membership Participation,  
Organisational Learning and Strategic Change in  
Democratically Structured Voluntary Organisations.**

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**Submitted for the Award of PhD**

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**Submitted to the Higher Education and Training Awards Council**

**May 2002**

## DECLARATION

I hereby certify that this material, which I now submit for assessment of the programme of study leading to the award of PhD, is entirely my own work and has not been taken from the work of others save and to the extent that such work has been cited and acknowledged within the text of my work.

Signed: Catherine Broadhead Date: 10<sup>th</sup> July 2002

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## **Abstract**

The study explores the relationship between the individual member and the voluntary, democratically structured organisation in terms of its impact on the organisation's ability to engage in effective strategic change in response to environmental challenges.

The study contributes to the understanding of the operation of these organisations within the context of the literature on organisational dynamics, behaviour and development. The study contributes to the development of a theoretical explanation of the management of strategic change and its relationship to membership participation within such organisations.

There is a particular focus on organisational learning as a process of continuous strategic change. This is because of the specific voluntary characteristics of membership participation within this organisational sector.

In addition to testing a number of hypotheses, the study proposes and tests an Input Output Analytical Model. It is envisaged that the model can be used as a diagnostic instrument to aid the development of membership participation, organisational learning and strategic change capabilities of voluntary, democratically structured organisations.

The multiple case study research methodology, involving three case studies, is utilised.

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During the last decade, Irish Government strategic policy has placed increased importance on the representative roles and responsive capacities of voluntary organisations in relation to various social constituencies. Examples include reports, policy and new legislation published by N.E.S.F. (1997), the Department of Health and Children (1994, 1996, 1998, 2000, 2001), the Department of Social, Community and Family Affairs (2000) and the Department of Education (2001). These capacities imply effective environmental connections.

Increasingly, the membership and clients of these organisations are demanding a direct voice in consultation in policy development and determining service provision. This is both within organisations and externally through new social partnership structures. This was, for example, a major theme in the Report of the Commission on the Status of People with Disabilities (1996) - and more recently in the public conflict regarding proposed legislation related to disability, special education and traveller halting sites.

In addition, Government and various statutory agencies see the voluntary sector as having particular abilities in terms of needs identification, responsiveness and innovation (Department of Health 1994, 1996, 1998, 2000, Department of Social, Community and Family Affairs 2000, Donoghue 2002). Voluntary sector innovative, responsive and representative capacities are also themes raised by the European Union in its recent communiqué (E.C. 1997). Faughnan and Kelleher (1992) have found, however, that related organisational capabilities are under developed among voluntary sector organisations. Similar issues arose in studies undertaken by Breathnach (1987, 1996) in relation to the operation of some youth work organisations and a trade union.

As will be demonstrated later in the literature review, all of these capacities are dependent on effective internal communication and analysis, and effective connections with 'need sources' at the boundaries of an organisation.

A core principle inherent in the structures of democratic voluntary organisations is the requirement to be representative of and responsive to key constituencies. In addition, these organisations are dependent on their memberships for their power and status, access to target groups and information held by them, effective governance and, at a fundamental level, the ability to achieve their mission. Yet, the membership of such organisations - as this core organisational resource - is committed to involvement only on a voluntary basis. The individual member has, to a very large extent, complete control over the decision to continue to engage.

The ongoing commitment of the member to the organisation is often dependent on what the member receives, what s/he is enabled to contribute, the sense of ownership or alienation the member experiences. In essence, it is dependent on the quality of the relationship that exists between the individual member and the 'organisation'. It is dependent on the degree to which the member is heard, engaged and positively motivated by the organisation (Breathnach 1987 and 1996, McCarthy 1991, Keher 1993).

As the membership is one of the key sources of environmental information and reflection for the organisation, and has particular importance in terms of the implementation of strategic action, an open and constructive relationship is equally important to the organisation. The relationship, therefore, impacts on the manner in which strategic change can be effectively addressed by a voluntary, democratically structured organisation (Breathnach 1996).

Given the voluntary nature of membership commitment in these instances, the approach to strategic change adopted has to contend with the issue of 'ownership' to a high degree. It is suggested here that this reality may make an approach based on the management of continuous change a necessity. This is in order to maintain participation, and to achieve its consequent contribution to the health and effectiveness of democratically structured voluntary organisations.

Discontinuous change is likely to undermine voluntary commitment since the concept of the 'ownership' of the change process by the voluntary membership is key. An approach based on continuous organisational learning may provide useful insight in this context as a means of enabling a strategic focus in relation to organisational change rather than a limited incremental and reactive one. At the heart of this discussion is the question: What is the type of communication and dialogue at the core of these processes that enables the attainment of mutual understanding, effective and strategic forward organisational movement, effective and mutually enabling relationships between the voluntary, democratically structured organisation and its individual members?

### **The Objectives of the Study**

This study explores the relationship between the individual member and the voluntary, democratically structured organisation in terms of its impact on the organisation's ability to engage in effective strategic change. The need and ability to, and the management of, change in organisations has been considered and debated to a significant degree in the literature on organisational development. The discussion to date has been mainly concerned with business organisations, State agencies to a lesser extent and voluntary organisations to an even lesser degree (Anheier 2001). Consideration of organisational change in democratically structured voluntary organisations appears to be under developed in the academic literature.

Within the literature on change management in general, and that related to organisational innovation and learning in particular, the manner in which organisational employees, other stakeholders and 'need sources' are engaged by and participate in an organisation has been identified as particularly significant. This relates both to identifying the need for change due to changing environmental conditions, and the importance of the effective inclusion of such stakeholders. This is in order to enable required developments. Resistance among such organisational actors has been demonstrated to impact on the success of organisational change initiatives. At a broader social level, the development of the concept of *social partnership* may be understood in this context.

The idea of '*participation*' has a particular resonance in the consideration of strategic change in voluntary democratically structured organisations, particularly in terms of the importance of the 'ownership' of change processes and objectives by organisation members. This relates to the need to maintain levels of commitment and involvement. Given that organisation members are the core organisational resource and source of power in these sorts of organisations, the issue is of particular significance.

The impact of organisational change on the ongoing commitment of members to voluntary, democratically structured organisations is, therefore, a crucial concern. The literature on organisational change has demonstrated that the commitment of employees to their organisation can be negatively affected by discontinuous and large-scale organisational change processes. This has been found in the context of business organisations where there is the option of sourcing new employees – even though this is at the expense of the capability of an organisation. It is likely then that the impact of such change on the voluntary commitment of members is an even more significant issue for democratically structured voluntary organisations. This suggests that a '*continuous change*' approach is required in this type of organisational context. Within the literature there has been debate regarding the value of a continuous change approach in enabling organisations (see for

example Dunphy and Stace 1990, Quinn 1986). Such an approach has been described as 'incremental'. In the main, criticisms relate to the lack of a 'strategic' approach inherent in incrementalism. It can be argued, however, that 'organisational learning' suggests a continuous change method akin to effective strategy development.

During the last decade, much of the consideration of organisational learning and the related idea of 'knowledge creation' in the literature has been concerned with the capturing of data and technical concerns related to data collection / information gathering. In more recent times, this literature has acknowledged the need to go beyond this and to look at the broader factors impacting on the ability to capture 'tacit' knowledge held by organisational actors. That is to suggest not simply the *information* they hold but their understanding of the information they hold. The need to engage in communal *reflection* and *conclusion drawing* has been identified as a significant organisational need in trying to achieve this. These are significant learning and development tasks at both organisational and individual levels.

The blocks to or inhibitors of the successful achievement of these tasks relate to issues of *organisational culture* – in terms both of its development and its impact. In particular, it relates to the impact of culture on the capability to include those with *diverse* perspectives and abilities, and the inevitable issues of *conflict* that arise. An earlier study by this researcher (Breathnach 1996) looking at the impact of culture on an organisational change initiative in a democratically structured voluntary organisation suggested useful research could be undertaken into whether non or under participation of members may be an indication of an *organisational learning and strategic dysfunction*. Similarly, Argyris (1999) has recently suggested that the issue of *the relationship between the individual and the organisation* in terms of its impact on organisational learning has been largely avoided in the literature on organisational learning. He suggested that this is a topic worthy of investigation.

Pascale (1989) identified two sets of organisational norms related to the development of organisational culture. He suggests that those related to social conventions – i.e. those concerned with relational processes – are less significant than others related to the mission and values of an organisation. This study suggests, however, that it is these norms that are central to the consideration of the learning (and therefore strategic change) capability of organisations (implying the enactment of all tasks in the strategic-learning cycle: action, reflection, conclusions drawing/ decision making, testing). They are central to the effectiveness of the relationship between an organisation and the individual member, and the organisational ability to engage in effective communal reflection and conclusion drawing. As has been suggested, the impact of these is of particular significance in democratically structured voluntary organisations due the high level of dependence that exists on organisational members – whether this is acknowledged by organisations, or indeed members, or not. The literature on change management in business organisations published recently indicates, however, that this relationship is of importance in organisations generally. This is discussed in the literature review. Therefore, democratically structured organisations provide a useful ‘laboratory’ to explore these relationships given the extent of their depth and importance in enabling the long-term survival of this type of organisation.

### **The Research Questions**

The study focuses on the relationship between the member and the voluntary, democratically structured organisation, and the dynamics of change management in such organisations. The study investigates the process by which organisation culture(s) is established and maintained in those organisations. The study looks at organisational initiatives addressing participation and learning difficulties that occur. The role of organisational norms of behaviour are explored in this context as are the specific change management issues involved. The study investigates the impact of these dynamics on the

level of membership participation, the learning, innovative and strategic change capabilities related to the strategic-learning tasks: action, reflection, conclusion drawing / decision making, testing) of voluntary, democratically structured organisations. The study asks a number of questions in these respects. These are as follows:

- Can the under or non-participation of certain groups of members in democratically structured voluntary organisations be understood as a symptom of an organisational (system) learning / strategic dysfunction?
- Can the process by which organisation culture is established and maintained provide an explanation for the existence and perpetuation of such participation difficulties and strategic learning dysfunction within these organisations?
- If organisational initiatives addressing these participation and strategic learning difficulties in these types of organisations are to succeed, does the focus of the initiative have to be change at a systemic organisational level rather than at a non / under participating individual member or group level only?
- To be successful, must these change initiatives address the effects of organisational culture on how and when the membership are involved in the organisational strategy development cycle particularly through its impact on:
  - Communication
  - Management of internal conflict / difference
  - Organisational leadership, representative and membership roles?
- In order for these change initiatives to be successful, must specific and congruent arrangements for the management of systemic change, and a timeframe for completion, be put in place by the organisation?



- In addition to increasing effective membership participation, will change initiatives of this type increase the learning and innovative capacities of voluntary, democratically structured organisations?

To enable the exploration of these questions, the study proposes and uses an Input Output Analytical Model. It is intended that once tested through this study it can be utilised and further tested in and by voluntary, democratically structured organisations as a diagnostic tool to enable their participation, organisational learning and strategic change capabilities (related to the effective implementation of the integrated tasks of the organisations' strategic-learning cycles: action, reflection, conclusion drawing / decision making, testing. This is central to the organisational effective engagement with changes and anticipated changes in its environment and the impact of this on the organisational ability to effectively implement its mission).

### **The Structure of the Study**

The study is structured in the following way. An introduction to the issues involved is provided in Chapter One. There is an exploration of the literature on the relationships between the member and organisation, organisation strategy and learning, change and innovation and the factors that impact on an organisation's ability to engage effectively in these. These are contained in Chapter Two. At the core of these considerations is the process of dialogue and 'communicative action' (Habermas 1987), and the learning (Argyris 1999) and political (Coopey 1995) relationship between the individual and the organisation. In particular, the following are discussed:

- The relationship between organisational strategy and organisational learning;
- Organisational processes related to strategy development and learning cycles;

- Experience and reflection and the importance of diversity;
- Conflict and its relationship to learning;
- Leadership and membership roles - their relationship to organisational learning and control;
- Organisational limitations to learning
  - organisational culture including social control systems, socialisation processes and the institutionalisation of power
  - organisational structures
  - learning dysfunction.

This provides the theoretical framework for the study - an essential element of case study research work (Yin 1994). A series of hypotheses emerging from this literature review is suggested. These are then structured as a three part Input Output Model of Analysis. This is described in Chapter Three. The model aims to enable the identification and analysis of the processes impacting on the development of strategic and learning capacities of voluntary democratically structured organisations and their relationship to patterns of member participation. This is in the context of the organisational environment and its ability to implement its mission effectively on an ongoing basis. The model provides the mechanism for 'explanation building' and pattern matching to theory within the study - the analytical strategy employed.

In order to test both the hypotheses and the model, a research methodology was required that allowed for the gathering and analysis of diverse sources of qualitative data over an extended time frame in varying organisational contexts. A multiple case study approach involving three case studies was adopted. The reasons for this choice are discussed and the methodology described in Chapter Four. Also described are the difficulties encountered in using the methodology.

The data analysis is included in the individual case study descriptions and analyses in Chapters Five, Six and Seven, and in the analytical overview in Chapter Eight. The process of analysis has a number of parts. Building on Pettigrew's (1985) and Yin's (1994) methodological approaches, each case study is individually analysed. This is first undertaken in terms of tracing the evolution of the pertinent themes identified in the hypotheses, and the 'Input Output' Model, during each stage of development of each organisation - i.e. membership participation, organisational learning, strategic change, and the factors impacting on these. This enables the patterns of participation, organisational learning and strategic change to emerge. Secondly, the connections between each pattern are analysed in the instance of each case study. The patterns of connection between membership participation, organisational learning, strategic change, and the factors impacting on these, are suggested with respect to each case study. A meta-analysis of the three case studies is then undertaken.

Whilst the primary focus of within the study is the internal dynamics within the organisations, this is at all times considered in the broader context of the impact of the external environmental on the organisations and the ability of the organisations to implement their missions effectively. The purpose of both the study and the model is to enable these organisations to contend effectively with these issues, influences and concerns to a greater extent.

The literature provides the basis for the analytical framework. No one study is the basis for comparison and analysis. The findings are compared with earlier studies in relation to the specific dimensions under discussion. This entails a process of pattern matching. This process was aided by the development and application of the Input Output Analytical Model proposed in the study.

The concluding chapter – Chapter Nine - summarises the findings, suggests conclusions and proposes avenues for further development and application of the study. It suggests that the model of analysis, or diagnostic tool, utilised could be used as an aid to the development of organisational learning and strategic change capabilities in democratically structured, voluntary organisations. In addition to seeking further testing through future research, the possible application of the approach in intra-organisational social partnership arrangements, and in community consultation processes, is also suggested. The chapter also suggests that further exploration of the multiple case study methodology with a view to developing it further as a tool in the analysis and comparison of organisational dynamics in large-scale organisational settings would be useful.

### **The Contribution of the Study**

This study seeks to make the following contribution. The study attempts to situate the research within an established body of theoretical literature. The theory utilised relates to strategic and organisational dynamics including organisational learning and knowledge creation. As such it seeks to extend this body of theory by applying it in an additional organisational context.

The utilisation of this theoretical framework seeks to contribute to increased integration of organisational theory regardless of the type of organisation involved (for example not business organisations or public sector agencies alone). It thus allows for new insights and perspectives to be developed across the boundaries of particular organisational sectors.

The approach adopted enables 'participation' to be considered as a key strategic issue rather than simply a 'rights' or 'social justice' issue. The use of this theoretical framework focuses on the importance of key, organisationally-strategic issues and priorities rather than those

of particular individuals or groups. This, therefore, provides the opportunity to fully engage senior management of organisations in its consideration, and to review approaches to equality initiatives in organisational contexts.

The study proposes and tests an Input Output Analytical Model that seeks to facilitate the development of membership participation, strategic and learning competencies within democratically structured voluntary organisations.

A working paper outlining the study has been published on the National College of Ireland web site (Breathnach 2002).

## **Chapter Two: Literature Review**

### **Summary of the Literature Review**

In order to make the study's theoretical framework, a summary of the main points arising in the literature review are provided in summary form. These are referenced fully in the main review.

The literature review discusses the relationship between the individual member and the organisation, and the impact of this relationship on the capacity of an organisation to learn and engage in strategic change. In so doing, the organisation is enabled to more effectively carry out its mission and contend with changes and challenges within its environment.

It discusses the nature of strategy development in terms of its relationship to an organisation's environment. It identifies the twin tasks of organisational control and organisational learning as being central to effective organisational strategy in the long term. This implies a process of continuous organisationally strategic change, reflexivity, to ensure an organisation is fully attuned to current and anticipated developments in its environment. The literature identifies the increasing importance of organisational learning in this process, given the increasing pace of change occurring in the 'competitive' environment. At the heart of these processes is effective communication and dialogue allowing for the inclusion of, and reflection on, diverse perspectives - relational processes.

The concept of a 'competitive environment' is considered in relation to voluntary organisations. This is interpreted as significant in terms of maintaining the relevance of an organisation's mission and operation - rather than in terms of direct profit making capacity and competitive market position as in the business world. Market position may also be an

issue for the type of organisation under discussion here, however, particularly in terms of fundraising capacity from private, commercial and State sources.

The review considers the dynamics of individual and organisational learning and dialogue, and factors impacting on the capacity to learn at both levels.

The review raises issues regarding strategic change for voluntary democratically structured organisations, particularly in terms of the importance of the 'ownership' of change processes and objectives by organisation members. This relates to the need to maintain levels of commitment and involvement. Given that organisation members are the core organisational resource and source of power in these sorts of organisations, this issue is of particular significance.

This review considers the dynamics of organisational participation and organisational culture and their impact on the development of organisational structures and procedures, formal and informal processes, and the strategic and learning capabilities of organisations. The potential impact of this process on the institutionalisation of the power of particular groups and the development of related organisational socialisation processes in insulating an organisation and its leadership from pertinent changes in its external environment are discussed. The process is shown to result in stunted and dysfunctional organisational strategy and learning capabilities - undermining the future survival of organisations.

A number of factors are identified in the review as having particular significance in enabling strategic change and organisational learning - and therefore strategic change on a continuous basis. These include the importance of valuing and including diverse perspectives in undertaking strategic tasks and the importance of appropriate conflict management and communication. In this respect, the review also identifies the need for the development of social networks and infrastructure, the need to focus on the articulation and establishment

of shared future vision and shared analysis of current situations - the change readiness of organisational members - as being of importance.

The significant role leadership plays in enabling these is specified. This is in terms of energising actions through motivating future visions, the creation of constructive contention through telling the 'truth' about current and future realities and visions. It includes empowering membership to participate and take responsibility in a supportive environment related to enabling organisational processes and structures, boundary spanning capabilities, and effective management of organisational transitions / change. Fundamental to all of these considerations is the development and maintenance of a supportive organisational culture encouraging effective reflection in addition to action and decision-making.

These issues have particular significance in democratically structured voluntary organisations. Such organisations need to engage in continuous strategic change. This is in order to avoid the dangers of discontinuous and large-scale change impacting on the voluntary commitment of members. Organisational learning provides such an approach and is akin to effective strategy development - as demonstrated in the comparison between organisational strategy cycles and learning cycles. The inherent tasks provide a continuous reflection and action agenda for such organisations to enable their innovative, responsive and representative capacities. Government has identified these capacities as being comparatively unique and valuable characteristics. The capacities are also implied in the basic structures and missions as being central to the existence of voluntary, democratically structured organisations.

The nature and development of organisational culture, and related dynamics of leadership, membership, conflict management and communication, are likely to impact on the ability of democratically structured voluntary organisations to engage in continuous organisational learning, and effective strategic change. The impact on the participation of the membership



in strategic learning processes and tasks is likely to be affected by the underlying culture and related dynamics as identified. Given the structures involved, the roles played by the membership in these processes are of particular significance.

In the literature, attention is drawn to the relationship of these factors to organisation governance, accountability and politics. This is an area where the literature on the learning organisations *per se* has been criticised for its lack of consideration. It is suggested here that 'politics' can play a central, positive role in organisational learning and strategic change depending on the organisational culture.

In summary, it can be suggested that there are a number of interconnected relational processes that impact on the effectiveness of the relationship between the individual member and the organisation's learning and strategic change capacities. These relate to communication, conflict and difference management in particular, and are reflected in the participation and leadership styles and roles within voluntary, democratically structured organisations. These themes are reflected in the study's hypotheses.

The literature identifies a number of central considerations relating to effective continuous strategic change and organisational learning. This includes the importance of approaching the matter on the basis of an integrated system. The approach is primarily concerned with a system of processes rather than structures - 'form follows function'.

The review establishes a 'chain of evidence' from the general literature on organisational dynamics related to these issues. By looking at the matter in this way, the review attempts to provide a rounded perspective in considering continuous strategic change / organisational learning and their relationship to the individual member of the organisation. It attempts to bring together the specific effects of various organisational dynamics impacting both positively and negatively on the strategic change capabilities of organisations in a

systemic manner. As such, a systems perspective is adopted in the development of the literature review.

A number of hypotheses are drawn from this review of literature to enable application of the theory to voluntary, democratically structured organisations. These are suggested as follows.

The under or non-participation of certain groups of members in democratically structured voluntary organisations can be understood as a symptom of an organisational (system) learning / strategic dysfunction. The process by which organisation cultures are established and maintained provides an explanation for the existence and perpetuation of such participation difficulties and strategic learning dysfunction within these organisations.

If organisational initiatives addressing these participation and strategic learning difficulties in these types of organisations are to succeed, the focus of the initiative must be change at a systemic organisational level rather than at a non / under participating individual member or group level only. To be successful, these change initiatives must address the effects of organisational culture on how and when the membership are involved in the organisational strategy development cycle particularly through its impact on:

- Communication
- Management of internal conflict / difference
- Organisational leadership, representative and membership roles.

In order for these change initiatives to be successful, specific and congruent arrangements for the management of systemic change, and a timeframe for its completion, must be put in place by the organisation. In addition to increasing effective membership participation, change initiatives of this type will increase the learning and innovative capacities of voluntary, democratically structured organisations.

These hypotheses, and the relational processes underlying them, can be structured as an Input Output Analytical Model that, having been tested in this study, they may be used as an aid to diagnosis enabling the strategic change and learning capacities of voluntary, democratically structured organisations. This relates to the effective engagement of organisations with their environments and the effective implementation of their missions. This model is discussed in the next chapter.

## **Introduction**

Irish Government strategic policy over the last decade has placed increased importance on the representative roles and responsive capacities of voluntary organisations in relation to various social constituencies - implying effective environmental engagement. Examples include reports, policy and new legislation published by N.E.S.F. (1997), the Department of Health and Children (1994, 1996, 1998, 2000, 2001), the Department of Social, Community and Family Affairs (2000) and the Department of Education (2001).

Increasingly, the membership and client groups of these organisations are demanding a direct voice in consultation in policy development and determining service provision, both within organisations and externally through new social partnership structures. This was, for example, a major theme in the Report of the Commission on the Status of People with Disabilities (1996) - and more recently in the public conflict regarding the Disability Bill (2002).

In addition, Government and various statutory agencies see the voluntary sector has having particular abilities in terms of needs identification, responsiveness and innovation (Department of Health 1994, 1996, 1998, 2000, Department of Social, Community and Family Affairs 2000, Donoghue 2002). Voluntary sector innovative, responsive and representative capacities are also themes raised by the European Union in its recent communiqué (E.C. 1997). Faughnan and Kelleher (1992) have found, however, that these organisational capabilities are under developed among voluntary sector organisations. Similar issues arose in studies undertaken by Breathnach (1987, 1996) in relation to the operation of some youth work organisations and a trade union.

As will be demonstrated later, all of these capacities are dependent on effective internal communication and analysis, and effective connections with 'need sources'/'environmental information sources' at the boundaries of an organisation.

A core principle inherent in the structures of democratic voluntary organisations is the requirement to be representative and responsive to key constituencies. In addition, these organisations are dependent on their memberships for their power and status, access to target groups and information held by them, effective governance and, at a fundamental level, the ability to achieve their mission. Yet, the membership of such organisations - as this core organisational resource - is committed to involvement only on a voluntary basis. The individual member has, to a very large extent, complete control over the decision to continue to engage.

The ongoing commitment of the member to the organisation is often dependent on what the member receives, what s/he is enabled to contribute, the sense of ownership or alienation the member experiences. In essence, it is dependent on the quality of the relationship that exists between the individual member and the 'organisation'. It is dependent on the degree to which the member is heard, engaged and positively motivated by the organisation (Breathnach 1987 and 1996, McCarthy 1991, Keher 1993).

As the membership is one of the key sources of environmental information and reflection for the organisation, and has particular importance in terms of the implementation of strategic action, an open and constructive relationship is equally important to the organisation. The nature of the relationship, therefore, impacts on the manner in which strategic change can be effectively addressed by a voluntary, democratically structured organisation (Breathnach 1996).

Two earlier studies (Breathnach 1987,1996) by this researcher indicated that relationships of this kind are not automatic within voluntary, democratically structured organisations. The latter study found that organisational culture(s) impacted on the effectiveness of organisational change projects within such an organisation. In particular, the study raised questions in relation to the impact of organisational culture(s) on the learning and strategic capabilities of these organisations. In its conclusion, the study questioned whether the under or non-participation of certain groups of members may be an indication of an organisational learning dysfunction - and therefore strategic dysfunction - within organisations structured on this basis. Such dysfunction may impact on an organisation's ability to engage in strategic change. The study suggested that further research into this area would be useful.

Given the voluntary nature of membership commitment in these instances, the approach to strategic change adopted has to contend with the issue of 'ownership' to a high degree. It is suggested here that this reality may make an approach based on the management of continuous change a necessity. This is in order to maintain participation, and to achieve its consequent contribution to the health and effectiveness of democratically structured voluntary organisations. The literature on organisational learning may provide useful insight in this context, as a means of enabling a strategic focus in relation to organisational change rather than a limited incremental and reactive one.

To look at the relationship between membership participation, strategic change and organisational learning requires, in the first instance, the definition of the component parts of the relationship. This literature review seeks to do this by addressing the following questions. What is the relationship between organisational strategy, learning and knowledge creation? What are their inherent processes and relationships? What organisational components or processes are required to enable organisational strategy, learning and innovation, and which act as blocks or inhibitors to development? What is membership

participation and how does this relate to the processes indicated above? At the heart of this review is the question: What is the type of communication and dialogue at the core of these processes that enables the attainment of mutual understanding allowing effective and strategic forward organisational movement, effective and mutually enabling relationships between the organisation and the individual members? It is only having attempted to answer these questions that it will be possible to identify and explore the dynamics of the relationship between membership participation, strategic change and organisational learning - and its impact on enabling innovation, responsiveness, representativeness and strategic change in democratically structured, voluntary organisations.

The discussion includes an exploration of:

- The relationship between diversity and innovation / development;
- Issues of conflict and conflict / difference management;
- Leadership and membership roles;
- Organisational culture including socialisation processes and the institutionalisation of power;
- The function and impact of organisational structures on learning;
- Approaches to learning which result in dysfunction;
- Accountability, governance and politics.

The literature on organisational learning and learning organisations is limited but evolving. Argyris (1999) has outlined the range of theoretical approaches that have developed in the consideration of 'organisational learning'. He has provided an overview of the literature in the fields of socio-technical systems, organisational strategy, production, economic development, systems dynamics, human resources and organisational culture. In particular, he refers to Schein's (1992) analysis and the links this author makes between organisational culture and the ideal of the learning organisation. Schein argues that in a world of extreme change, there is a requirement for organisations to learn better and faster which in turn

creates the need for a learning culture that functions as a perpetual learning system. Schein suggests that the creation and maintenance of this is the primary task of organisational leadership. He has, however, also indicated the complexity of the relationship between the individual and the collective in achieving 'learning' (Coutu 2002).

Argyris (1999) goes on to state, however, that the literature on the learning organisation is inattentive to the gaps identified by those commentators who are sceptical of the approach. He identifies these as relating to arguments that:

- The idea of organisational learning is contradictory, paradoxical or devoid of meaning;
- Organisational learning is not always, or even ever, beneficent;
- Question whether real world organisations do learn productively, and whether in principle and actuality they are capable of doing so.

These issues, he suggests, are dependent on the behavioural worlds of organisations that make for limited learning systems.

One of the main considerations that has emerged in the literature critical of the learning organisation has been the issue of resolving the dilemma of imparting intelligence and learning capabilities to a non-human entity as Kim (1993), for example, has discussed. Argyris (1999) proposes that much of the literature has avoided dealing with this by defining entities at relatively high levels of social aggregation thus avoiding the difficulties of bridging individual and organisational phenomena. He cites Burgelman (1994) particularly in this respect.

Argyris (1999) identifies a key issue in this debate as being the concept of 'inquiry'. He describes this as the intertwining of thought and action, carried out by individuals in



interaction with one another, on behalf of the organisation to which they belong, in ways that change the organisation's theories of action and become embedded in the organisation. Pettigrew (1985) makes similar observations in his consideration of research methodology focused on organisational change in I.C.I. It also relates to Habermas' (1987) analysis of the development of 'communicative action'.

This again raises the issues of representation and responsiveness. Argyris (1999) states that it is possible for individuals to think and act on behalf of an organisation because organisations are political entities. Collectives become organisational, he suggests, when they meet three constitutional capabilities. These are identified as:

- To make collective decisions
- To delegate authority for action carried out by individuals in the name of the collective
- To say who is and is not a member of the collective.

Argyris continues that it must therefore be possible to say that individuals can undertake learning processes (inquiry) on behalf of the organisation that produces learning outcomes in terms of organisational change (in order to better respond to challenges in the environment and to more effectively carry out the organisational mission). In other words, organisations can learn depending on their relationship with, and the role of, organisational members.

Understanding the nature of the relationship between the communal or collective entity and the individual collective member appears, therefore, central to understanding the dynamics of organisational learning and strategic change. This relates to the core exploration of this study - the relationships between membership participation, organisational learning and strategic change in voluntary, democratically structured organisations.

## **Communication, Dialogue and Action**

Habermas (1987) in his discussion of 'Communicative Action' provides some insight into this relationship. He states that language is established through a process of social interaction. As such it is inter-subjective. Where conflict of action between people exists, the resolution requires impartial consideration as people are generally concerned with their own interests. Habermas suggests that impartiality is essentially a moral standpoint. He sees this as a communal process - in order to recommend 'norms' in the general interest and to ensure these have a social force. 'Monological mock dialogue' cannot replace this.

The same commentator suggests that motives and ends are inter-subjective and are interpreted within the context of cultural tradition. Communicative action relies on co-operative process. Participants relate simultaneously to something in the objective, social and subjective worlds (dimensions of environment). The 'speaker' and the 'hearer' use the reference system of the three worlds as an interpretive framework within which they work out a common definition of their situation. Coming to an understanding, Habermas suggests, means that participants in the dialogue reach agreement regarding the validity of their communication. Agreement is the inter-subjective recognition of the validity of the claims of the 'speaker'.

The background to communication is framed by the definition of the situation. The need for mutual understanding is measured against this. Understanding must overlap to a sufficient extent in order to be successful. If commonality cannot be presupposed, those involved have to utilise strategic action to come to mutual understanding. This involves the common definition of the 'situation', or the requirement to negotiate a common definition.

Each new communication, Habermas states, is a test of commonality and is open, therefore, to modification. It is an evolutionary process. He goes on to say that situations are not sharply defined. A 'situation' is described as a segment of relevant 'lifeworld' context. This

is thrown into relief by themes articulated through goals and plans of action. These contexts are concentrically ordered and become increasingly anonymous and diffused as distance in time and space grows. There are, therefore, moveable horizons for those involved, pointing to the complexity of the 'lifeworld'. The 'action-situation' is the centre of the 'lifeworld'.

The 'lifeworld' is always present in terms of providing background as soon as the relevant context is brought into the situation. This demonstrates its importance. In this circumstance, Habermas (1987) suggests, it loses its unquestioned solidity. It can no longer be taken for granted. It is 'problematized'. Only the limited segments of the 'lifeworld' brought into the horizon of a situation constitute a moveable context of action towards the achievement of mutual understanding. It is only this area that is considered under the category of 'knowledge' as it has been subject to joint dialogical or reflective processes. This relates to the perspective adopted by Freire (1971).

What is communicative action, therefore? According to Habermas, it has two dimensions. The first is the realisation of aims. The second is the interpretation of a situation and achieving some agreement in this respect. Participants pursue plans co-operatively on the basis of shared definition of situations. The attainment of consensus can be a goal of the process.

Two risks are inherent in this. The first is the risk of failing to come to an understanding, and the second is the plan miscarrying and failure. Habermas notes that averting the first is necessary for the management of the latter. Action and the achievement of mastery of the 'situation' is, therefore, a cyclical process. The actor is simultaneously the initiator of accountable action and the product of tradition, the solidarity groups of which s/he is part, the socialisation and learning process to which s/he has been exposed. These latent forms of action require a concept of systemic interdependency.

Habermas has identified, how, within the development of society, legal norms have replaced pre-legal traditional morals to which legal norms formally had reference. Now, he suggests, the 'law' is generated from the needs of commerce and the chains of command suited to the media of communication – as opposed to the previously existing structures of communication. The impact of this type of social operation and contexts of action mean that those contexts traditionally oriented to mutual understanding are marginalized. The subsystems of the economy and the bureaucratic state administration are on one side and the private spheres of life (connected with family, neighbourhood, voluntary associations) as well as those of the public sphere related to the citizen are on the other. Senge (1990) echoes this in his discussion of the need to treat employees as whole and integrated people, rather than disjointed entities participating in the disparate worlds of work and the domestic sphere.

The formalisation of relations through these developments entails relational demarcation in decision-making processes. This can be understood as the development of formal organisation and of organisational roles. This formalisation can be used strategically in the operation of power and power relationships. It does not replace communicative action but it does dis-empower it. Communicative action as described above is no longer considered as valid grounds to allow the legitimate redefinition of situations - the achievement of shared and evolutionary understandings. Such situations are therefore stripped of 'lifeworld' contexts. The process is no longer directed at achieving consensus. There is fragmentation (Senge 1993).

Habermas (1987) suggested that the constitution of action contexts is no longer socially integrated. Social relations are separated from the identities of the actors involved. This prevents holistic interpretations coming into existence. Everyday communication is robbed of the power to synthesise and becomes fragmented. This echoes the issue raised by Kim

(1993) and reflected on by Argyris (1999) and others on the capacity of an organisation to learn – and the importance of the manner of engagement of organisational members in enabling organisational learning.

In ways, Lesser and Prusak (2001) have reflected on this issue from an organisational and communal perspective in their discussion of preserving knowledge in the face of uncertainty. They note the importance of social networks in enhancing the ability to create, share and use both individual and collective knowledge to improve organisational productivity, effectiveness and innovative capacity. Damage to such networks through downsizing and the reduction of 'slack' organisational time to allow people to 'think' impacts on the ability to learn, develop and create. The commentators describe this type of 'knowledge management' capacity as a strategic capability. It is, essentially, however, dependent on human rather than technical ability.

An exploration of how these issues relate to the internal organisational context, the resulting organisational dynamics and technicalities of their impact in terms of the effective implementation of the organisational mission and engagement with the external environment is necessary in order to develop an understanding of the particular dynamics of democratically structured voluntary organisations in terms of learning, strategic change and membership participation.

### **The Relationship between Organisational Strategy and Organisational Learning**

It could be suggested that organisational learning is the core organisational strategy process from which all other organisation plans, actions and responses originate.

The concept of strategy has been defined in a number of ways - as plan, ploy, perspective and so forth (Mintzberg 1987). Viewing the operation of an organisation from a long-term perspective, however, limits the usefulness of a number of these descriptions. Strategy as

pattern may be one of the more helpful concepts in this discussion. Andrews (1980) suggests that strategy can be understood as the pattern of decisions in an organisation that:

- determine and reveal objectives, purposes and goals;
- produces the principle policies and plans for achieving goals;
- defines the range of business to be pursued;
- defines the economic and human organisation to be adopted;
- defines the nature of the contribution it intends to make to its shareholders, employees and communities.

Mintzberg (1987) when addressing the idea of strategy as pattern adopts a slightly different approach. He suggests that this involves viewing strategy as a combination of a consciously developed plan and the behaviour that results. It is a stream of actions (Mintzberg and Waters 1982) resulting in consistency of behaviour, whether or not this was intended. Realised strategy, that is to say what actually happens, is a combination of both deliberate and emergent strategies. Mintzberg has also described strategy as a mediating force between an organisation and its environment - both internal and external. This perhaps reflects the idea of strategy being both a deliberate proactive and a reactive process simultaneously. It perhaps echoes Quinn (1986) in his discussion of logical incrementalism.

In the context of this discussion, it can be suggested that the role of strategy over an extended period is to provide ongoing guidance to an organisation in the achievement of its mission and resulting goals through the effective utilisation of resources and interaction with

its current and anticipated future environments. It is a process of dialogue (Pascale 1994), a dialectical process.

Pascale proposes that strategy is defined as all things necessary for the successful functioning of an organisation as an adaptive mechanism. Therefore, strategy, incremental or otherwise, enables the organisation to respond, to move, change and develop towards the effective achievement of its goals within the larger system or environment within which it exists. This concept of strategy implies, then, the effort to balance the attempt to control organisational action and to learn from it (Mintzberg 1987).

Porter (1979) suggests that knowledge of the environment, the underlying sources of competitive pressure, provides the groundwork for a strategic action agenda. It has been said that the changing environment and the pace of that change is altering the basis of 'competition' and therefore the nature of competitive strategy (Stalk et al 1992).

Competitive strategy in the past has been described as a war of position based on a static market that allows for a static strategy. That is to suggest one that is less concerned with learning and more concerned with control. The new situation, Stalk et al argue, is one where organisational strategy must become more a war of movement where success depends on the anticipation of market trends and the ability to respond quickly to changing needs / demands. In other words, strategy in the new environmental situation, characterised by the rapid speed of change, at its core is about the ability of the organisation to learn quickly and respond. In terms of change management, it might be said that whilst it is dialogical/ dialectical in approach, it is necessary that it is transformational rather than transactional or narrowly reactive.

Hines (1993) describes this process as a giant feedback loop which starts and ends with the consumer, and which involves every process of the value chain in between. He sees the linkages themselves between functions internally, and those between distinct but similar

value chains of suppliers and consumers externally, as sources of competitive advantage in the development of his Integrated Materials Value Pipeline. This differs from Porter's (1980) analysis that focuses on separate functions, a more structural approach. Hines has critiqued Porter's Value Chain. He suggests that Porter's model does not concede that customer satisfaction and not company profit should be the primary objective. This reflects the need to respond to the mission or needs which the organisation was established to address rather than only the well being and the maintenance of the organisation itself. It suggests that it is necessary to define the mission in broader and yet more specific terms than simply the making of profit - in the commercial world. This suggests viewing the strategies involved in a long-term rather than a short-term perspective by maintaining good relationships with satisfied customers for the long term rather than concentrating on making profit in the short-term.

Secondly, Porter's model is criticised on the basis of it being a divided network both in-company and externally. As such Porter's Value Chain does not adopt a complete systems view or approach. It is also structure rather than process oriented.

Stalk et al (1992) echo Hines (1993) in suggesting that the essence of strategy is not the structure of the company's products and markets but the dynamics of its behaviour. The goal, they believe, is to identify and develop the hard to imitate organisational capabilities that distinguish a company from its competitors in the eyes of the consumer - that is the processes that consistently provide superior value to the consumer. They suggest that capabilities-based organisations outperform on five dimensions. These are:

- speed in responding to market demands and incorporating new ideas;
- consistency in provision and response;
- acuity in seeing and anticipating needs / demands;
- agility in adapting simultaneously to different environments;



- innovation in generating new and combining existing ideas to generate new sources of value to the consumer.

Inherent in these factors is the ability to learn and internalise learning quickly and well.

Stalk et al differentiate between strategy based on capabilities and strategy based on competencies (Hamel and Prahalad 1992). The latter concentrate not on core processes but on technological and functional expertise at specific points along the value chain, a functional approach perhaps more akin to Porter's (1980). Hamel and Prahalad (1989) do suggest, however, when discussing strategic intent that competitiveness ultimately depends on the pace at which companies embed new advantages deep within the organisation rather than the stock of existing advantages at any given time. Again, this emphasises the issue of continuous learning, innovation and movement.

It might be proposed, therefore, that in competitive, constantly and rapidly changing environments, the ability of an organisation to learn and respond effectively to new learning - to innovate, to change - must be the central tenet of organisational strategy. The ability of an organisation to develop effective processes to enable this is intimately linked to its ability to survive and thrive into the future.

Dunphy and Stace (1990) have criticised the learning organisation / continuous innovation approach as being incrementalist on the basis that it is evolutionary and therefore only suitable for stable environments. They say it is dependent on the competency of managers and their ability to access information on the environment and likely future. The key issue is, perhaps, that innovative, learning organisations do have this capability or seek to build it. Kiernan (1993) has described these organisations as learning organisations involved in continuous innovation. Such organisations have organised their internal processes to constantly interact with the environment. They are, in effect, 'listening' organisations.

This enables them to cope with a constantly changing environment so that massive, sudden, discontinuous change is not required of them.

Organisations that wait until there is a crisis are forced to change dramatically and completely within a short space of time. As Nadler and Tushman (1986) have identified, this leaves such organisations open to greatly increased risks. The requirement to do this regularly would, it could be suggested, undermine the strength of the organisation. Such an organisation would be involved in a process of continuous change without building it into an organisational strength of continuous innovation. The organisation would also need to have significant levels of control over core organisational resources in order to bring about regular change in this context if it were not to put the survival of the organisation at increased risk.

It can be said, therefore, that organisational learning is a key strategic process from which other strategic processes result (Andrews 1980, Mintzberg 1987). Strategy is reflected in the pattern of decisions that direct the operation of the organisation. These reflect a stream of actions that demonstrate both deliberate (i.e. planned) and emergent (i.e. reactive) strategies (Mintzberg 1987, Mintzberg and Waters 1982, Maletz and Nohira 2001). Mintzberg and Westley (2001) and Carroll and Hatakensaka (2001) identify how effective decision making and crisis management responds to the complexity and fluidity of a situation through the level of interactive responsiveness engaged in - as opposed to making decisions on the sole basis of predetermined analysis and diagnosis.

In this way, strategy can be understood as a mediator between the organisation and its environment. It can be described as a process of adaptation to the environment and as a dialogical process, a process of reflexivity (Giddens 1994). As such it is a balancing process between maintaining organisational control and learning (Mintzberg 1987, Quinn 1986, Pascale 1994).

Knowledge of the environment, as the source of competitive pressure, creates the strategic action agenda for an organisation. An increased pace of environmental change alters the basis of competition for an organisation. While the issue of competition may not seem of significance to voluntary organisations, in fact, the concept has use. Voluntary organisations must remain relevant in terms of their mission and operation. This may not be for the purpose of profit generation as in business, but it is, none the less, a similar issue in terms of achieving its reason for existence. For many such organisations, remaining relevant is also of significance in terms of income generation from public donations, sponsorship and State funding.

This increased pace of environmental change alters the balance between the need to control organisational action and learning. In such circumstances, organisations need to develop a learning competency such that they can learn quickly and respond to change (Porter 1979, Stalk et al 1992, Giddens 1994).

The goal for organisations, therefore, is to develop hard to imitate competencies, particularly related to receiving feedback from customers through integrated organisational processes. Linkages between organisational functions are central to this. The approach relates to what the organisation perceives as its core objectives and timeframes for achieving them. The development and maintenance of good relationships, and of having a 'systems' perspective, is significant (Hines 1993, Stalk et al 1992).

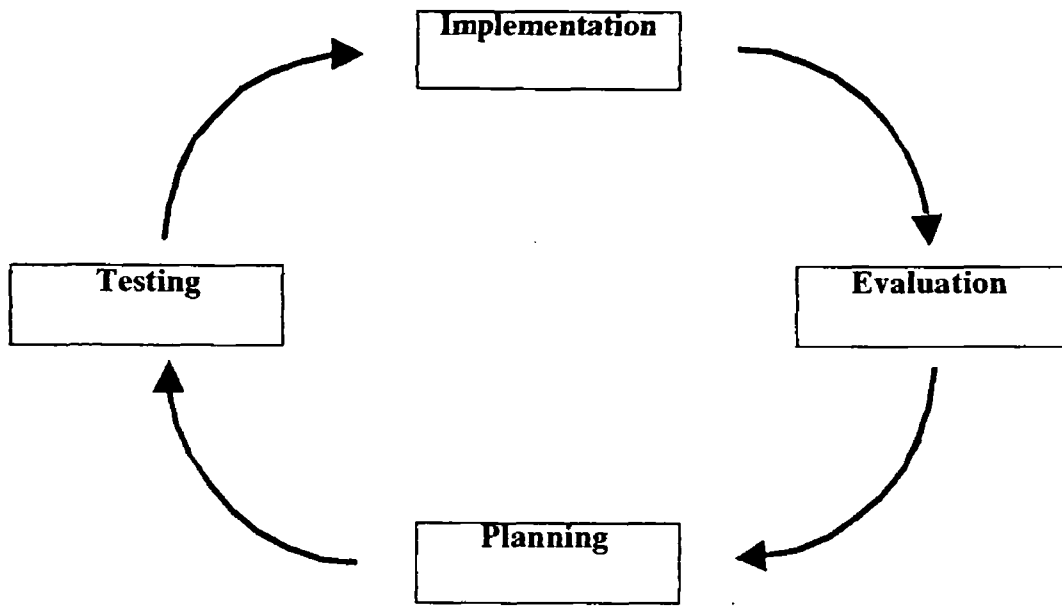
As has been suggested above, there is continuing debate in the literature regarding the importance of organisational processes versus functions in achieving competitiveness. This is also reflected in debate regarding the relevance of engaging in incremental approaches to change and developing learning competencies enabling continuous change (Porter 1980, Quinn 1986, Hamel and Prahalad 1989, Dunphy and Stace 1990, Senge 1990, Stalk et al 1992 Hines 1993, Kiernan 1993, Swan and Scarbrough 2001).

The dangers of waiting for crises to occur in order to engage in required organisational transformation have been identified. Similarly, the negative impact of continually engaging in large-scale discontinuous change, particularly on the willingness of the human resources of an organisation to engage, has been noted within business organisations (Nadler and Tushman 1986, Abrahamson 2000, Gadish and Gilbert 2001). This has significance for voluntary, democratically structured organisations as suggested earlier.

### **Organisational Processes related to Strategy Development, Learning and Knowledge Creation**

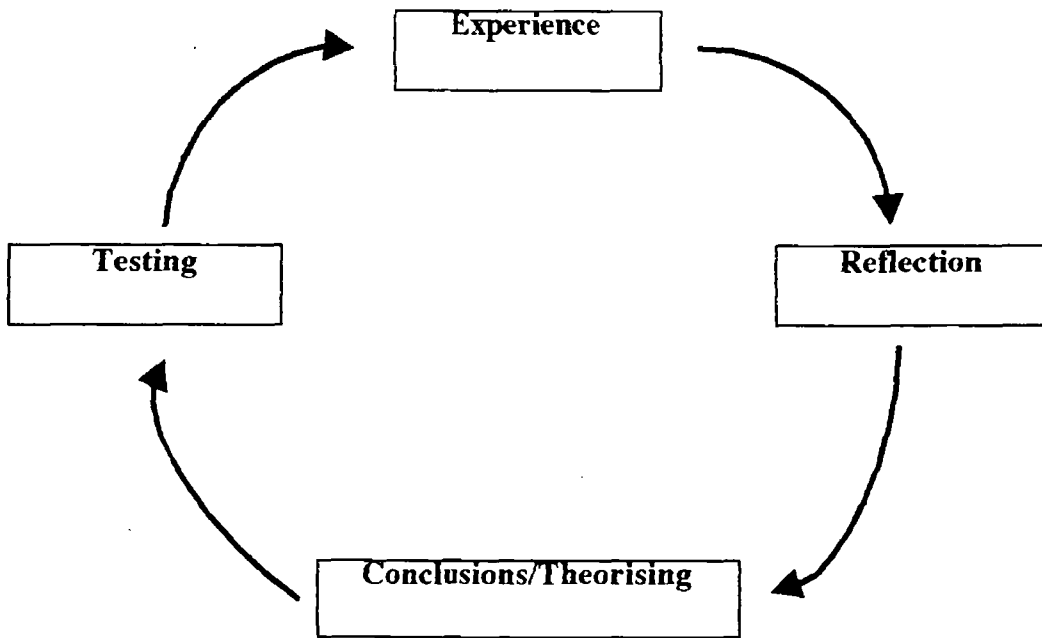
The organisational strategy development and learning have many similarities in terms of the sets of tasks involved. They can also both be viewed as cyclical processes (Kolb 1984, Quinn 1986, Dunphy and Stace 1990, Dixon 1994, Thompson et al 1995). In general terms, these involve action, reflection / analysis/ evaluation, drawing conclusions/ theorising / planning, testing (see Exhibits 1, 2, 3, 4 5).

**Exhibit 1 The Strategy Cycle**



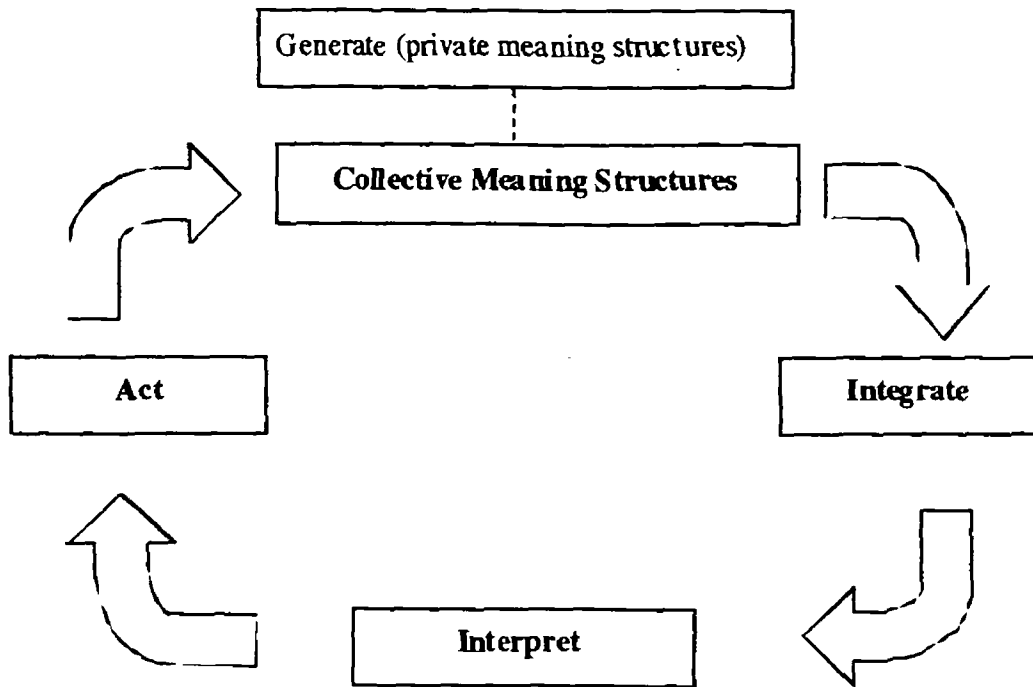
*Source: Thompson & Strickland 1995*

**Exhibit 2 Kolb's Learning Cycle**



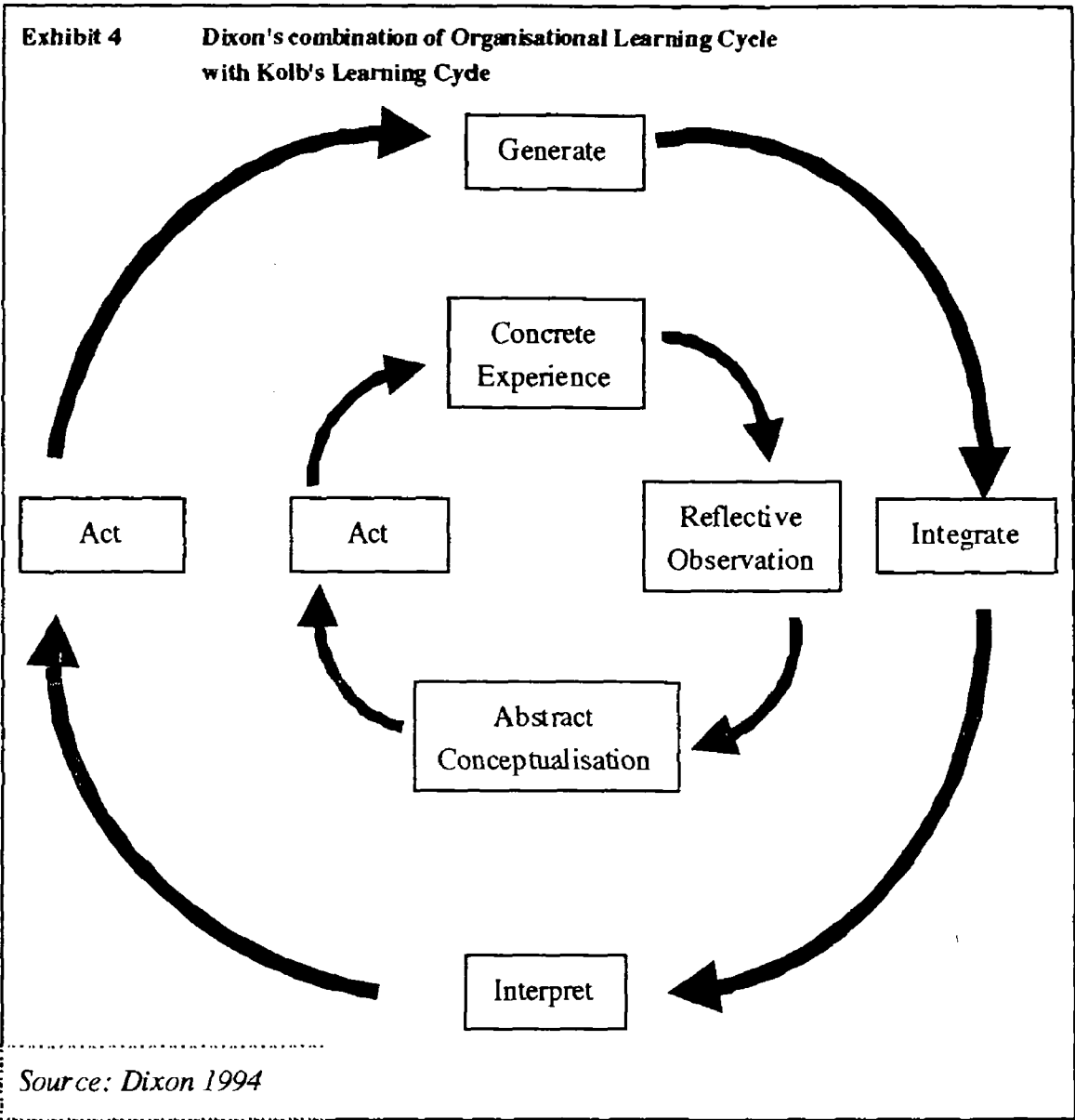
*Source : Kolb 1984*

**Exhibit 3 Organisaional Learning Cycle**



*Source : Dixon 1994*

Learning cycles at an individual level enable the development of personal meaning structures and 'world views' (Mezirow 1990). This process can be extended to the organisational level and the development of collective meaning structures (Dixon 1994, Nonanko and Kohono 1998). It can be further extended to encompass a cycle or framework of inquiry to include, in addition to the above tasks, interaction between organisational units, content, process and premise as focus for reflection (Coghlan and Brannick 2001 : See Exhibit 6). This relates to dimensions of culture creation and the levels of diversity impacting on the experience of individuals and groups.



Nonanko and Kohono (1998) emphasise the importance of knowledge creating teams / projects as places of reflection where value creation occurs through interactions within groups. This relates to the need for 'thinking' time as identified by Lesser and Prusak (2001). Through these processes the individuals participating realise themselves as integral parts of the environment. Nonanko and Kohono suggest that this can exist at many levels in an organisation: self, team, organisation and the broader environment. The process of

reflection and knowledge generation is amplified when each place of reflection joins together with others to form ever-greater reflective space. It, therefore, appears to signify the nature of organisation as a mechanism for the gathering of and reflection on, at deeper and greater levels, the experiences available to it. The impact of organisational culture on enabling organisation members to take time to 'reflect' rather than only engage in frantic activity is an issue identified by Bruch and Ghoshal (2002).

**Exhibit 5: Comparison of Kolb, Dixon Learning Cycles and Strategy Cycle**

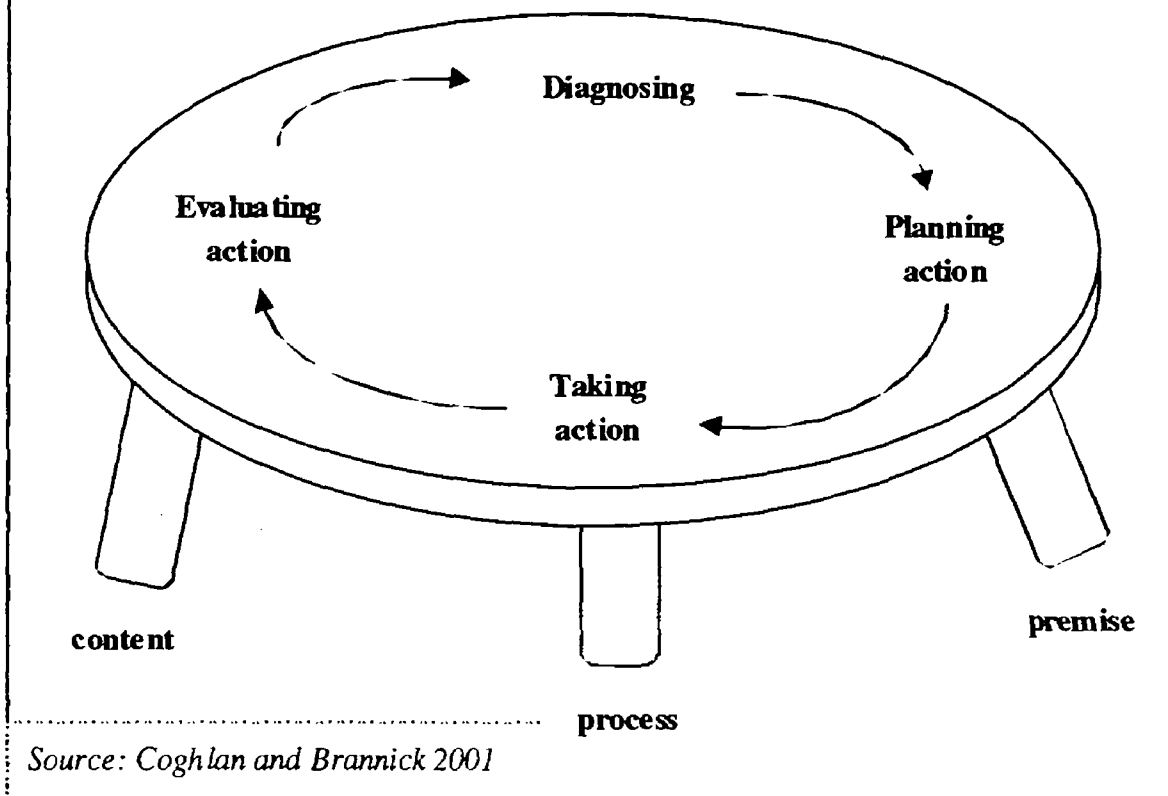
<b>Strategy Cycle</b>	<b>Kolb</b>	<b>Dixon</b>
Implementation	Experience	Generate individual meaning structures
Evaluation	Reflection	Integrate the variety of individual meaning structures
Planning	Theorising/ Drawing Conclusions	Interpreting
Testing	Testing	Acting



Significant differences in perspective have developed in the literature in this discussion. Brown and Duguid (1998), and Swan and Scarbrough (2001), have identified these. They note the differences between those commentators that emphasise knowledge capture and codification through the introduction of information technology, and those that focus on knowledge creation and sharing through social interaction - for example through the development of 'social networks' and 'communities of practice' (Brown and Duguid 1998, Lesser and Prusak 2001). This reflects an issue identified by Ward and Griffiths (1999) as requiring examination. That is the impact of informal organisational processes by which people undertake their responsibilities and inter-relationships related to knowledge management, creation and sharing.

Some research has found that much of the knowledge-based work in contemporary organisations is based on a diverse range of tacit social competencies - or 'emotional labour' as it has been described - held by individual workers at an individual level (Thompson, Warhurst and Callaghan 2001). Coghlan and Brannick (2001) have considered these dynamics in their discussion of the work of Chisholm (1998). They suggest that action research is essential for engaging in network development. It contributes to planning, action and learning processes - essentially social and reflective processes that engage individuals in communal knowledge creation and sharing.

**Exhibit 6**    **Meta cycle of enquiry**



It has been suggested that for much of the 1990s discussion has mainly focused on a 'functionalist' understanding of knowledge (Swan and Scarbrough 2001). Lanzara and Patriotta (2001), however, adopted a phenomenological approach highlighting the interactive, provisional, controversial and contested nature of knowledge. In other words, they consider 'knowledge' in terms of *process* engaged in continuous development - rather than as a static commodity. Their discussion involving the introduction of new technologies to particular work situations relates to issues of the institutionalisation of knowledge and its relationship to organisational culture, related behaviours and frameworks of understanding. This is discussed later.

Lanzara and Patriotta (2001) conclude that the effectiveness of knowledge management involves making the activity a reflective process. This, they suggest, involves two particular elements. The first is the need to recognise the limitations of practice and the limits of the management of heuristic knowledge - which depends on the experiences, motivations, social relations and perceptual skills of individuals. This reflects the work of Senge (1990), Mezirow (1991), Argyris (1991) and Healy (1998). Secondly, Lanzara and Patriotta (2001) suggest that knowledge management requires not only practical mastery of a phenomenon, but also a 'quasi-theoretical' understanding of it. This appears to relate to the learning task of drawing conclusions as identified above (Lewin 1954, Kolb 1984, Dixon 1994).

### **Experience and Reflection: The Importance of Diversity**

It is suggested in the literature (Nonanko and Kohomo 1998, Coghlan and Brannick 2001, Raelin 2001) that organisational creativity may be enabled by the tacit knowledge of individuals being made explicit and shared - thus creating new knowledge. This process is differentiated from information gathering by the process of reflection occurring in knowledge creation. The integrative function of reflection has been described. The manner in which an organisation operates can enable personal and group reflective processes, and this can be a primary function of organisations.

The point has also been made that knowledge creation processes must be inclusive of different 'mind sets' and political interests, the experience of a variety of people working together, the process of interpreting a variety of experiences and acting together. This is to ensure the effectiveness of shared knowledge creation processes (Chisholm 1998, Coghlan and Brannick 2001, Druskat and Wolff 2001, Maletz and Nohira 2001). These mind sets and frameworks of understanding are influenced by individual experience, expectations and culture (Mezirow 1991). Again this relates to issues of organisational culture.

In the business context at least, it has been suggested that effective learning and innovation systems have a number of specific characteristics and competencies relating to the gathering of information from diverse sources, and the engagement of multiple actors in the analysis of that data.

The importance of feedback to the organisation from the environment on the development of organisation activities, idea generation and the development of corporate culture has also been identified (Nadler and Tushman 1986, Kanter 1988, Stalk et al 1992, Hines 1993, Kiernan 1993). It has been noted that direct contact by the organisation with its environment is required in order to generate organisational concern and action (Nadler and Tushman 1986, Kanter 1988).

The importance of the existence of informal communication networks and relationships to innovation has been identified (Nadler and Tushman 1986, Kanter 1988, Kiernan 1993, Bonbeau and Meyer 2001, Hansen and Von Oetinger 2001, Lesser and Prusak 2001). They have been found to be more effective than bureaucratic procedures. Diverse sources of information are also required. To be innovative, there is a need for effective tools to be developed to enable benchmarking of best practice with any relevant source, performance measurement, job rotations and other similar initiatives. There is a need to effectively train and utilise 'front line troops' to access and use feedback from the environment, leadership to be cultivated at all organisational levels and T-shaped knowledge management.

It has been demonstrated that idea generation is aided by structural integration based on common goals rather than common functions (Kanter 1988; Stalk et al 1992). A dynamic model is needed to connect the major tasks of the innovation process to structural arrangements and social partners that facilitate them.

Kieman (1993) suggests that this is achieved through:

- The establishment of self-managing, interdisciplinary teams;
- The provision of accurate and timely financial and performance data to everyone;
- The provision of training to staff to interpret information and understand links between the individual and corporate performance.

It has been said that this process is aided by designing broad jobs as the broader range of skills and tasks undertaken increase the focus on results as opposed to rules. Perspectives are enlarged where roles overlap (Kanter 1988). This is echoed by Kieman (1993) when he states that small, flat, interdisciplinary teams where diversity is valued are necessary as is the minimum of bureaucracy and hierarchy. A number of additional factors required to enable the development of the learning capability of an organisation have been identified (Kieman 1993, Davenport et al 2001, Lesser and Prusak 2001). These include organisation culture which values continuous improvement, enables innovation from everybody, embraces change rather than fears it or tries to minimise it. Also required are mind-set and organisation structures that encourage cross-disciplinary teamwork, collaboration to enable learning, interdepartmental barriers demolished, and outer boundaries radically redefined.

Brusoni and Principe (2001) have stated in this respect that the key management task in knowledge creation is the definition of boundaries of the organisation. The critical issue, they suggest, is the extent to which the developmental dynamics of knowledge, product and organisation differ in terms both of time frames and innovation. The key to resolution that they propose involves moving from focusing on types of innovation to the characteristics of the processes involved. This reflects the work of Hines (1993). Brusoni and Principe (2001) state that organisations cope with the tensions between the different dynamics of change through the development of loosely coupled co-ordination arrangements based on inter-organisational networks. These provide the necessary flexibility to accommodate conflicting rates of change. The approach is dependent on a 'systems integrator' at the

centre who is the problem solver of last resort - who retains a deep understanding of the linkages between different components. This reflects the role of the Executive Board in learning organisations according to Garratt (2000).

Becker (2001) has suggested, however, that a networking approach can be a problem for organisational management - due to the dispersed nature of organisational knowledge. He identifies the key issue in this as being the reality that organisational action involves a large number of disparate actors and contexts. This makes the achievement of a synoptic view difficult. The various actors develop varying interpretative frameworks, as indicated by Habermas (1987). This impacts on communication and dialogue. The organisational ability to make effective decisions is reduced when the decision-makers lack a full understanding of the 'knowledge-base', and therefore of the organisation's 'knowledge needs'. This is an issue reflected on by Drucker (2002).

Research has demonstrated that lack of diversity, and the dominance of conformity to the status quo, have negative impacts on group analytical processes, decision-making, strategic action and capabilities (Janis 1982, Thomas et al 1990 and 1994). When group processes are effectively managed, the reverse has been shown to be the case (Vroom and Jago 1988, Kanter 1988, Hamel and Prahalahad 1992, Tjosvold 1995, Hansen and Von Oetinger 2001). Pelled et al (1999) found, however, that while diversity in work groups contributed to emotional conflict, it did not impact on the performance of those working groups. This may relate to the nature of the work undertaken - that is to say, the conflicting attributes may not be of significance in undertaking particular work.

Becker (2001) has suggested five management strategies for coping with dispersed organisational knowledge. The suggested strategies include substituting knowledge with access to knowledge - that is enabling groups and individuals to be connected so that their respective knowledge is at least identified, if not shared. Becker also suggests 'gap-filling'

approaches to deal with incomplete knowledge through the tacit use of 'repair skills' to cope with missing knowledge. He also suggests the design of 'market' and 'hierarchical' co-ordination mechanisms. The fourth strategy proposes the decomposition of organisational units into smaller sub-units that encourage the transmission of knowledge, in addition to aiding dispersal. Finally, he suggests strategies to increase the information available to decision-makers. He recognises that this in itself could create more difficulties given that issues of quality and quantity are involved. It can also be said that his perspective does not contend with the issue of 'information' versus 'knowledge' - the latter resulting from reflective practice.

### **Conflict and Difference: Its Relationship to Learning**

Given the importance of including diversity in the information gathering and reflection on information to enable learning and innovation, conflict is likely. Conflict and difference management is, therefore, of importance in this context.

The literature suggests that it is important to concentrate on differences of significance, particularly those that impact on the quality of interaction. It has been stated that it is naïve to pursue fake consensus based on artificial conformity (Motashabi 1993, Du Troit 1998). While Pelled et al (1999) found that racial and tenure attributes contributed to heated exchanges in groups and the development of emotional conflict, Jenn et al (1999) found that diversity of values held by group members can have significant effects on performance. Such diversity can make groups less effective and efficient, as well as causing group members to suffer lower levels of morale.

It has been shown that there is a need to establish and nurture effective and sustainable relationships (Hines 1993, Gilchrist 1998). Research has demonstrated that the conflict situation itself impacts on the achievement of best performance, communication, the processing of information and problem solving. Cultural differences in particular have an

effect on the occurrence and resolution of conflict (Pondy 1967, Deutsch 1969 and 1994, Steisleder et al 1980, White 1984, Tannen 1994, Carnevale et al 1998, Druskat and Wolff 2001). Cultural norms can dictate the use of adversarial approaches to conflict or ones based on constructive contention (Senge 1990, Kiernan 1994, Argyris 1999), for example.

Constructive contention has been described as the process whereby tensions may be used as a source of dynamism (Nadler and Tushman 1986, Thomas et al 1990 Argyris 1991, Streble 1994, Kiernan 1993). This process requires effective management in order to avoid paralysis of an organisation (Zalenik 1990, Tjosvold 1995). Similarly, formal, highly structured procedures can cause difficulties (Gilchrist 1998).

To be effective, constructive contention requires:

- Continual critical re-examination of assumptions deadening environmental scanning and creativity;
- The fostering of strong and constructive levels of debate by management;
- Divergent opinion being actively sought and considered seriously;
- Closure within reasonable time frames

(Argyris 1991, Tjosvold 1995).

It has been suggested that conflict resolution requires 'safe' opportunities for those from divergent backgrounds to enable the development of relationships through non-contentious work and meetings. This should enable the development of relationships around shared aspirations - often described as the development of social infrastructure or social networking. These opportunities should facilitate differentiation and integration, and assert shared values of solidarity and diversity. This is to enable the development of a shared agenda and culture drawing on many 'world-views' ( Mezirow 1991, Gilchrist 1998, Du Toit 1998, Brown et al 1998, Coghlan and Brannick 2001). In many ways, this reflects Jenn et al's (1999) findings.



Strategies for conflict resolution must be based on the establishment and nurturing of relationships which are authentic, holistic and sustainable (Gilchrist 1998). This obviously relates to the manner in which people relate to and communicate with one another. The conflict situation itself has been shown to prevent those involved communicating their concerns (Deutsch 1969 & 1994, Steisleder et al 1980, White 1984). These can be affected by the, often, unconscious cultural differences which exist including the manner in which different cultures deal with conflict itself as suggested earlier.

Co-operation and conflict can alter the way in which individuals process cognitive material. Expectations of conflict can reduce general problem solving abilities. Conflict produces restricted categorisations and, to a lesser degree, co-operation produces expanded ones. Concepts of co-operation and conflict may prime cognition that affect later cognitive behaviour, independent of the actual variables of the behaviour. Individual differences in social values orientation play an important moderating role and personal situation interactions should be taken into account when examining cognitive processes in social conflict (Carnevale et al 1998).

Du Toit (1998), in her discussion of building cultural synergy, states that the role of facilitators in working with communities is to find and understand each other. They should do this by accepting cultural differences and by focusing on similarities - as well as by negotiating a shared agenda that may lead to a sense of shared purpose. The collective challenge, she suggests, is not what to do but what to be. The key strategic challenge for communities is to appreciate who they are in order to discover what they can become. This echoes Senge (1990) in saying that learning occurs by telling the truth about the present and identifying a motivating vision for the future.

This implies a process, according to Du Toit, in which people negotiate and define a set of symbols which transcends and incorporates particular cultures in order to create a larger whole - a process fundamental to the notion of synergy. The construction of an inclusive culture implies some knowledge of all cultures of the members of the group. Therefore, as part of the process, these should be studied by all so each can be enabled to share the other's world and the symbols that underlie the others life. This reflects the earlier discussion of Habermas (1987) relating to communicative action. A re-evaluation of the assumptions underlying disparate value systems is required in a non-judgemental manner. The structures to be created should draw from many world-views and provide a comfortable milieu for all members.

Gilchirst (1998) encompasses much of this approach in the twelve steps in conflict resolution that she has outlined:

- Recognition: Awareness of the conflict as a problem and a shared desire to change the situation;
- Tolerance: Parties accept and tolerate each other's existence, acknowledging that they all have some rights and responsibilities in dealing with issues arising from the conflict;
- Information Exchange: Communication is established between the parties allowing them to exchange information and develop knowledge of each other;
- Dialogue: Parties enter into discussion, learning about their different experiences and grievances in relation to the conflict. Dialogue allows analysis but not necessarily consensus;

- **Empathy:** At a personal level, individuals from different sides of conflict begin to understand each other's perspectives and to empathise with one another;
- **Mediation:** Through further discussion or possibly mediated by an 'outsider', areas of agreement are highlighted which address common concerns and identify shared values;
- **Shared commitment:** A joint vision of how conflict could be resolved is developed, probably achieved through some compromises and re-framing of the problems;
- **Negotiations:** Agreement on limited objectives emerges after negotiation and co-operation around these is developed;
- **Trust:** The experience of working together consolidates personal relationships and organisational procedures based on mutual trust and respect;
- **Coalitions:** More formal arrangements are set up to promote partnership and create mechanisms for dealing with tensions and difficulties that have arisen from conflicting interests and view points;
- **Alliances:** These are formed around a range of issues which cross the barriers of the original conflict. There is progressive integration and development of informal networks;

- **Resolution and justice:** Reconciliation and peaceful co-existence is achieved based on a just and equitable solution to the conflict. Antagonistic identities fade away and a new sense of community emerges.

It can be seen that this is essentially a process of creating a consciously shared and developed culture building on the diverse experiences of those involved.

### **Leadership and Membership and their Relationship to Organisational Learning and Control**

It has been suggested that organisational learning will replace control as the dominant responsibility of leadership (Schein 1992). The need for agreed organisational processes rather than rules in maintaining control, and the need for effective feedback from the environment, are of particular importance in this context. This has implications for the nature of leadership, who has it and how it is used (Kiernan 1993) in terms of access to the environment and reflection on those experiences as discussed above. Essentially, this is the reverse of the situation in more traditional bureaucratic organisations (Dixon 1994, Senge 1990, Bonbeau and Meyer 2001). This also may have implications for the role of 'representative' in democratically structured organisations.

Dixon (1994) describes traditional leadership as the 'Superman' approach where the leader collects information, analyses it and tells others about it and what it means. The information subordinates have is seen as the valuable commodity rather than their analysis or reflection on it. The one right answer or way of proceeding, arrived at and issued by the leader, is seen as 'fact'. It is not seen simply as one interpretation. Subordinates are required to learn, not leaders. The communication process is therefore largely in one

direction - downwards. This approach ensures that diversity is organised out of the process. Senge (1990) critiques dominant forms of organisational leadership as being rooted in individualistic and non-systemic worldviews. It also reflects Healy's (1998) perspective and Habermas' (1987) analysis discussed earlier. To some extent this represents Goleman's (2000) explanation for limited 'leadership repertoires' held by many organisational managers. Leaders are perceived as heroes. The focus is on short-term events and charisma rather than on systemic forces and collective learning.

Dixon (1994) believes that in an organisation concerned with learning, the role of leader - and member - needs to be radically redefined. Such learning acts to lessen the conventional power and attributed wisdom of the leader. This implies that the leader's ideas should be challenged and tested through rational thought processes of organisation members rather than accepted unquestioningly by them because of the origin of the ideas at a higher level of the organisation. The same would probably be true in terms of the rejection of ideas for similar reasons and without proper consideration.

Leadership in a learning organisation therefore requires particular egalitarian values and skills that facilitate dialogue, enable knowledge creation, the development of shared contexts, depersonalises conflict and develops understanding among organisational members of the processes involved. In particular, leaders in learning organisations need to have a sensitivity towards 'people issues' and 'emotional intelligence' (Fahey et al 1998, Leonard et al 1998, Van Kogh 1998).

The primary role of leadership in this context is therefore a supervisory one in the process of finding leverage in jointly establishing directions / goals. This requires the leader(s) to have skills that facilitate organisational dialogue. This is to enable individuals who generate data to be involved in its interpretation within a common understanding of the organisation's context. In discussing this idea, Fahey et al (1998) state that leadership must

be built on shared context at a local level in particular. This is to suggest a shared understanding of the organisation's external and internal worlds - the 'lifeworld'. (Habermas 1987). This reflects the perspective of Nonanko and Kohono (1998).

The role of general management is described by Nadler and Tushman (1986) as comprising two tasks. The first is strategy formulation. The second is organising. O'Reilly (1989) demonstrates the role of management in establishing the culture of an organisation that is congruent to the implementation of a strategy that will enable the organisation to compete successfully. What management communicates and how it communicates is crucial to the establishment of a supportive culture and its inherent values - for example the freedom to fail and to learn from that.

This perspective is emphasised by Pascale (1989) in his discussion on the need to have a carefully thought through and interlocking socialisation process for organisation members. This implies the development of a congruent corporate culture in tandem with strategy development. A strategy process that needs diversity of perspectives to be successful requires a culture that actively values diversity. The development of such a culture must therefore be an active and informed decision. The responsibility for this is clearly laid with management according to Nadler and Tushman (1986), Quinn (1986) and others.

Leaders in this situation need to be able to engage in 'boundary' spanning and in facilitating shared understandings across boundaries (Dixon 1994, Brierly et al 1996, Brown et al 1998). They also need to articulate an inspiring vision of the future (Senge 1990, Kiernan 1993) and establish a supportive culture that values diversity (Nadler and Tushman 1986, Quinn 1986, O'Reilly 1989, Pascale 1989, Kiernan 1993). The leadership of learning organisations must focus on systemic forces and collective learning. It must encourage creative tension by both articulating an inspiring future vision and telling the truth about current reality (Beckhard and Harris 1987, Nadler 1989, Senge 1990). Senge (1990) has

identified three specific roles to be played by the leadership of learning organisations. These are those of architect / social designer, teacher and steward. Druskat and Wolff (2001) have identified the importance of formal and informal leadership in establishing emotionally intelligent team norms of behaviour enabling effective team functioning.

Goleman (2000) found that leaders in organisations adopt a number of different leadership styles. The appropriateness of each is determined by the particular circumstances at a given time. Not least among these is the culture of participation and organisational membership that impacts on the relationship between leader and member. He also reports the impact of leadership style on organisation 'climate'. A supportive open climate was found to improve standards of performance - including financial returns.

In learning organisations, the role of organisation member / employee is altered dramatically in comparison to that in other forms of organisation. The member takes on the role of leader within his or her own sphere, and takes joint responsibility for achieving organisational goals and active participation in all stages of the strategy process. The more the members are involved in each stage of the strategy and learning process, the greater their influence on organisational decision-making, development and learning. The members are equal partners with leaders, each having specific but integrated roles (Senge 1990, Kiernan 1993). Membership of this kind requires both facilitating systems and individuals willing and ready to engage. (Jago and Vroom 1988).

A number of difficulties have been identified regarding the operation and impact of participation processes and initiatives. These include their costly and time-consuming nature, ineffectiveness in meeting the strategic needs of organisations, and the impact of interpersonal conflict and lack of commitment (Vroom and Jago 1988, Tjosvold 1995). It is suggested that participation initiatives need to enable strategic tasks. They must do so in a timely and effective fashion. The implications of this for membership participation relate

to the 'readiness' of members to engage, the levels of understanding of the processes, skills, knowledge, self-confidence and level of 'comfort'. These issues also relate to leadership - as this is a form of organisational membership (Vroom and Jago 1988, Tjosvold 1995; Coutu 2002).

In learning organisations, members need to be considered as 'whole' persons with integrated family and work lives and presumably 'community' lives. Conflict between these aspects of life impacts on learning ability and commitment, and the organisational ability to exploit the synergies involved, and sources of environmental feedback (Habermas 1987, Senge 1990).

### **Organisational Limitations to Learning:**

#### **Organisational Culture**

Organisation culture is the concept describing the manner in which an organisation works, the shared pattern of beliefs, expectations and behavioural norms members hold. These norms reflect what is considered to be appropriate and inappropriate behaviour. They reflect particular 'world views' (Deal and Kennedy 1982, Van Maanen and Barley 1989, Schwartz and Davis 1981, O'Reilly 1989, Mezirow 1991).

Pascale (1989) identified two sets of cultural norms. The first he described as driving the success of an organisation. The second he described simply as relating to social conventions. The latter impact on participation, and how those from diverse backgrounds are enabled or hindered in their organisational engagement (Breathnach 1996). These relate to norms of 'emotional intelligence' (Druskat and Wolff 2001). These norms relate to interpersonal communication and conflict particularly.

Organisation culture is a system of social control. It operates at an informal level, and influences the development of formal control systems (Wilkins and Ouchi 1983). Informal



systems enable 'acceptable' behaviour in non-routine situations. They overcome the need for close supervision. Over reliance on formal systems can undermine otherwise successful strategies (Dornbusch and Scott 1975). Culture is usually inherited. Socialisation into a culture and its internalisation is essential in achieving consensus and success. It must be consistently reinforced. Informal systems of control imply a greater sense of personal autonomy and choice. They result in less resistance than in formal systems (Korber and Kluckholm 1952, Ouchi 1981, Feldman 1984, O'Reilly 1989, Pascale 1989).

O'Reilly (1989) suggests that a strong organisational culture may insulate organisation members from alternative perspectives and general social change. The culture may become redundant in changed contexts and may put the organisation at risk. It has also been suggested that members can be 'locked into' narrow worldviews. These impact on their ability to engage in change, and with alternative perspectives (Thompson 1980, Lyle and Mitroff 1980, Dutton and Jackson 1987, Thomas and McDaniel 1990, Mezirow 1991, Coghlan and Brannick 2001). They may be sources of oppression (Freire 1971).

If diversity of cultures exists in an organisation, but remain unrecognised, this can result in lack of mutual understanding and destructive conflict - as has been discussed earlier. Power becomes an important consideration. The most dominant group since the formation of the organisation has the greatest level of control over the organisation and its interpretation of events. This results in a judgmental context often impacting on the understanding of under or non-participation. These interpretations result in the individualisation of difficulties and are not considered in their systemic context by either the dominant or minority cultures (Freire 1971, Salancik and Pfeffer 1977, Siltanen and Stanworth 1984, Keher 1993, Coyle 1995, Breathnach 1996). This again reflects Habermas' (1987) perspective.

This reflects the institutionalisation of the dominant culture in formal organisational processes and structures. This legitimises the authority of those sharing the dominant

culture and undermines that of others. The process relates to the control of resources, distribution of rewards, designation of activities and, essentially, setting the organisation's agenda (Salancik and Pfeffer 1977, Senge 1990, Coombs et al 1992, Breathnach 1996). This impacts on the strategic capacity of the organisation (Thomas et al 1990, Breathnach 1996). A key to effectiveness in these respects has been shown to be achieving a balance between the development of a strong group identity and effective inclusion of diverse world-views. This is particularly at senior management levels (Salancik and Pfeffer 1977, Nadler and Tushman 1986, Kanter 1988, Thomas et al 1990, Kiernan 1993, Du Toit 1998, Gilchrist 1998, Garratt 2000).

### **Learning Dysfunction**

Organisational and individual learning dysfunction exists (Argyris 1999). These impact on the ability of an organisation to create the conducive conditions for learning and innovation - effective strategic change. This has the result of limiting the horizons that an organisation scans, under-utilises the resources available to it in terms of access to information and experience / knowledge, undermines the commitment and motivation of members to engage with the organisation fully and implement strategy. This can ensure the organisation only acts in a narrow, reactive incremental manner until such time as the organisation experiences a major crisis affecting its very survival as it becomes increasingly out of touch. All of these issues have been referred to earlier in the discussion of organisational culture, the importance of diversity, conflict and difference management, and the tasks entailed in organisational learning and strategy cycles.

Learning is often concerned with a limited problem-solving approach - identifying specific errors and correcting them (for example see Argyris 1999, and N.E.S.F. 1997). Self-reflection, critical reflection on behaviour so that the divergence between espoused theory and actual theory in use (Argyris 1991) is clear, is required and behavioural change if necessary. The manner in which a problem is defined and solutions sought can be a source

of problem creation (Senge 1990, Argyris 1991 and 1999, Mezirow 1991, Kiernan 1993, Healy 1998). This relates to the discussion on organisational culture. Learning is enabled in contexts that invite revision (Senge 1990, Giddens 1994, Nonako and Kohono 1998).

Two types of learning have been identified by Argyris (1991). Single loop learning seeks an external source of blame for failure due the existence of defensive reasoning. This blocks learning and often results from fear of failure relating to the cultural context. Double loop learning occurs where these restrictions are not in operation.

Senge (1993) has identified three sources of organisational learning dysfunction: fragmentation, competition and reactivity. These have also been indicated by Habermas (1987), Kerfoot and Knight (1993), Kiernan (1993) and Ghoshal and Bartlett (1996). These issues lead to mechanical, linear forms of thinking, a concern with the appearance of success rather than its reality, dealing with symptoms rather than operating on a systemic basis. 'Fragmentation' has been alluded to specifically in relation to the 'knowledge economy' and the occurrence of 'splintered organisations' relying on diverse, un-integrated forms of expertise (Drucker 2002).

Argyris (1991, 1999) identifies a number of values underlying learning dysfunction. These include remaining in unilateral control, maximising winning and minimising losing, suppressing negative feelings, being as 'rational' as possible, that is defining clear objectives and evaluating behaviour in terms of whether or not they have been achieved. These relate to the process of single loop learning. They reflect the three problems identified by Senge (1990). They also relate to issues raised by Druskat and Wolff (2001) in terms of the impact of emotional intelligence on the work of teams.

These values enable the avoidance of embarrassment or threat, feeling vulnerable or incompetent. They encourage individuals to keep private the premises, inferences and

conclusions that shape their behaviour and avoid testing them in a truly independent fashion. Defensive reasoning is the result, allowing no possibility of development. It has been suggested that the simple act of encouraging open inquiry may be interpreted as intimidation, blaming the more open individual for arousing these feelings about possibly being wrong and, therefore, creating upset rather than development (Senge 1990, Argyris 1991).

### **Organisational Structures and Their Function**

Organisations form to accomplish complex tasks. The task system entails a pattern of interconnected roles and the conditions under which specialist knowledge can be created. Organisation entails decision-making processes, the delegation of authority and the establishment of organisational boundaries (Argyris and Schon 1978, Dixon 1994, Grant 1996, Argyris 1999).

Organisations aim to enable co-ordination and co-operation. The type of task interdependence determines the mode of co-ordination adopted and its relationship to knowledge creation, and therefore strategic organisational change / development. These determine the organisational mechanisms for knowledge integration. The effectiveness of these systems is dependent on shared organisational culture (Thompson 1967, Galbraith 1973, Perrow 1976, Van de Ven et al 1976, Pentland et al 1994, Grant 1996).

It has been suggested that the use of rules and 'routines' by organisations as co-ordinating mechanisms have been encouraged by efficiency rather than effectiveness considerations (implying short term rather than long term and 'local rather than 'system' horizons). These reduce the possibility of including diverse perspectives. This also relates to the lack of slack organisational time to allow reflection as mentioned earlier (Lanzara and Patriotta 2001). The high costs of consensus decision-making, related to the need to make tacit

knowledge explicit, has also been noted (Jago and Vroom 1988, Tjosvold 1995, Grant 1996, Druskat and Wolff 2001).

It is in this context that it has been suggested that hierarchical structures are a response to the need for efficiency in co-ordinating complex systems (Simon 1981). This is of significance in the context of democratically structured voluntary organisations that regularly take hierarchical form. This contrasts, for example, with the system of overlapping strategic learning cycles suggested by Garratt (2000) that focus on:

- Sensing changes in the environment and ensuring monitoring of external performance;
- The 'Learning Board' assessing risk and giving direction;
- Ensuring strategy implementation and feedback.

Hierarchical structures have been found to be ineffective in terms of gaining access to the full knowledge held by members of an organisation due to reasons related to organisational culture and power dynamics. They have been found to distinguish between 'thinkers' and 'doers' thus undermining potential synthesis and synergies and collective coherence. They reduce the development of social infrastructure/ networking. They impact on organisational learning capacity (Freidlanderer 1984, Kanter 1988, Hamel and Prahalad 1992, Kiernan 1993, Grant 1996, Brown et al 1998). This relates to earlier discussions on conflict and communication.

In these conditions, Brown et al (1998) observe the need for boundary objects and roles to enable the development of greater mutual understanding, second loop learning and informal rather than formal interactions - each of these was identified earlier as significant in the context of organisational learning.

Alvesson and Karreman (2001) have identified two dimensions of knowledge management. The first is the mode of intervention - co-ordination or control. The second is the medium of

intervention - social or techno-structural. Based on these, the commentators have identified four types of organisational knowledge management. These are:

- The encompassing community - the sharing of ideas through social co-ordination;
- The extended library - the transfer of information through techno-structural co-ordination;
- Normative control - prescribed interpretation through social control;
- Enacted blueprints - emphasising templates for action through techno-structural control.

Alvesson and Karreman (2001) found that knowledge creation was enabled through loosely coupled systems and the availability of what they termed 'organisational slack'. They suggested that these were the organisational attributes under threat from narrow, managerialist technocratic and socio-ideological forms of knowledge management. They also suggested that the pursuit of efficiency trivialises knowledge by reducing its complexity.

It appears, therefore, that the structures adopted by an organisation have functional relevance. The perception of function, and therefore relevance, is based on the underlying assumptions held by the dominant coalition(s) in and culture of an organisation regarding the relationship between the organisation and the individual.

### **Accountability, Governance and Politics**

Hierarchical structures are associated with decision-making, responsibility and accountability through processes of delegation and representation. They operate on the assumption that all knowledge is available at the apex of the organisation. Where this is not the case, and it has been demonstrated how this might be so in the discussion on

organisational culture and that on leadership, those in organisationally subordinate positions have power over those at more senior levels (Spender 1996).

One of the major criticisms of the literature on learning organisations focuses on the absence of systemic means to manage conflict and politics and to facilitate changes in institutional governance particularly in terms of the impact on 'rank and file' members of an organisation (Coopey 1995). Coopey refers to research by Snell, Kelston and Fletcher (1994) and Becker (1992) in this respect.

The literature suggests that innovative ideas are dependent for success on political support requiring political coalitions. Kanter (1988) suggests these coalitions result from task and political interdependency. They may be hierarchical and horizontal. They require high levels of communication and network density. Active 'agents' and communication channels are needed to transfer and aid the diffusion of innovation - that is to suggest strategic and structural linkages internally and externally to the organisation. This requires access to information and resources.

A need to blend formal analysis, behaviour techniques and power politics in a process of 'logical incrementalism' to achieve strategic change is identified by Quinn (1986). Beer et al suggest (1990) that, in this context, the most enduring change starts at the boundary with the environment or 'grassroots' and moves towards the centre requiring change in administrative procedures and structures to enable innovative potential to emerge. Politics is the reality it seems, and it also appears that it can be a positive process enabling organisational learning and change - depending on the culture and perspective with which participants engage.

Coopey (1995) criticises Senge (1990) and Pedlar et al (1988; the criticism would also relate to Pedlar's work published in 1997) in their avoidance of addressing these issues and

particularly that of the formal empowerment of organisational members in the governance process.

Drucker (1992) and Garratt (2000) adopt a somewhat alternative perspective. They focus on the role of the central board of the organisation. They suggest that if this is effective, it will facilitate the organisation's environmental consciousness and its ability to respond. Drucker observes that the role of the chief executive officer is crucial to this process. This reflects the earlier discussion regarding the potentially insulating effect of organisational culture, the importance of the inclusion of diversity, the development of group identity and the role of organisational leadership. This in turn relates to the culture of communication and conflict management - politics - in terms of its contribution to organisational learning, development and strategic change. The complexities have been recently discussed by Sorcher and Brant (2002).

Garratt (2000) suggests that the almost inevitable result of organisation's operating effectively on the basis of the learning principle is that the organisation will increasingly become democratised. It has also been suggested that democracy is a functional necessity whenever a social system competes for survival during periods of change (Freidlanderer 1994). Lijphart (1998) describes democracy as an arrangement that is able to produce as much consensus as is possible in divided societies. Freidlanderer's definition of the necessary values underlying democracy relates to the creation of conditions, through structures and processes, for continuous dialogue - as referred to already.

This brings the discussion full circle to the issues raised by Argyris (1999), Habermas (1987) and Kim (1993) discussed earlier regarding the relationship between the organisation and the individual - and its impact on organisational learning and strategic change capabilities of the organisation.



## **Conclusions**

The literature review has discussed the relationship between the individual and the organisation, and the impact of this relationship on the capacity of an organisation to learn and engage in strategic change.

It has discussed the nature of the relationship between organisational learning and the process of strategic development, their functions and relationships to an organisation's environment. It has identified the twin tasks of organisational control and organisational learning as being central to effective organisational strategy in the long term. This implies a process of continuous organisationally strategic change to ensure an organisation is fully attuned to current and anticipated developments in its environment. The literature identifies the increasing importance of organisational learning in this process, given the increasing pace of change occurring in the 'competitive' environment. At the heart of these processes is effective communication and dialogue allowing for the inclusion of, and reflection on, diverse perspectives - relating to the relationship between the organisation and its members / need sources.

The concept of a 'competitive environment' has been considered relevant to voluntary organisations. This has been interpreted as significant in terms of maintaining the relevance of an organisation's mission and operation - rather than in terms of direct profit making capacity and competitive market position as in the business world. Market position may also be an issue for the type of organisation under discussion here, however, particularly in terms of fundraising capacity from private, commercial and state sources.

The review has considered the dynamics of individual and organisational learning and dialogue, and factors impacting on the capacity to learn at both levels.

The review has raised issues regarding strategic change for voluntary democratically structured organisations, particularly in terms of the importance of the 'ownership' of change processes and objectives by organisation members. This relates to the need to maintain levels of commitment and involvement. Given that organisation members are the core organisational resource and source of power in these sorts of organisations, this issue is of particular significance.

This review has considered the dynamics of organisational participation and organisational culture and their impact on the development of organisational structures and procedures, formal and informal processes, and the strategic and learning capabilities of organisations. The potential impact of these processes on the institutionalisation of the power of particular groups and the development of related organisational socialisation processes in insulating an organisation and its leadership from pertinent changes in its environment have been discussed. The process has been shown to result in stunted and dysfunctional organisational strategic and learning capabilities - undermining the future survival of organisations.

A number of factors have been identified in the review as having particular significance in enabling strategic change and organisational learning - and therefore strategic change on a continuous basis. These include the importance of valuing and including diverse perspectives in strategic tasks and the importance of appropriate conflict management and communication. In this respect it has also identified the need for the development of social networks and infrastructure, the need to focus on the articulation and establishment of shared future vision and shared analysis of current situations as being of importance.

The significant role leadership plays in enabling these has been specified. This is in terms of energising actions through motivating future visions, the creation of constructive contention through telling the 'truth' about current and future realities and visions. It

includes empowering membership to participate and take responsibility in a supportive environment related to enabling organisational processes and structures, boundary spanning capacities, and effective management of organisational transitions / change. Fundamental to all of these considerations is the development and maintenance of a supportive organisational culture.

These issues have particular significance for democratically structured voluntary organisations. Such organisations need to engage in continuous strategic change. This is in order to avoid the dangers of discontinuous and large-scale change on the voluntary commitment of members. Organisational learning provides such an approach and is akin to effective strategy development - as demonstrated in the comparison between organisational strategy cycles and learning cycles. The inherent tasks provide a continuous reflection and action agenda for such organisations to enable their innovative, responsive and representative capacities, reflexivity (Giddens 1994).

Government has identified these capacities as being comparatively unique and valuable characteristics. The capacities are also implied in the basic structures and missions as being central to the existence of voluntary, democratically structured organisations.

In the literature, attention has been drawn to the relationship of these factors to organisation governance, accountability and politics. This is an area where the literature on 'the learning organisations' *per se* has been criticised for its lack of consideration. It is suggested here that 'politics' can play a central, positive role in organisational learning and strategic change depending on the organisational culture.

The literature has identified a number of central considerations relating to effective continuous strategic change and organisational learning. This includes the importance of

approaching the matter on the basis of an integrated system. The approach is primarily concerned with a system of processes rather than structures.

The review has established a 'chain of evidence' from the general literature on organisational dynamics related to these issues. By looking at the matter in this way, the review has attempted to enable a rounded perspective to be adopted regarding continuous strategic change / organisational learning and their relationship to membership participation. It has attempted to bring together the specific impacts of various organisational dimensions impacting both positively and negatively on the strategic change capabilities of organisations in a systemic manner. As such, it has attempted to bring a systems perspective to the development of the literature review.

This literature review has sought to explore the relationship between organisational strategy, learning and knowledge creation, including their inherent processes. It has done this through:

- A comparison of the core tasks identified in the learning and strategy cycles discussed, and the relationship between those tasks;
- Considering their impact on an organisation's ability to constantly dialogue with its environment and to engage its members in knowledge creation (learning) through communal reflective practice.

The processes required to enable organisational strategy, learning and innovation, and those factors which act as blocks or inhibitors to such development, have been shown to strongly connected to relational processes involving:

- Communication;
- Conflict and difference management;
- The impact of these on the inclusion of diversity (cultural boundary spanning).

These processes are implemented through the manner in which organisational leadership and membership are enacted. This was also discussed in the review. The review has also demonstrated how organisation culture determines how these processes are engaged, and the maintenance of those patterns of behaviour over time.

As suggested in Chapter One, at the heart of the literature review was the question: What is the type of communication and dialogue at the core of these processes that enables the attainment of mutual understanding allowing effective and strategic forward organisational movement, effective and mutually enabling relationships between the organisation and the individual members? The review has attempted to answer this by looking at the requirements for innovation and learning, identified above, and the factors that inhibit these processes relating to the establishment of organisational culture and its maintenance.

Following this review of literature relating to business organisations, a number of propositions can be suggested regarding the relationships between membership participation, organisational learning and strategic change. These are:

*Proposition 1*

Organisational culture impacts on roles and types of participation of organisational members including the nature of their inter-relationships. Similarly it impacts on the establishment and maintenance of organisational processes, procedures and structures.

*Proposition 2*

This in turn impacts on the effectiveness of an organisation's:

- Environmental scanning capacity;
- Information gathering, analysis and knowledge creation processes;
- Strategic development capabilities (including change capacity);

- Learning capabilities.

This relates in particular to an organisation's ability to engage with those with diverse experiences, perspectives and 'cultures'. These processes, capabilities and relationships entail, at their core, relational processes of communication, conflict and role relationships. Where these processes and capabilities are underdeveloped, organisational learning and strategic dysfunction occur.

### *Proposition 3*

To be successful, therefore strategic organisational change management must adopt approaches that:

- Adopt a systemic organisational focus;
- Address the effects of organisational culture on how and when the membership are involved in the organisational strategy development cycle particularly through its impact on communication, management of internal conflict / difference, organisational leadership and membership roles;
- Adopt specific and congruent arrangements for the management of systemic change, including a timeframe for its completion.

In addition to increasing effective membership participation, change initiatives of this type will increase the learning and innovative capacities of organisations.

Therefore, building on these propositions the following can be suggested in terms of voluntary, democratically structured organisations:

### *Proposition 4*

In democratically structured voluntary organisations, organisational culture impacts on the roles and types of participation of organisational members including the nature of their inter-relationships. Similarly it impacts on the establishment and maintenance of organisational processes, procedures and structures.

*Proposition 5*

This in turn impacts on the effectiveness of a voluntary, democratically structured organisation's:

- Environmental scanning capacity;
- Information gathering, analysis and knowledge creation processes;
- Strategic development capabilities (including change capacity);
- Learning capabilities.

This relates in particular to an organisation's ability to engage with those with diverse experiences, perspectives and 'cultures'. These processes, capabilities and relationships entail, at their core, relational processes of communication, conflict and role relationships. Where these processes and capabilities are underdeveloped, organisational learning and strategic dysfunction occur.

*Proposition 6*

To be successful, therefore strategic organisational change management in democratically structured organisations must adopt approaches that:

- Adopt a systemic organisational focus;
- Address the effects of organisational culture on how and when the membership are involved in the organisational strategy development cycle particularly through its impact on communication, management of internal conflict / difference, organisational leadership and membership roles;
- Adopt specific and congruent arrangements for the management of systemic change, including a timeframe for its completion.

In addition to increasing effective membership participation, change initiatives of this type will increase the learning and innovative capacities of organisations.

Building on these propositions, a number of hypotheses are posed here to test the applicability of this theory to voluntary democratically structured organisations, and in particular to the relationship between membership participation, organisational learning and strategic change capabilities within the voluntary, democratically structured organisational sector. These are as follows.

*Hypothesis 1*

The lower the level of participation of a diversity of organisational members / actors in the strategic development functions of a voluntary, democratically structured organisation the more it will suffer from learning and strategic dysfunction. The corollary is also true.

*Hypothesis 2*

The more organisational culture inhibits organisational participation of a diversity of organisational members / actors in the strategic functions of such organisations, the more organisational culture impacts negatively on the development of organisational learning and strategic capabilities in voluntary, democratically structured organisations. The corollary is also true.

*Hypothesis 3*

If organisational initiatives addressing these participation and strategic learning difficulties in these types of organisations are to succeed, the focus of the initiative must be change at a systemic organisational level rather than at a non / under participating individual member or group level only.

*Hypothesis 4*

To be successful, these change initiatives must address the effects of organisational culture on how and when the membership are involved in the organisational strategy development cycle particularly through its impact on:



- Communication
- Management of internal conflict / difference
- Organisational leadership, representative and membership roles?

#### *Hypothesis 5*

In order for these change initiatives to be successful, specific and congruent arrangements for the management of systemic change, and a timeframe for its completion, must be put in place by the organisation

#### *Hypothesis 6*

In addition to increasing effective membership participation, change initiatives of this type will increase the learning and innovative capacities of voluntary, democratically structured organisations.

These questions can be structured as an Input Output Analytical Model related to the relational processes (i.e. communication, conflict and difference management, and participation styles and roles) and other factors identified in the questions that, having been tested, may be used as an aid to diagnosis to enable the strategic change and learning capabilities of voluntary, democratically structured organisations. This is understood as being in the context of achieving the organisational mission more effectively and responding to environmental challenges. This model is discussed in the next chapter.

**Chapter Three: Relational Processes Impacting on Organisational Participation, Learning and Strategic Change: An Input Output Analytical Model Proposed**

The literature review explored the issues and dynamics concerning the relationship between the individual and an organisation in terms of their impact on organisational learning, strategic change and participation capabilities and capacities. This was in the context of the effective achievement of organisational mission and response to environmental challenges. This enabled a number of propositions to be stated and a series of hypotheses to enable the testing of the applicability of this theory to voluntary, democratically structured organisations. The theory, propositions and research questions highlighted a number of important relational processes in the development of organisational learning, participatory and strategic change capabilities. The propositions and research questions are stated, and the relational processes are summarised, in the concluding section of the literature review (chapter two).

In addition to this, the identification of a number of these key relational processes has suggested an 'Input Output Analytical Model'. Its intended purpose, beyond this study, is the provision of a diagnostic instrument to facilitate the development of organisational learning, participatory and strategic change capabilities within democratically structured voluntary organisations to enable the effective achievement of organisational mission and response to environmental challenges. This is through enabling the identification of significant patterns of behaviour that impact over time on the development of participatory, learning and strategic change capabilities of such organisations. Naming the world (Freire 1971) enables effective change action to be planned, undertaken and reviewed. Having a means to enable the 'naming' - i.e. identification, diagnosis - is therefore important

In terms of this study, the model is utilised as a guide to the collection of data and as an aid to its analysis. It aids the process of analysis in this context as it enables a 'system' of identifiable patterns drawn from the literature, and stated in the propositions and hypotheses in the concluding section of the literature review, to be established as a basis for comparison. In other words, it *enables the analytical strategy of pattern matching and explanation building* to be undertaken. The use of the model in this way in this study, 'tests' the model.

The model has three dimensions. They focus on:

- Elements contributing to the development of organisational culture at the foundation of an organisation;
- The identification of organisational patterns related to an organisation's strategy cycle and learning capacity;
- The dynamics of an organisational change process.

The model is structured in three parts. These are intended to be used as an integrated system, but can also be utilised individually if the nature of the organisational exploration is more limited.

Part one relates to proposition one and four, and hypotheses two - and the theoretical framework related to these outlined in the literature review - outlined in the concluding section of the literature review. Part one of the model concentrates on the organisational processes involved in the establishment of organisational culture at the foundation of the organisation. Those elements which it includes are:

- Decisions in relation to the structuring of the organisation, and the agreement of organisational rules and procedures;
- Behavioural norms evident through communication processes, conflict and difference management and decision-making processes;
- Formal and informal organisational roles relating to leadership, membership and representation.

Part one also seeks to identify the profile of the membership at the foundation of the organisation - as part one of the model's 'input'. It seeks to identify organisational patterns of participation related to the establishment of organisational culture as part one of the model's 'output'.

Part two relates to proposition two and four, and hypotheses two and four - and the theoretical framework related to these outlined in the literature review - as outlined in the concluding section. Part two focuses on processes through which organisational learning occurs. These include:

- Communication - its direction and focus, level and processes related to re-communication;
- Internal conflict / difference management in terms of the context and approach with which conflict/ difference is addressed;
- Participation styles - looking at the formal organisational roles of leader, representative and member including the profiles of the occupants of these roles (the definition of these roles implies particular relationships).

The 'input' for part two is the profile of organisation members. Its 'output' seeks to

identify the organisational patterns of participation and organisational learning capacity / dysfunction.

Part three relates to proposition three and six, and hypotheses one to six - and the theoretical framework related to these outlined in the literature review - as outlined in the concluding section of the literature review. Part three is concerned with processes of organisational transformation. These include:

- Arrangements for change management in terms of their focus, management, timeframe and membership participation;
- Communication in terms of its direction and focus, level and re-communication;
- Internal difference/ conflict management in terms of the context in and approach with which it is addressed;
- Participation styles in terms of the formal organisational roles of leader, representative, member and the profile of the occupants of these roles (the definition of these roles implies particular relationships).

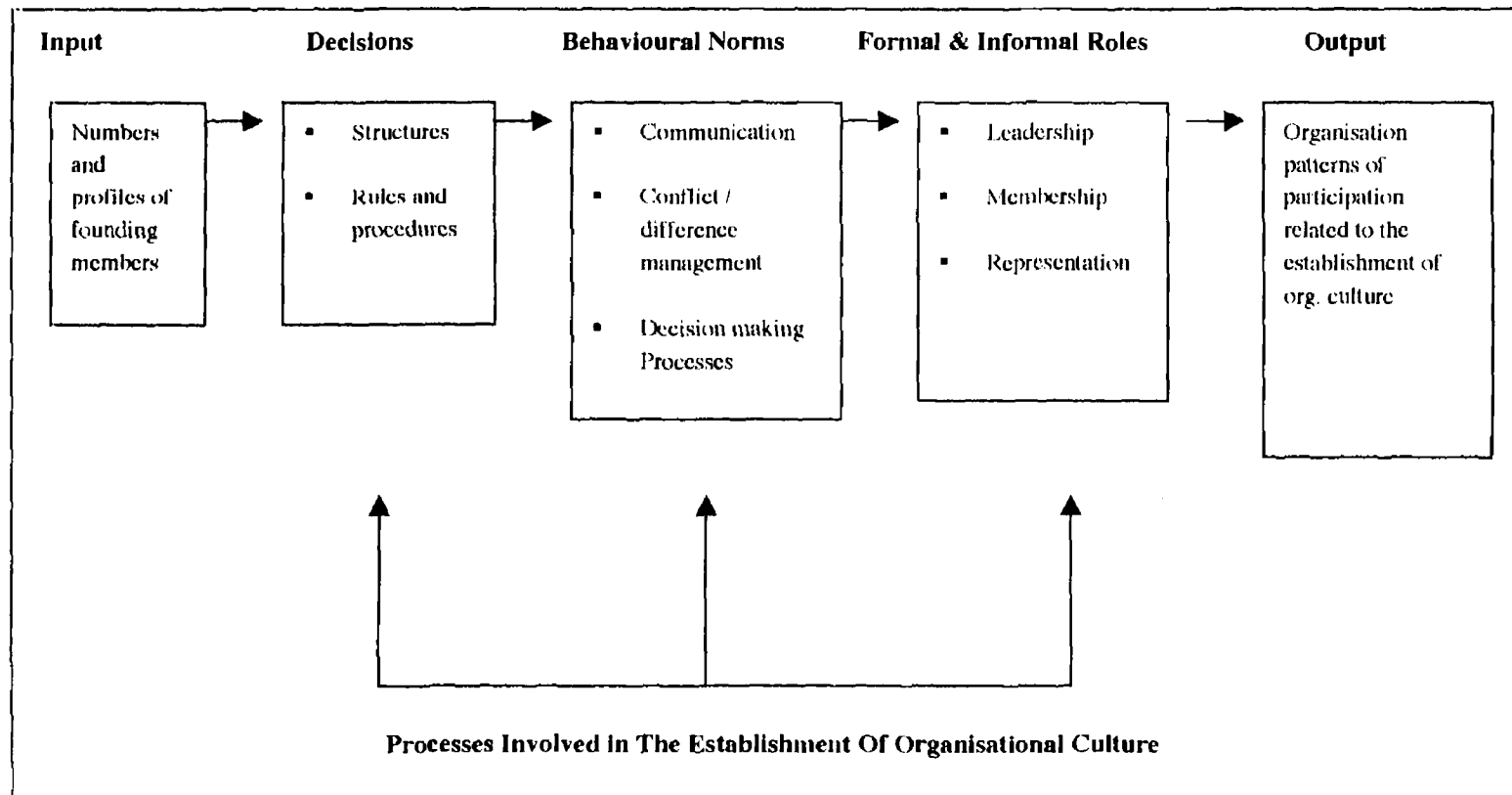
Part three's input is, again, the profile of the organisational membership. Its output is the organisational patterns of participation, learning and strategic change. Part one and part two provide the context for understanding the development of the patterns identified in the output of Part Three (see Exhibit 7,8,9).

Where organisational learning and strategic change capabilities are referred to, this entails what the organisation actually 'does as opposed to what it can do in theory. This is because the capabilities referred to relate to the integrated strategic-learning tasks outlined in the literature review (action, reflection, conclusion drawing / decision making, testing). These require the undertaking of actual and practical action, not simply the competencies to undertake these tasks - which is obviously also implied.

Each of the themes included in each part is accompanied by a 'question metrics' - or set of questions. These relate to the relevant propositions and research questions, and the literature / theory to which the propositions and research questions relate. The question metrics enable both the definition of the themes and the application of the three parts of the model. In this way, they allow the specific and interrelated data to be gathered for subsequent analysis in terms of the patterns of organisational dynamics which emerge. The question metrics are included in Exhibits 10,11,12.



**Exhibit 7 Input - Output Analytical Model Part 1 :**  
**Elements contributing to the development of organisation culture at the foundation of the organisation**



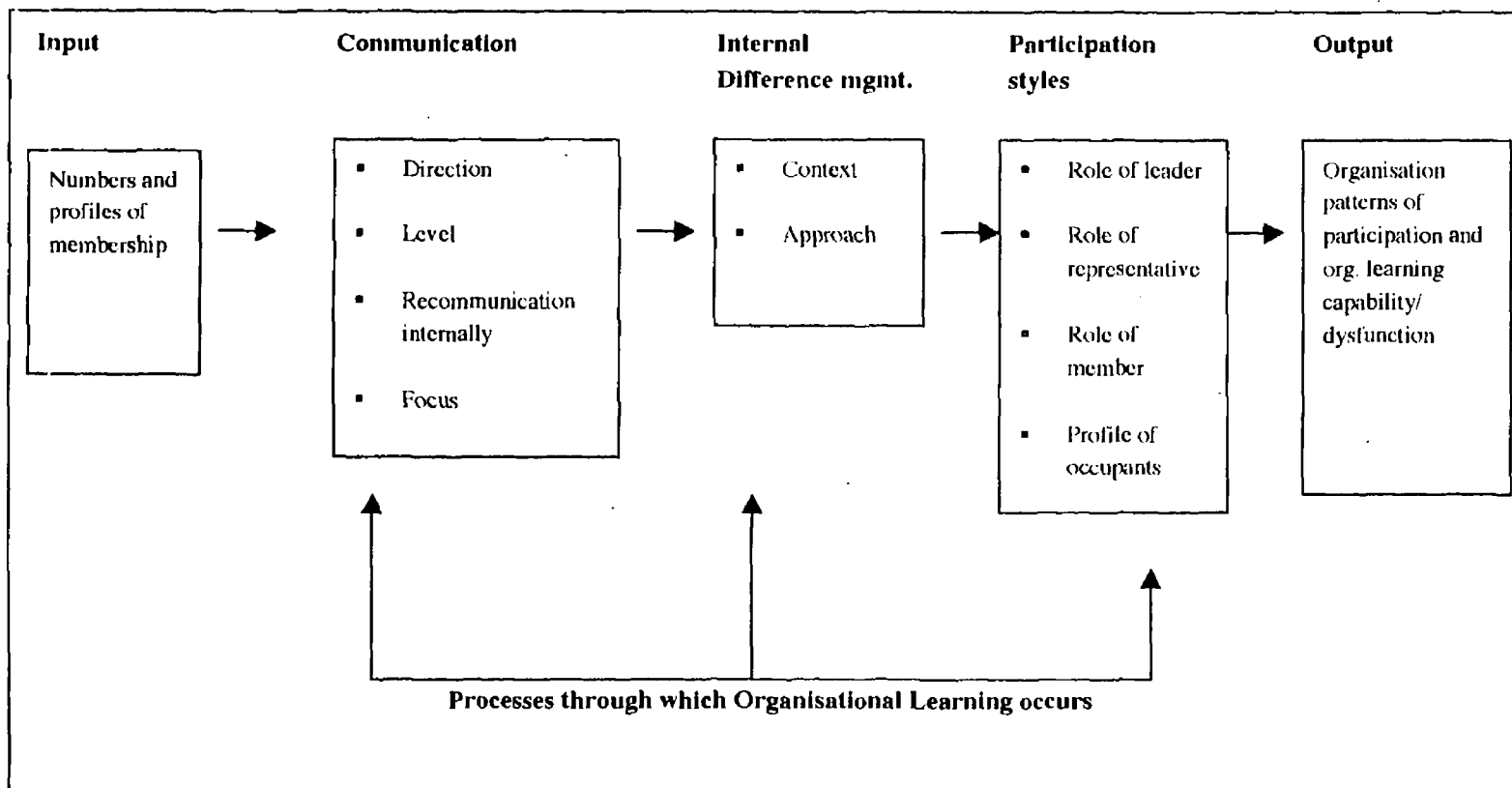


**Exhibit 8**

**Input - Output Analytical Model Part 2**

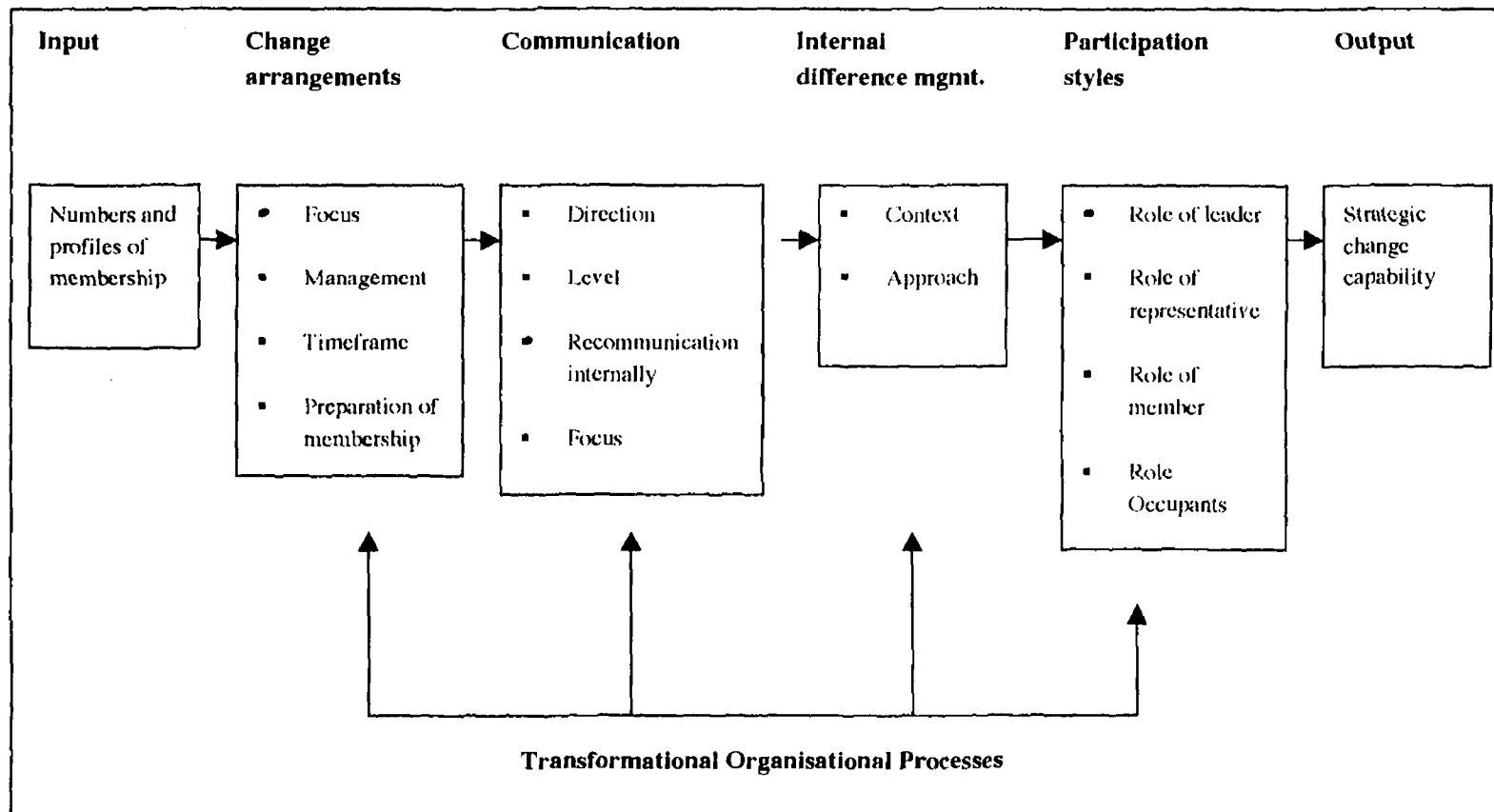
**Identification of (a) participation patterns in the organisation's strategy cycle (strategic-learning tasks)**

**(b) organisational learning capability**



<sup>1</sup> The terms organisational learning or strategic change capability imply an 'active' capability not simply a theoretical one, or a potential. This reflects the integrated strategic learning cycle tasks: action, reflection, conclusion drawing / decision making, testing.

**Exhibit 9 Input - Output Analytical Model Part 3**  
**Elements that enable strategic change capability<sup>1</sup>**



<sup>1</sup> The terms organisational learning or strategic change capability imply an 'active' capability not simply a theoretical one, or a potential. This reflects the integrated strategic learning cycle tasks: action, reflection, conclusion drawing / decision making, testing.



## **Exhibit 10**

### **Input output Model Part One: Question Metrics**

#### **1. Input**

- (a) What was the profile(s) of the people involved at the foundation of the organisation, particularly those undertaking leadership roles?

#### **2. Decisions**

- (a) What organisational structures were developed and adopted in the early years of the organisation's existence?
- (b) What organisational rules and procedures were developed and adopted in the early years of the organisation's existence?

#### **3. Behavioural Norms**

- (a) Communication

- (i) Direction:

- Who communicated with whom?
- How frequently did they communicate?
- What means of communication was used?
- What depth of communication or 'dialogue' occurred?

- (ii) Focus:

- What was the focus of communication - future, current reality?
- With what tasks were the communication concerned - information gathering, information imparting, reflection, analysis, knowledge integration, decision making, decision imparting?

- Did the communication have a long-term policy making focus or a short term or reactive approach?
  - Did the communication have a systemic or narrow focus?
- (ii) Level:
- At and between what organisational levels did various types of communication occur?
- (iii) Re-communication:
- Was communication received at one organisational level re-communicated to others - how, where, when, to whom?
- (b) Conflict/Difference Management
- (i) Context:
- In what context was conflict or difference management approached - utilising 'social infrastructure' / relationship base, formal structures and process?
- (ii) Approach:
- What approach was adopted - constructive contention, threat to power / resources, dialectical / dialogical, adversarial?
- (iii) Decision-making processes:
- What decision-making processes were used - who was involved, what focus and perspective did they adopt, were they narrowly reactive in approach or systemic?

(a) Formal and Informal Organisational Roles:

(i) Leadership:

- How was leadership defined - the sole authority/ source of knowledge, social architect, enabler, facilitator, guardian of the organisation's mission and membership, vision stator and teller of truth regarding current reality, knowledge integrator?
- Who was perceived to play leadership roles?
- What was the profile of those in formal leadership roles?

(ii) Representative:

- How was this role perceived - part of elite group or as part of membership?
- Was the role and how was the role engaging in boundary spanning, 'translating'?
- What was the profile of those engaged in representative roles?

(iii) Member:

- How was the role perceived - passive organisational resource or leader in own sphere?
- Was the member understood in 'holistic' terms, or as a 'fragmented' entity determined by organisational tasks division, mission and organisational level?
- What was the profile(s) of the membership?

#### 4. Output

- (a) What were the organisational patterns of participation?

## **Exhibit 11**

### **Input Output Model Part Two: Question Metrics**

#### **1. Input**

- (a) What is the profile(s) of the membership of the organisation?

#### **2. Communication**

(i) **Direction:**

- Who communicates with whom?
- How frequently do they communicate?
- What means of communication is used?
- What depth of communication or 'dialogue' occurs?

(ii) **Focus**

- What is the focus of communication - future, current reality?
- With what tasks is the communication concerned - information gathering, information imparting, reflection, analysis, knowledge integration, decision making, decision imparting?
- Does the communication have a long-term policy making focus or a short term or reactive approach?
- Does the communication have a systemic or narrow focus?

(iii) **Level:**

- At and between what organisational levels do various types of communication occur?

(iv) **Re-communication:**

- Is communication received at one organisational level re-communicated to others - how, where, when, to whom?

### **3. Internal Conflict / Difference Management**

(i) Context:

- In what context is conflict or difference management approached - utilising 'social infrastructure' / relationship base, formal structures and process?

(ii) Approach:

- What approach is adopted - constructive contention, threat to power / resources, dialectal / dialogical, adversarial?

(iii) Decision-making processes:

- What decision-making processes were used - who is involved, what focus and perspective do they adopt, are they narrowly reactive in approach or systemic?

### **4. Participation Styles**

(i) Leadership:

- How is leadership defined - the sole authority/ source of knowledge, social architect, enabler, facilitator, guardian of the organisation's mission and membership, vision stator and teller of truth regarding current reality, knowledge integrator?
- Who is perceived to play leadership roles?
- What is the profile(s) of those in formal leadership roles?



- (ii) Representative:
- How is this role perceived - part of elite group or as part of membership?
  - Is the role and how is the role engaging in boundary spanning, 'translating'?
  - What is the profile(s) of those engaged in representative roles?

- (iii) Member:
- How is the role perceived - passive organisational resource or leader in own sphere?
  - Is the member understood in 'holistic' terms, or as a 'fragmented' entity determined by organisational tasks division, mission and organisational level?
  - What is the profile(s) of the membership?

**5. Output**

- (a) What are the organisational patterns of participation?
- (b) What are the organisational patterns of learning and engagement in the strategy cycle?

## **Exhibit 12**

### **Input Output Model Part Three: Question Metrics**

#### **1. Input**

(a) What is the profile(s) of the membership of the organisation?

#### **2. Communication**

(i) Direction:

- Who communicates with whom?
- How frequently do they communicate?
- What means of communication is used?
- What depth of communication or 'dialogue' occurs?

(ii) Focus:

- What is the focus of communication - future, current reality?
- With what tasks is the communication concerned - information gathering, information imparting, reflection, analysis, knowledge integration, decision making, decision imparting?
- Does the communication have a long-term policy making focus or a short term or reactive approach?
- Does the communication have a systemic or narrow focus?

(ii) Level:

- At and between what organisational levels do various types of communication occur?

(iii) Re-communication:

- Is communication received at one organisational level re-communicated to others - how, where, when, to whom?

### **3. Internal Conflict / Difference Management**

(i) Context:

- In what context is conflict or difference management approached - utilising 'social infrastructure' / relationship base, formal structures and process?

(ii) Approach:

- What approach is adopted - constructive contention, threat to power / resources, dialectal / dialogical, adversarial?

(iii) Decision-making processes:

- What decision-making processes were used - who is involved, what focus and perspective do they adopt, are they narrowly reactive in approach or systemic?

### **4. Participation Styles**

(i) Leadership:

- How is leadership defined - the sole authority/ source of knowledge, social architect, enabler, facilitator, guardian of the organisation's mission and membership, vision stator and teller of truth regarding current reality, knowledge integrator?
- Who is perceived to play leadership roles?
- What is the profile(s) of those in formal leadership roles?

- (ii) Representative:
- How is this role perceived - part of elite group or as part of membership?
  - Is the role and how is the role engaging in boundary spanning, 'translating'?
  - What is the profile(s) of those engaged in representative roles?

- (iii) Member:
- How is the role perceived - passive organisational resource or leader in own sphere?
  - Is the member understood in 'holistic' terms, or as a 'fragmented' entity determined by organisational tasks division, mission and organisational level?
  - What is the profile(s) of the membership?

#### **4. Output**

- (a) What are the organisational patterns of participation?
- (b) What are the organisational patterns of learning and engagement in the strategy cycle?

The purpose in proposing an 'input output' analytical model is to enable a deep and full understanding of the issues impacting on organisational learning, strategic change and participation from the inception of the organisation to current attempts to engage in strategic change. In other words, the intention is to facilitate a deep understanding in the context of specific organisations of the relationship between the organisation and individual members - or clients - and the factors impacting on this relationship. Such analysis, or diagnosis, as has already been suggested, could enable the development of participation, learning and strategic change capabilities within democratically structured voluntary organisations. This is with a view to enabling the more effective achievement of mission and response to environmental challenges. This relates to Pettigrew's (1985) approach to the analysis of organisational change.

In context of this study, the model enables the analytical strategy adopted - i.e. pattern matching. The patterns have been identified in the literature review and the model allows for their analysis as a set of patterns or system. This is further discussed in the methodology chapter, chapter four

## **Chapter Four: Research Methodology**

In order to test the hypotheses and Input Output Analytical Model proposed in this study, a research methodology was required that enabled both a systems and an historical perspective to be applied. This necessitated gathering and exploring a complexity and diversity of data and data sources. These are detailed at the front of each case study description and are discussed later in this chapter. Such an approach was outlined by Pettigrew (1985) in the context of his major study of change in I.C.I.

Pettigrew, in the explanation of his research methodology, stated that the theory and practice of organisational change requires viewing it as a continuous process, rather than as episodic and as separate from ongoing processes in an organisation. Not to do so inhibits questioning regarding the dynamics and processes of innovation from which emerge empirical patterns and theoretical propositions, not just the patterns and dynamics of change. The major objective of Pettigrew's research was to enable the utilisation of available deep contextual data and an extended sequence of longitudinal data, as in this study. This was in order to offer a comparative analysis and an expanded focus on organisational change. This has implications for the manner in which data must be structured and described, and analysed, as the data do not simply relate to individual 'episodes' but relates equally to the relationship between the episodes and individual pieces of data. The approach must not only reflect the breadth of the data but also the dynamics and chronology of their evolution. By necessity, therefore, it is a 'narrative' method.

The same author also stated that the possibilities and limitations of change in any organisation are influenced by the attitudes and relationships between interest groups in and outside of the agency, and by the mobilisation of support for change within the power structure at any point in time. It is important, therefore, that such intra-organisational

processes are studied comparatively through time, and also within a frame of reference that recognises the enabling and constraining circumstances of changing external environments.

Central to the analytical building blocks and broader theoretical and methodological contribution of this approach is an attempt to specify some of the language and conditions that link multilevel and processual analysis of organisational phenomena in a holistic, contextualised manner. Pettigrew suggests that some of the prerequisites for this are:

- A clearly delineated, but theoretically and empirically connectable set of levels of analysis. Within each level of analysis there needs to be a specified set of categories or variables;
- A clear description of the processes under examination, reflecting a continuing system with a past, present and future. Social theory must take into account the history and future of a system and relate them to the present. The process is seen as a continuous, interdependent sequence of action and events used to explain the origins, continuance and outcome of some phenomena;
- The processual analysis requires the specification of the model of 'man' underlying the research ;
- Crucial to this approach to contextualist analysis is the way the structural or contextual variables and categories in the vertical analysis are linked to the processes under observation in the horizontal analysis.

It is insufficient to treat context either as a descriptive background, or as an eclectic list of antecedents that somehow shape process. Processes are both constrained by 'structures' and shape 'structures' either in the direction of preserving them or altering them. It is also important to conceptualise 'structure' and 'context' not just as a barrier to action but also as essentially involved in its production (Pettigrew 1985, Habermas 1987). In addition it is necessary to demonstrate how aspects of structure and context are mobilised or activated

by actors as they seek outcomes of significance to them (Freire 1971, Pettigrew 1985, Habermas 1987).

Research of this type is therefore engaged in multilevel theory construction.

“It is the dialogue between trends and forces in a multilevel and changing context, and the relationships, action and initiatives between groups and individuals seeking to adjust social conditions to meet their ends, that much organisational change – its origins, mechanisms, and forms – can be located and understood” (Pettigrew 1985: 37).

The development of the Input Output Analytical Model is an attempt to address these issues in the context of enabling an understanding of the relationship between membership participation, organisational learning and strategic change capabilities in democratically structured organisations. This is understood within the framework of enabling greater effectiveness in achieving the organisational mission and response to environmental challenges even though the focus of the model is the internal dynamics of the organisation.

The design has attempted to delineate a theoretical but empirically connected set of levels of analysis. Within each level of analysis there is a specified set of categories related to process. The model was developed on the basis of description of processes relevant to the study in the literature review, and subsequently their interconnection described in the propositions and hypotheses proposed in chapter two.

In the design of the model, the question metrics provided a description of the processes under examination. The three-part structure of the model reflects a continuing system with a past, present and future. This has been described in an earlier chapter. The process is seen as a continuous, interdependent sequence of action and events used to explain the origins, continuance and outcome of the processes under review. This approach provides a contextualist analysis in the manner in which the structural and contextual categories in the vertical analysis are linked to those under observation in the horizontal analysis (relating to the historical and system evolution of the organisations in question).

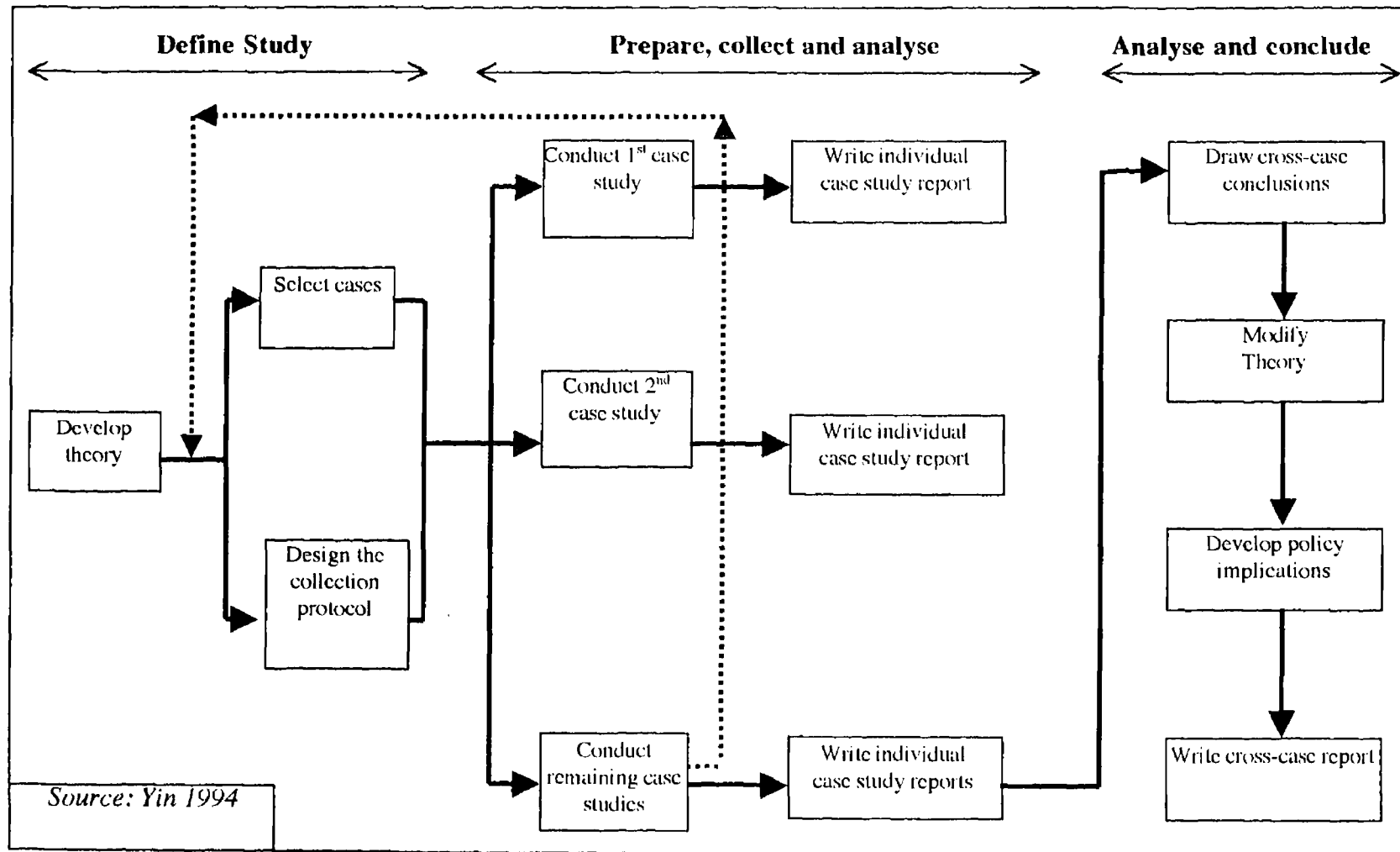


The importance of theory in both case study and qualitative research methodology is an issue highlighted by Yin (1994) and Strauss and Corbin (1991). This relates to the importance of theoretical context for case study and qualitative research in terms of enabling replicability and representivity.

The multiple case study methodology has been adopted here to meet the complex data collection and analytical needs of this study as outlined above. The complexity relates the system's and historical perspectives required and enabled by the methodology. These perspectives were crucial to observing the factors impacting on the relationship between the member and the organisation, and in this context the evolution of the organisations over time in terms of patterns of participation, organisational learning and strategic change. In other words, the methodology enabled the observation of the development of organisational systems over time - particularly in terms of the relationships between membership participation, organisational learning and strategic change.

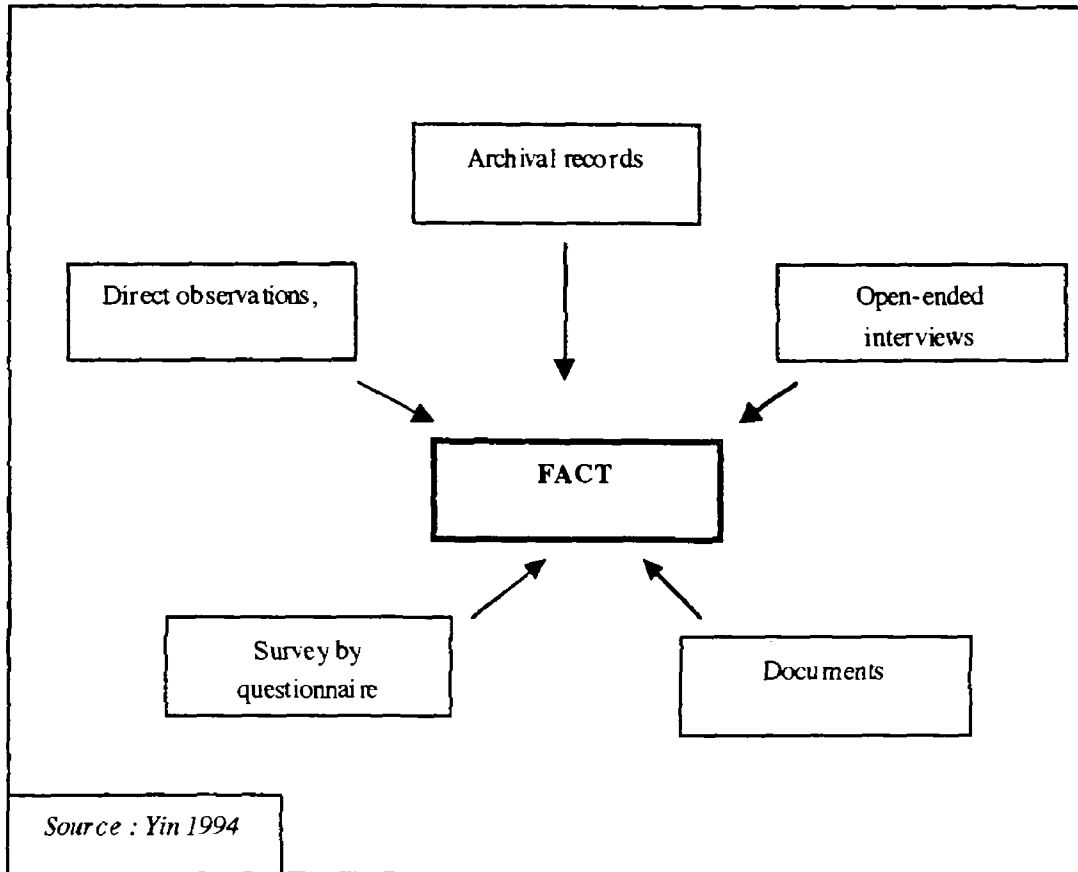
Yin (1994) is one of the main exponents of this research method. He has described it as a variant of the single case study methodology (Exhibit 10). While some disagree with this approach (Arganoff and Radin 1991, George 1979, Lijphart 1975) and consider multiple case studies as quite different, Yin's definition appears to apply in this instance. He states that a multiple case study methodology is an empirical inquiry that investigates a contemporary phenomenon within its real-life context, especially when the boundaries between the phenomenon are not clearly evident. The inquiry copes with the technically distinctive situation in which there are many more variables of interest than data points. In particular, Yin outlines the need for the utilisation of diverse information sources with a view to establishing convergent lines of enquiry (triangulation) (Exhibit13).

**Exhibit 13 Case Study Method**





**Exhibit 14 ; Convergence of lines of multiple enquiry**



Key to the success of the use of the multiple case study methodology is the concept of replicability. Fundamental to this is the development of an effective and 'rich' theoretical framework. This study provided this by drawing on the body of organisational literature rather than simply that on strategy, organisational learning, knowledge creation and 'participation'. This meant that a total system perspective could be developed in terms of both negative and positive impacts of various factors in addition to their interactions.

Yin (1994) discusses this theoretical requirement in terms of its relationship to the gathering and analysis of case study data. He states that each case study must be carefully selected so that it either (a) predicts similar results (a literal replication) or (b) produces contrasting

results but for predictable reasons (theoretical replication). The framework needs to state the conditions under which a particular framework later becomes the vehicle for generalising to new cases. Furthermore, if some of the empirical case studies do not work as predicted, the theory must be modified. Yin indicates that the initial step in designing case study research must, therefore, consist of theory development.

The case selection and definition of specific measures are important steps in the design and data collection process. Each individual case study consists of a 'whole' study, in which convergent evidence is sought regarding the facts and conclusions for the case. Each case's conclusions are then considered to be the information needing replication by other individual cases.

Strauss and Corbin (1990) have commented on criticisms of this type of approach made by those engaged in quantitative research methodologies. The authors suggest this results from the inappropriate application of quantitative research norms to qualitative methodologies. This criticism, they suggest, has been that data collection in qualitative methodologies yields data that is non-comparable because not all objects are asked exactly the same questions. Strauss and Corbin's (1991) response to this is that the data are comparable in terms of their representativeness of concepts - that is how the data relates to the theoretical framework.

The literature drawn on for the purposes of the development of this study's theoretical, or conceptual, framework included that on organisation culture, organisation structure and function, strategy and its relationship to learning, learning and continuous innovation in organisations as a process of continuous change management. It also included that on conflict and difference management, the issue of diversity, leadership and membership roles, governance, politics and accountability.

The work of Argyris (1999) on the learning relationship between the individual and the organisation, and Habermas (1987) on 'communicative action', provided the context within which to review the literature. These provided a framework for the consideration of the issues inherent in developing meaningful communication, communal decision making / reflective or dialogical processes and their relationship to organisationally strategic change and learning.

Following a review of literature, and a statement of propositions building on the literature review (stated in the concluding section of the literature review), six hypotheses (Cooper and Emory 1995) were suggested related to the relationship between membership participation, organisational learning and strategic change in democratically structured voluntary organisations. The are:

- The lower the level of participation of a diversity of organisational members / actors in the strategic development functions of voluntary, democratically structured organisations the more such an organisation will suffer from learning and strategic dysfunction. The corollary is also true.
- The more organisational culture inhibits organisational participation of a diversity of organisational members / actors in the strategic development functions of voluntary, democratically structured organisations, the more organisational culture impacts negatively on the development of organisational learning and strategic capabilities in such organisations. The corollary is also true.
- If organisational initiatives addressing these participation and strategic learning difficulties in these types of organisations are to succeed, the focus of the initiative must

be change at a systemic organisational level rather than at a non / under participating individual member or group level only.

- To be successful, these change initiatives must address the effects of organisational culture on how and when the membership are involved in the organisational strategy development cycle particularly through its impact on:
  - Communication
  - Management of internal conflict / difference
  - Organisational leadership, representative and membership roles.
- In order for these change initiatives to be successful, specific and congruent arrangements for the management of systemic change, and a timeframe for its completion, must be put in place by the organisation.
- In addition to increasing effective membership participation, change initiatives of this type will increase the learning and innovative capacities of voluntary, democratically structured organisations.

As Cooper and Emory (1995) have suggested, an hypothesis must be capable of being 'tested'. Given the nature of the processes under review in this study, this necessitated the development of an instrument that would:

- Reflect the theoretical framework being employed in the study;
- Enable the gathering of data according to the categories required (discussed above);
- Enable analysis of the data gathered such that it could be tested.

Therefore, the Input Output Analytical Model described in chapter three and discussed earlier here was devised in order to undertake this study. This enabled the definition and framing of investigative and measurement questions, and the data sources to be used.

Subsequently, it also aided the analysis of the data through a process of pattern matching with theory and explanation building. This was achieved through the structuring of the data in the analysis on the basis of the model which was developed and based on the literature review (theory) and the processes outlined in the propositions, hypotheses and research questions outlined in chapter one and two.

In addition to testing the hypothesis and answering the questions, the purpose of the study is to test the use of the model in order to develop a diagnostic instrument or method to enable voluntary, democratically structured organisations to develop their membership participation, strategic change and organisational learning capacities through effective, processual diagnosis. This is within the context of enabling greater effectiveness in achieving the organisational mission and response to environmental challenges.

Five case study criteria were established to aid the selection of three case study organisations. These criteria are:

- The requirement to conform to the International Classification of Non-profit Organisations (Salamon and Anheirer 1996);
- The requirement to conform to the structural-operational definition of voluntary organisations (Salamon and Anheirer 1996);
- The requirement to have a democratic structure;
- The requirement to have experienced difficulties in terms of internal membership participation;
- The requirement to have experienced a turbulent and rapidly changing external environment impacting on the long term success and survival of the organisation.

During the period December 1998 - May 1999, three organisations complying with the criteria were identified and invited to participate in the study. They agreed to do so. The organisations differed in terms of age, size, structures, complexity and mission. This



enabled the study hypotheses and questions to be explored in varying contexts within the criteria established. This approach enabled the prediction of similar results or contrasting results but for predictable reasons. The approach facilitated the statement of conditions so that generalisation to further cases could occur (Yin 1994). This was facilitated by the comparisons made possible through the utilisation of the model when gathering, structuring and analysing the case study data in each instance.

Specifically, the case study organisations belonged to groups four, nine and eleven of the International Classification of Non-profit Organisations. The case study organisations are:

- The Irish National Teachers Organisation (a trade union);
- The National Youth Federation (a federation of independent regional youth service organisations);
- Concern Worldwide (a development aid and advocacy organisation).

A protocol for carrying out the research within each of the case study organisations was agreed with the senior member of staff and the designated liaison person within the organisation - where this was another person. It included an overview of the case study project, field research procedures, the key case study questions and the likely research sources related to each of these. The existence of negotiated protocols decreased the levels of anxieties of the organisations in engaging in the research and increased the level of access granted to the researcher.

The research methodology adopted allowed for the utilisation of a number of complementary sources of data that were pertinent to the study. These included:

- Documents

- Archival material
- Direct observation
- Tape-recorded (audio) open-ended interviews
- Survey by written questionnaire.

These reflect the sources identified by Yin (1994).

As discussed above in relation to Strauss and Corbin's (1991) approach to qualitative research, the use of the various sources of data was not uniform in each organisation. This was a result of the varying sources available in each instance, and the information gathering and maintenance systems within each organisation historically. The specific sources utilised in each of the case study organisations are listed in the case study descriptions. This is consistent with the multiple case study method outlined by Yin (1994).

Of the six possible sources of data indicated by Yin (1994) for the purposes of case study research, four were used: documentation, archival records, interviews and direct observation. The methods utilised enabled 'rich' data to be gathered in terms of its breadth and depth. It also enabled data from one source to be confirmed by another and so result in convergent lines of enquiry (Yin 1994). The use of this variety of data sources helped to overcome potential issues in establishing the construct validity and reliability of the study. The data was collected during the period of April 1999 - May 2001.

A record was kept of the research project and the questions that arose at each point. In particular, details of the procedures undertaken, who and what was involved, what occurred and when, issues that arose and what stimulated them were noted. This was undertaken to facilitate review of the study and comparative studies to be undertaken in other organisations. This data were compiled in chronological order into a 'database' document in the instance of each case study. This allows for the replication and testing of this research through further case studies. The establishment of the database also enabled the evolution of

the organisations to be traced in terms of the themes identified as pertinent in the literature review. In particular, it allowed for the use of the Input Output Analytical Model to be utilised in the process of analysis as well as data gathering through the analytical strategy of pattern matching and explanation building. The database also enabled the full detailing, convergence and referencing of all the data utilised in the case study descriptions. Such referencing proved difficult in the case study reports contained in the thesis volume due to length considerations and in terms of the accessibility of the study to the reader. The case study databases are referenced at the beginning of each case study report and are available from the author.

The framework provided by the literature review in terms of the provision of a framework for a process of pattern matching and explanation building was the analytical strategy chosen. This enabled the identification of causal links, a systems perspective to be adopted, and the consideration of this within the context of the literature. This involved a process of pattern matching utilising the Input Output Analytical Model proposed in this study and as discussed and described in this chapter and in chapter three.

The case study data was ordered by theme according to the theoretical-based Input Output Analytical Model. In turn, these data were ordered both by theme and chronology combined. This was undertaken in order to provide both diachronic and synchronic access (Pettigrew 1985) - essentially chronological and systemic access. This clarified the patterns of evolution of membership participation, organisational learning, strategic change and the factors impacting on these developments, and their inter-relationships, within the case study organisations during their evolution.

This approach to the research methodology aimed to ensure the construct validity, internal validity, external validity and reliability of the research process and results. In particular this was achieved by:

- The use of multiple sources of evidence in the data collection phase;
- The establishment of a 'chain of evidence' in the data collection phase;
- The liaison contact in each organisation reviewing the draft case study description;
- Explanation building during data analysis through a process of pattern matching with the theoretical framework established through utilising the Input Output Analytical Model at a systemic level (individual case study analysis in chapters five six and seven and in the general analysis in chapter eight). The matching of individual patterns with individual dimensions of the organisational processes observed (chapter eight) was also undertaken. In the instance of each case study organisation, a critical incident approach is also provided in order to indicate the impact of the organisational dynamics considered here on organisational ability to respond effectively to environmental challenges (chapter eight).

External validity establishes the domain to which a study's findings can be generalised. As this was a multiple case study that did not simply replicate an earlier piece of research in a new domain, this objective was achieved by comparing the case study findings with other studies that concerned particular aspects of participation, organisational learning and strategic change in organisations.

The reliability of the case studies have been ensured by:

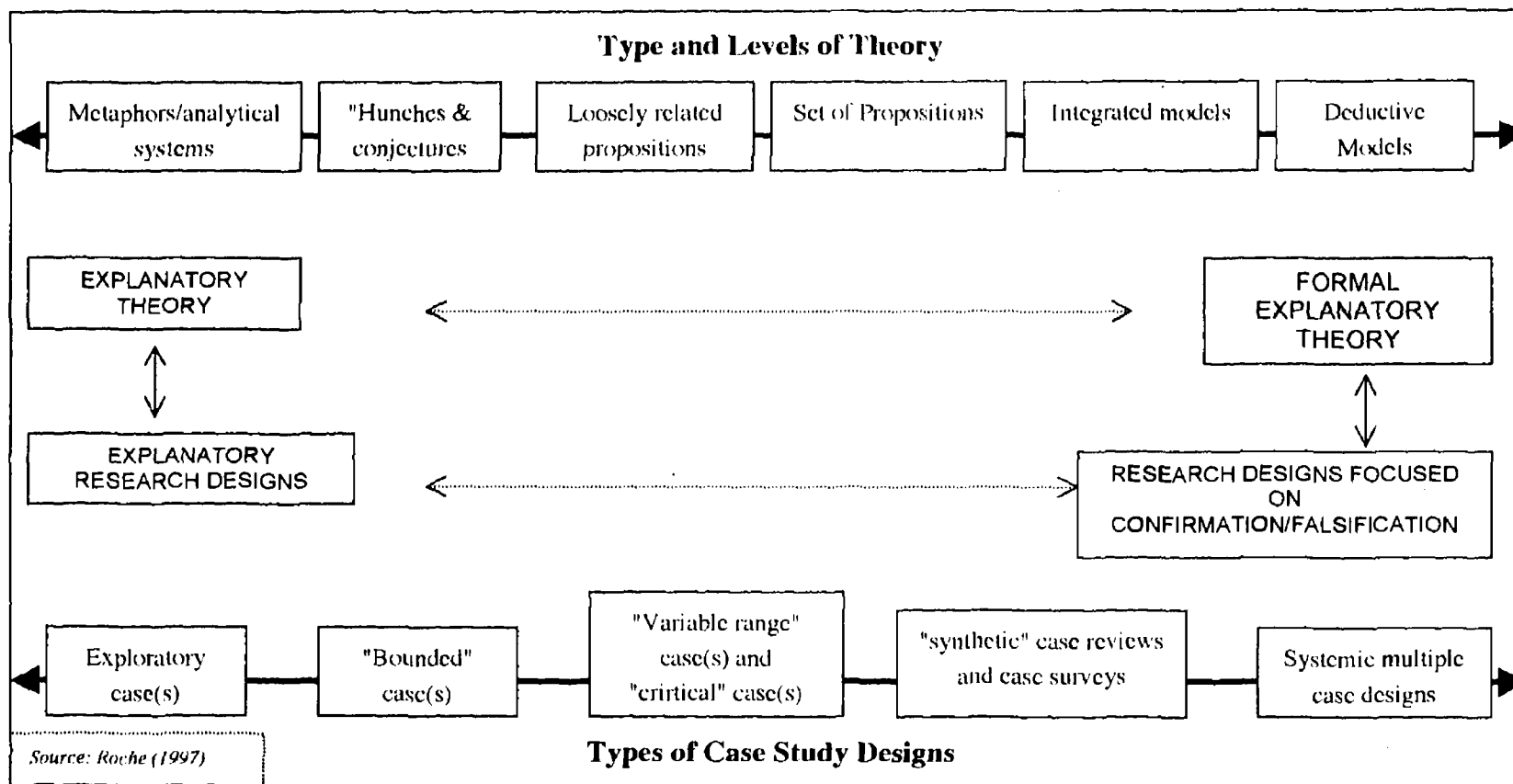
- The use of a case study protocol during data collection;
- Developing a case study database during the collection of the data.

The quality of the analysis has been assured by attempting to:

- Include all relevant evidence;
- Include major rival interpretations;
- Addressing the most significant aspects of the case study.

The study results in an integrated model seeking to explain the dynamics of the issues under review. As such it moves towards the suggestion of a formal explanatory theory of the relationship between strategic change, organisational learning and membership participation in democratically structured voluntary organisations (see Exhibit 15).

**Exhibit 15 The Relationship between Theory and Case Study Design**





Some of the main criticisms related to the use of a multiple case study methodology include the following.

The first is that case studies provide little basis for scientific generalisation. This relates to the discussion earlier in this chapter regarding the importance of a theoretical framework in undertaking case study work. This allows for generalisation to the theoretical base and representivity to be established in this way. It also enables the replicability of the studies.

The utilisation of a narrative approach may be criticised on the basis of being 'anecdotal' - and non-scientific as a result. In fact, Silverman (2000) has specifically suggested that qualitative researchers, particularly those using case study methodologies, should reject such assertions on the basis that the methods can be applied to large scale data sets and "standard issues of 'replicability' can, in part, be addressed by systemic transcription of data" (Silverman 2000: 283). Such transcription, however, can lead to extended documents as a result of the length of narrative required.

Assertions that qualitative research is anecdotal is to misunderstand at a fundamental level the nature of case study research in terms of establishing 'facts' through convergent lines of inquiry, a process of 'triangulation', as outlined earlier. It is also to misunderstand the nature of the phenomena under investigation and the importance of tracing the interrelationships over time as outlined above.

This issue relates to the second criticism often made of case studies. This refers to the length of case studies and the possibility of the research resulting in "massive, unreadable documents" (Yin 1994: 10). This was a problem encountered in the first draft of this study given the variety of processes being investigated, the variety of data sources required, their inter-relationships and the organisational time frames over which they were traced. Yin (1994) has suggested a number of strategies that can be applied to overcome this problem.



The approach adopted in this thesis has been a combination of two of these. This involved a multiple case report containing multiple narratives presented as separate chapters and in addition a chapter covering the cross-case analysis and results - contained in chapters five to eight (Yin 1994: 134). Yin also suggested an approach involving a 'narrative' "based on a series of questions and answers in the case study database" (Yin 1994: 134). The Input Output Analytical Model has been utilised in this way in this study in the structuring of the case study reports. The structure of the model reflects the question metrics outlined in chapter three. Given the nature of the data, their systemic interrelationships and the tracing of their evolution over time, the reports within the Input Output Analytical Model structure of necessity take a narrative form. Given that similar information is required in response to some sections in each report, by necessity there is a level of repetition. However, not to address each section (or question metrics) in the model would have undermined the purpose of the model and the applicability of the theoretical framework.

It should be noted in this context that case study data of their very nature, and particularly in a study such as this one, relate to real time and space and cannot be separated from their organisational environments when the data are being gathered, structured or described. The research subjects or data cannot be 'isolated' as may be possible in other research methodology.

This case study data characteristic led to the other two difficulties outlined above in terms of the perception of the work being 'scientific' - which as has been stated relates to the issues of relationship to theory and unwieldy documentation. The first issue was dealt with by the utilisation of the Input Output Model. This is the bridge between the theoretical framework and the data collected when looking at the case study organisations as systems. It was also dealt with by specific matching between particular data and particular parts of theory. Both were processes of theoretical and data pattern matching and enabled representivity and replicability to be achieved.

The difficulty in dealing with the latter issue in this study has been described. Part of the process required a degree of synopsis of the data due to issues of length of the case study reports. This approach left an outstanding issue. That was the importance of demonstrating how convergent lines of inquiry (Yin 1994) were utilised in establishing the 'facts' - the 'narrative' - and providing the reference base for this in the text. To include this information in the actual body of the thesis would have created an inaccessible document for the reader since each point would have required between at least three and six references to be noted. Therefore, the approach outlined above was adopted in addition to the availability from the author of the case study databases with all detail and references. A list of all data sources utilised in the development of each case study has also been provided in each of the case study reports as is specific reference to the case study database document - in which the specific references for each point made are located.

**Chapter Five: Case Study Report 1:  
The National Youth Federation**

Given the danger of unwieldy case study reports as discussed in chapter four, the approach adopted relates to a combination of two strategies proposed by Yin (1994) to counteract this problem. These were also outlined in the previous chapter. In addition, the case study database is available from the author. This provides all evidence of triangulation, or the use of convergent lines of inquiry, to establish the 'facts'. All such detail is fully referenced to the data sources used. A comprehensive list of the data sources is included in the database, as it is below. For detail of all points made in the case study report, reference should be made to the case study database. The format of the report is in narrative form. This conforms to standard methodological practice in terms of case study research methodology and is, in fact, a necessary structure in order to promote an understanding of the evolution and the interconnections between the dynamics under review - the chain of evidence. This was discussed in chapter four.

As discussed earlier, the importance of theory in both case study and qualitative research methodology has been highlighted by Yin (1994), Strauss and Corbin (1991) and Pettigrew (1985). This relates to the importance of theoretical context for case study and qualitative research in terms of enabling replicability and representivity - its 'scientific' basis as discussed in chapter four. The Input Output Analytical Model, proposed in this study, has been utilised in the preparation and structuring of this case study report. The model has been developed on the basis of the key themes emerging from the literature review and directly relates to the study's propositions, hypotheses and research questions - in addition to the question metrics attached to the model. It emerges from and is fully grounded in the study's conceptual framework. It has been the instrument guiding the collection, structuring and analysis of the case study data. The approach, therefore, meets the conditions regarding theory in the development of this case study as outlined and discussed in chapter four

The data sources used in the development of the National Youth Federation Case Study have included:

**1. Archival Documentation and Records:**

- Board Minutes 1985-2000
- Finance and General Purpose Sub Committee Minutes 1995-2000
  
- Annual General Meeting Minutes 1984-99
  
- Annual Reports 1989-1999
  
- Financial Report 1998
- Financial Statement December 1999
  
- Memorandum and Articles of Association (1996)
- Constitution (1988)
  
- National Plans 1993/94, 1994/95, 1995/96, 1996/97, 1997/98, 1998/99
- Draft Strategic Plan 1998-2003
- Draft Strategic Plan 1999-2004
- Draft Strategic Plan (final) 1999-2002
  
- Drafting a Strategic Plan : Board Discussion Document (1998)
- Strategic Plan 1999-2002 : Time Scale for Completion (1999)
- Draft Template for Operationalising the Strategic Plan 1999-2002 (1999)
- Possible Actions to meet strategic aims: Co-ordinating Team April and May (1999)

- N.Y.F. Generic Services (Board Document 2000)
  
- Local Development Planning Pack: Parts 1 and 2 (1998)
- Local development Planning Progress: Update and Overview of Local AGMs (May 1999)
- Local development Planning Process: External Environment Update (May 1999)
  
- Board Members' Briefing Pack 1997/98
- Board Attendance: June 1998-April 1999 (May 1999)
- Overview Board Membership 1997-2000 (May 1999)
- Memorandum from Chief Executive to Board Members regarding Annual General Meeting Review and Follow-up (June 1999)
- Board Overview (November 1999)
  
- NYF Annual Assembly Evaluation Questionnaire (May 1999)
  
- Membership Application: Monaghan (May 1999)
- Membership Application: Cork (November 1999)
- Consultant's Report: Cork Membership Application (June 1999)
  
- Federal Personnel System Working Group : Terms of Reference (June 1999)
- Memorandum to Board Members from the Assistant Chief Executive regarding the Personnel / Staff Handbook (June 1999)
  
- History of the National Federation of Youth Clubs (N.F.Y.C. 1987)

- Hurley L. (1992) Irish Youth Work Policy: Unresolved Issues. Youth Work Discussion Papers No.1  
Dublin: Irish Youth Work Resource Centre, N.Y.F.
- Hurley L. (1992) The Historical Development of Irish Youth Work. Youth Work Research Series No.1  
Dublin: Irish Youth Work Resource Centre, N.Y.F.
- Hurley L. (1994) A Study of Volunteer Youth Activity within the N.Y.F.  
Dublin: Irish Youth Work Resource Centre, N.Y.F.
- Murphy T. (1995) In Search of a Strategy  
Unpublished Paper
- Murphy T. (1995) The Voluntary Organisation - Not For Profit So For What?  
Unpublished Paper
- Treacy D. (1999) Current Strengths - Future Challenges  
Keynote Address, N.Y.F. Assembly, Ennis
- Draft (3) Model Local Youth Service (March 1999)
- Memorandum to Regional Directors and Chairpersons from the Assistant Chief Executive regarding the Draft Child Protection Policy Consultations (October 1999)  
Draft Child Protection Policy (November 1999)

- **Results of Questionnaires: Member Youth Services' Use of Arts and Creative Work**  
Jim Cathcart, Ace Project N.Y.F. (May 1999)
- **Consultation Document Towards the Development of Volunteer Development Policy**  
N.Y.F. (May 1999)
- **Draft Volunteer Development Policy**  
N.Y.F. (November 1999)
- **Development Through People: Conference Report**  
N.Y.F. (November 1996)
- **Partnership and Beyond: Conference Report**  
N.Y.F. (February 1998)

## **2. Survey by written questionnaire**

Survey of the total membership (10) of the N.Y.F. Board (2000). This was distributed by the Chief Executive and returned during April - May 2000. There was a 100% response rate. The respondents included both the President and President Elect. The latter data was also analysed separately.

## **3. Direct observation:**

- A meeting of the national Board (June 1999)
- National Assembly and Annual General Meeting 1999 parts 1 and 2 (May, November 1999)

#### **4. Audio Tape Recorded Interviews**

- Mr Tony Murphy, N.Y.F. Chief Executive Officer (1997-2002)
- Mr John Dunne, N.Y.F. General Secretary / Chief Executive Officer (1989-97)
- Mr David Treacy, N.Y.F. Assistant General Secretary (c. 1985-1991)
- Ms Louise Hurley, N.Y.F. Ex-Development Officer / Manager Youth Resource Centre / Researcher (1988-1999)
- Mr Fran Bisset, N.Y.F. Assistant / Manager Irish Youth Work Resource Centre (1990-2002)
- Mr Arthur Dempster, N.F.Y.C. National Treasurer (c.1969-1974)

Interviews with a number of other members of staff / regional directors / volunteers were also requested but were declined.

All of the data gathered, structured according to the chronological development of the organisation, is included in the case study's database. All points made in this case study report are fully referenced by data source in the database. The references to the National Youth Federation Case Study Database that provide access to the more specific references listed above are:

N.Y.F. Input Output Analytical Model Part 1: N.Y.F. Case Study Database pages 2-5, 176-189;

N.Y.F. Input Output Analytical Model Part 2: N.Y.F. Case Study Database pages 5-46, 127-177, 190-200;



### **Summary of the Case Study Analysis**

The key issues that emerge in terms of the relationship between membership participation, organisational learning and strategic change - and therefore their impact on the effectiveness with which the organisation mission could be achieved and environmental challenges responded to - in the National Youth Federation are the following.

The culture of leadership at the apex of the organisation, and at the apex of the regionally based member organisations, emphasised centralised authority and control. This had consequent implications for the development of a sense of ownership of the organisation among other groups. It also had implications for the management methodology that was applied to, and the roles assumed by, other organisational actors. During the second period reviewed (Input Output Model Part Two), the mission of the organisation and the philosophical basis for this evolved such that it was in conflict with the established, unspoken, culture of leadership and use of power. Subsequently, both appear to have operated in tandem resulting in, what appears to have been, a culture clash in espoused theory and theory in use within the organisation - particularly at very senior levels. As time passed, there was an increasing absorption with the current realities facing the organisation rather than its future vision and the development of its external environment. The organisation became 'insulated' from its environment and from significant groups in membership of it.

This situation resulted in an increasing use of informal power and influence and non-organisationally strategic political behaviours. This influenced the norms of behaviour in relation to conflict and difference management and communication. It encouraged a fear of

participation in formal processes and structures among some groups, and the increasing non-strategic influence of informal friendship and other networks - often controlling key resources in the organisation.

Ultimately, the representative structures were weakened, particularly in terms of the lack of cohesion at national level among members of the Board, and National Office staff. There was a lack of commonly held vision. The levels of engagement in the strategy processes were reduced, as were the quantity and quality of sources of environmental information and reflection. The operation of the democratic processes and structures in the organisation reflected this situation and culture. They did not act as a balance to it.

The change strategy adopted in the final period sought to address these issues (Input Output Model Part Three). The levels of success it achieved can be attributed to the cultural boundary spanning capacity of the Chief Executive of the time. The timing of the change project, and its resourcing, however, had implications for its ultimate success and the survival of the organisation. This was such that by the time the organisation embarked on an effective change strategy, it may have been too late. This reflects the preoccupation with current rather than likely future realities that developed at an early stage – a lack of future vision and insulation from the external environment and likely future environments.

It is suggested that this situation can be attributed to the insulating effect of the organisational culture, particularly in relation to the norms of senior leadership and their impact on general participation in the strategy cycle. This caused a serious learning dysfunction within the organisation impacting on its ability to engage in strategic change in a timely fashion in response to environmental challenges impacting on its ability to effectively achieve its mission on an ongoing basis.

In terms of the study's hypotheses and research questions, the following has been found in relation to the National Youth Federation.

The under or non-participation of certain groups of members in the strategic development functions of the N.Y.F. can be understood as a symptom of an organisational (system) learning dysfunction.

The process by which the dominant organisation culture in the N.Y.F. was established and maintained provides an explanation for the existence and perpetuation of such participation difficulties and learning dysfunction within it. This relates to the impact of this organisational culture on the participation patterns of a diversity of organisational members / actors in the strategic development functions of the organisation.

The organisational initiative which appeared to have had a chance of success in addressing these participation and learning difficulties in the N.Y.F., had as its focus change at a systemic organisational level rather than at a non / under participating individual member or group level only.

This change initiative addressed the effects of organisational culture on how and when the membership were involved in the organisational strategy development cycle particularly through its impact on:

- Communication
- Management of internal conflict / difference
- Organisational leadership, representative and membership roles.

However, the emergence of a significant environmental threat in terms of Government policy may impact on the long-term success of the change strategy in these respects. The threat could have been anticipated by the organisation but was not as a result of an historical, internal organisational learning dysfunction.

Specific and congruent arrangements for the management of this systemic change, and a timeframe for its completion, through the statement of the time frame for the strategic plan, were put in place by the N.Y.F. However, as suggested above, this may not have occurred in sufficient time to secure the long-term survival of the organisation.

In addition to increasing effective membership participation, this change initiative increased the learning and innovative capacities of the N.Y.F. as evidenced by the increased ability of the organisation to engage in environmental scanning and reflection, policy and strategic development and change, owned increasingly by the membership as evidenced by its level of engagement. This was a slow process however, and may not have been sufficiently timely to ensure the survival of the organisation as already suggested.

**Input Output Analytical Model (Part One):      The development of organisational culture at the foundation of National Youth Federation**

**Input: Profile of the founding membership**

The organisation was established in 1962. The Limerick Council of Boys Clubs initiated it. The Council organised a conference to which representatives of boys' clubs nation-wide were invited. Following this, a committee was established. The committee was largely drawn from the Limerick based conference organising committee. Its role was to investigate the possibility of establishing a national organisation. It engaged in a consultative process. Subsequently, the resulting proposals were presented to a general meeting.

During the period 1962-1968, leadership of the organisation was all male and strongly Catholic in ethos. At least 50% of the membership of the National Executive Committee was either diocesan priests or members of religious orders. The prime movers asserted the control of the Catholic Church. For the first ten years, the President was a priest from Limerick, and from the Limerick city based Council of Boys Clubs. He was concerned with ensuring Catholic control of the mission and operation of the organisation.

For the first decade, the most constant and strongest regional representation on the National Executive Committee was from Limerick and Wexford.

**Decisions Regarding Structures, Rules and Procedures**

The following decisions were made regarding the formal operation of the organisation.

It was named "The Federation of Catholic Boys Clubs". It held an annual general meeting. It had a three-tier structure. The basic unit of membership was the local boys' club. Each club

could send four delegates to the organisation's Annual General Meeting. Diocesan Councils constituted the middle tier. Their role was to co-ordinate the work of the local clubs at diocesan level. The councils had no voting rights at the organisation's A.G.M. The National Executive Committee was the top tier of the organisation. It had sixteen members. There was also a four member Officer Board. The Executive Committee was elected at the A.G.M. It met every two months. It established administrative procedures and affiliation fees.

A constitution was adopted by the organisation. Each club was required to have

- Suitable premises
- Suitable number of appropriate age members
- A Catholic chaplain
- An adult committee.

The Constitution laid down the Catholic ethos of the organisation and how it should take effect. Prayers were said at each club meeting. Each club had to have a Catholic Chaplain - he had the right to attend the organisation's A.G.M. This practice was extended to the National Executive Committee when the first President of the organisation stepped down. He became the National Executive Committee Chaplain. The practice stopped when he retired from this position in the early 1970s.

Any changes to the Constitution had to be approved in advance by the Catholic Hierarchy. The Catholic Bishop of Limerick was the Patron of the organisation. All National Executive Committee members were required to get a letter of approbation from their Catholic diocese. Each boys club had to inform their local Catholic bishop of developments in the club.

## **Behavioural Norms - Communication, Conflict / Difference Management, Formal / Informal Organisation Roles**

During its early period (1962-1968), the organisation experienced severe difficulties in terms of participation. There were complaints from club leaders regarding lack of communication with the national organisation. It was difficult to get a quorum at National Executive Committee meetings. It was also difficult for the national organisation to establish relationships with local clubs due to lack of resources.

For a period of one year, a National Co-ordinator was appointed (a Franciscan Priest). He hoped to develop the role of the diocesan councils, without much success. It is unclear why he left the position.

There was a significant degree of conflict, it seems. This was between the National Co-ordinator and the President of the organisation. There were differences in their overall vision for the future of the organisation. This included the issue of including gender mixed clubs. These were informally already in membership as, for example, all clubs in rural areas of Limerick were mixed. There was no formal recognition or acknowledgement of this however.

The operation of the organisation was funded by the personal contributions of individuals involved in undertaking particular pieces of work, or by religious orders / the Catholic Church. This was particularly through the provision of resources in kind. Some funding came from affiliation fees. There was no external funding of the organisation. Some advertising was sought for the organisation's magazine. Therefore, the organisation operated under severe resourcing restrictions impacting on its level of activity in all respects.

It appears that there was limited communication within and between the various structures of the organisation. This was a source of frustration for local clubs but it was not responded to largely due to resource limitations. Little 'dialogue' occurred. Attempts at

national level to engage in systems thinking, future orientation or policy-making / policy changing resulted in adversarial, destructive conflict between the President of the organisation and the National Co-ordinator. Centralised, decision-making power appears to have resided informally with the President and was used as a means of control within the organisation. This was based on his view of the organisation and its role in society. Challenges to this were not tolerated during the founding period.

The role of central leadership was, therefore, defined informally as the sole authority, source of knowledge, vision stator and guardian of the organisation's mission. It was not defined in terms of 'social architect', 'enabler', 'facilitator', 'teller of truth regarding current and future realities' or as 'knowledge integrator'. Leadership was essentially seen to originate at the apex of the organisation, other leadership roles appear to have received their mandate from here and were dependent on this. As a result, the concept of 'representative' was not strong despite the organisation's democratic structure. The role operated as part of an elite. The 'representative' was not engaged in boundary spanning or 'translating' between different groups. Those elected to the National Executive Committee shared the profile of the central and founding leadership. This was male, Catholic and largely clerical.

The membership was seen by the central leadership largely as a passive organisational resource to achieve the mission of the organisation. The membership was defined narrowly as male by the central leadership. In reality, however, this was not adhered to - though this was not formally acknowledged. When acknowledgement of the diversity existing within the organisation, and the need for diversity, was attempted by the National Co-ordinator, it resulted in destructive adversarial conflict. It is unclear whether this in turn resulted in the National Co-ordinator terminating his involvement. He did, however, leave the organisation after a year.



**Output:       Patterns of organisational participation and their relationship to the formation of organisational culture**

The evolving organisational culture precluded general and open 'participation'. It appears that one of the main purposes of the formal aspects of the culture was to ensure the control of the central leadership. Innovation, alternative leadership or change within the organisation required the permission of the Catholic Church. In institutional terms, whilst this may have been a de facto passive, external influence on many occasions, the senior leadership of the organisation ensured that this was a consistent approach during the founding period.

This was in the face of severe participation difficulties being experienced by the organisation in undertaking its formal business, and complaints regarding levels of communication from local level. This indicates that the approach and culture in evidence limited the sources of information available to the organisation, and particularly the reflection and analytical processes within it. The evidence suggests that this related in particular to the culture of leadership in operation at a senior level. This emphasised the role of senior leadership as the source of knowledge, interpretation and authority.

It would be wrong, however, to suggest that all the organisation's difficulties resulted from cultural factors. The severe lack of resources was a major hindrance. This impacted on the development and maintenance of programme. It also impacted on the payment of volunteers' expenses, the employment of development or administrative staff to support the work of clubs locally and the organisation at diocesan and national levels, and the development of a sense of shared 'community' within the organisation.

The organisation's response to its participation difficulties during this period was greater commitment to its original vision and strategy. There does not appear to have been an initiative to engage new energy, leadership or vision to address the problems experienced. In fact, when the National Co-ordinator proposed an alternative, destructive conflict

resulted. The problems of the organisation worsened as time passed. By 1968, the organisation appears to have been virtually defunct.

It seems that the main block to acknowledging and dealing with these difficulties was the leadership culture and influence at senior level - from the inception of the idea of establishing the organisation through its operation until the late 1960s. Whilst the lack of resources was a debilitating factor in enabling the development of the organisation, the heavy emphasis on controlling development and leadership impacted on the possibilities of developing strategy to address the issues arising. It ensured that the level of involvement was severely limited in all aspects of strategic development and evaluation. Ownership of the organisation was only experienced at the organisational apex.

**'Input output' Analytical Model (Part Two):      The development of the  
learning capacity of the  
National Youth Federation**

**Input: Profile of membership**

In the late 1960s / early 1970s, the membership of the National Executive Committee was rejuvenated by the influx of a new group of clerics and religious (with one exception) who had been recently professionally trained in England as youth workers. They had been meeting informally to try to provide a support structure for themselves. They then heard of the existence of the organisation and became involved. During this period, the membership of the National Executive Committee continued to consist of c.50% religious personnel or clerics. There was always a male majority on the committee, although women began to take up membership as the decade wore on.

The position of President was occupied by a man for the entire period and for six years the position of President was also held by a priest.

The regional representation of Limerick was greatly reduced. Wexford maintained its level of representation at three until 1976 when it was also reduced.

The basic membership unit became regional councils to which local clubs affiliated. The number of councils grew from nine to sixteen during the decade.

The organisation formally became non-denominational.

The organisation opened membership to both girls clubs and mixed gender clubs.

Through the programme adopted by the national organisation, young people (club members) became involved in the organisation through conferences / events and training. They appear to have developed a sense of ownership of the organisation. For much of the period, leaders (adult volunteers, mainly women) at local level had little opportunity to engage with the organisation through training or other events and so did not develop the same levels of participation, involvement or ownership of the 'national' organisation

Between 1980–1988, the number of religious personnel and clerics on the National Executive Committee reduced to zero (from a previous low of 3/14). Men remained in the majority on the Committee. Lay people consistently occupied the position of Chairperson (formerly known as President). A number of the young people, who had participated in Members' Conferences the decade before, were elected to the National Executive Committee. In the early 1980s, one (from Wexford) was elected Chairperson and then later was appointed General Secretary of the organisation.

There was reduced regional representation. Limerick was rarely represented, Wexford was consistently so and generally with more representatives than other regions.

The basic membership unit was still the regional council, although generally referred to as local or regional youth services. Local clubs were affiliated to these.

'Key' regional directors were informally consulted by the General Secretary (part of an established friendship network, reflective at least to some extent of the leadership group of the 1970s). Members of staff at National Office, including senior members, were often not involved in this informal consultation process.

Adult volunteer leaders became increasingly less involved with the national organisation. Their focus was the regional organisation to which their local club or project was affiliated.

The relationship between regionally based staff and the national organisation was the most significant relationship between these tiers of the organisation. Such members of staff were often the main communication link within the organisation – although this was often an informal one.

Towards the end of the decade, a new constitution was adopted. This altered the representative basis at national level. A number of 'constituent bodies' were established. These sought to be reflective of the variety of youth work interests that were involved at this stage. They included a Youth Forum (the successor to the Members' Conferences), the National Youth Club Council (representing the traditional youth work with which the organisation had been engaged), the Special Youth Services Forum (reflecting new types of youth projects), Council of Local Youth Services (reflecting the regional youth services / councils), Staff Forum. Each of the fora had rights of representation on the National Executive Committee. Regional councils were mandated to send delegates who were involved with the regional youth service to each fora. There was, therefore, no longer any direct regional representation on the National Executive Committee, all came from intermediary or mediating structures.

In 1989, a new Chief Executive was appointed. He had had no previous involvement with the organisation. His own youth work background had been as a volunteer with the Scouting Movement. The movement had an alternative ethos to that stated by the National Youth Federation. He had not worked in a professional capacity in the voluntary sector before.

As mentioned earlier, representation on the National Executive Committee consisted of representatives from the various constituent bodies including the Staff Forum. There was no direct election by the regional youth services to the committee. During the period 1989-97, the number of male representatives reduced from 9/13 to 4/11 with a consequent

increase in the number of women. Until 1995, a cleric occupied the position of President – for the first time since the 1970s. For the remainder of the period, a woman was elected to the position - having been elected to the Board by the National Youth Club Council.

Within a couple of years, the Chief Executive had incrementally removed development and administrative resourcing from the representative fora. The result of this was that the Youth Forum became defunct. This essentially terminated a national programme that had commenced with Members' Conferences of the 1970s. Similar programmes at a regional level had not become established in the intervening period. The approach to developing the Youth Forum had aimed to achieve this but, due to the removal of staff resources, this did not occur.

Similarly, resourcing was removed from the National Youth Club Council. Although this continued to have an existence, its potential for development was undermined. This was the main representative forum for adult volunteer leaders in the organisation.

The Special Youth Services Forum never operated as a formal entity. The participation by regional youth services at meetings was poor. It existed as a series of seminars over the years - its role taken over to a degree by the establishment of the Irish Youth Work Resource Centre in the N.Y.F.

The Staff Forum became defunct once the organisation was incorporated. This precluded staff representation on the National Executive Committee.

The Council of Local Youth Services was the only constituent body consistently resourced at significant levels. The senior fulltime management of the organisation were its supporting staff.

One of the effects of this management approach to the constituent bodies was the difficulty experienced in getting people to go forward for election, particularly as in a number of instances there was no fora or channel for election.

The culture of the organisation had meant that staff particularly at regional but also at national level, had been significantly involved in discussions related to the strategy and development of the organisation. This may have resulted from the fact that many of the innovative 1970s leadership group had themselves been engaged in professional youth work development in their own regions. At this point, much of the involvement of staff in this discussion was linked to power 'games' and narrow, political behaviours that were evident in the organisation. The Chief Executive of the time reported that he often found that, at regional meetings with youth services, he would engage with his staff deployed regionally, rather than senior regional volunteer leaders / management. This was also reflected in the representative structures / meetings and fora at national level.

Over time, the Chief Executive ensured the influence of these members of staff was reduced. He did this through the creation of rules that prevented them from contributing at meetings and acting as representatives of regional youth services. New procedures were also introduced regulating communications and staff meetings at National Office.

During the decade, the organisation became incorporated. The structure adopted essentially removed the vestiges of the constituent bodies that remained. This was despite the fact that these bodies originally mandated many of the Board members. Following incorporation they remained on the Board - no longer with a mandate from any group or regional youth service.

With incorporation, the membership unit of the organisation was the member youth service. A Membership Charter was drawn up outlining the criteria that members had to meet in

order to achieve membership. The existing members had to reapply for membership, demonstrating that they met the criteria. This took a number of years to achieve completion.

The Board membership was now directly elected at the A.G.M. of the organisation.

The Irish Youth Work Resource Centre was established, under strict financial restrictions. This organised seminars and undertook research on pertinent issues for young people and youth work. It was open to non-member youth services and others, in addition to the membership of the organisation.

The Chief Executive resigned in 1997.

### **Communication, conflict / difference management, participation styles and roles**

#### *Structural Context*

A new constitution (1973) containing the following values was adopted:

- An ecumenical vision (formal Catholic ethos removed);
- A democratic and participative approach to decision making;
- Decentralisation;
- The aim of affiliated youth clubs was to enable the social, moral, physical and spiritual development of members in a manner responsive to their own set of needs and opportunities in an area;
- The core value of youth work and experiential learning in the context of social action (including learning through doing and relationship building);
- The promotion of youth work as an educational process.

These were summarised as a 'social education' approach to youth work.



The Constitution established a new structure. The basic membership unit became the regional council. This could either be established at diocesan level or by ten youth clubs coming together to form a council. Local clubs were required to affiliate to these councils. The role of the regional council was to devise suitable programmes and competitions for its area, to engage in fund raising for its area, to develop external relationships with other agencies in its area, and to act as a vehicle for the dispersal of grant aid to affiliated clubs. This required the development of administrative and developmental capabilities.

A decentralised and federal structure was established. Grants to clubs were henceforth to be made via regional councils.

A national council was established, meeting four times annually. Three representatives from each regional council attended the National Council.

A National Executive Committee was set up. It was the employing body of the organisation. It was also charged with the responsibilities of co-ordination and servicing of regional councils, the provision of training and the provision of assistance by trained people. The National Executive Committee met once a month. It also held residential weekends to enable discussion and reflection in the making of policy and other organisational decisions.

More participative working methods were adopted. Subcommittees and working groups were established - for example on International Relations, Research, the Constitution, Regional and Club Grants, Training. These were all under the auspices of the National Executive Committee.

The organisation was renamed the National Federation of Youth Clubs.

Saying prayers / club chaplains and other vestiges of overt Catholicism were removed from the operation of the organisation at all levels. However, much of the strongest leadership, and organisational base, remained within the Catholic diocesan domain.

The organisation's National Office moved to Dublin.

An Executive Officer / Chief Executive role was established. Much of the job entailed the consolidation of regional structures, organising seminars, regional conferences and inter-regional meetings.

Administrative, financial procedures and grant aid criteria were introduced.

Funding for the organisation was secured from Government.

A National Training Programme was established. This was part of a four-year research project on the development of group work. This created a core group of trained trainers.

The numbers of staff employed increased, although they were still small and based at National Office (in 1978 two field officers were appointed).

'Members' Conferences' were organised nationally. Two young people from each affiliated club were invited to attend. These provided the springboard for the greater involvement of young people in the organisation.

Group work methodologies were employed at all organisation events, conferences and meetings.

In 1981, a Special Review Committee was established to review the 1973 Constitution. As a result the National Executive Committee was reduced to eleven members. The aim of this was to achieve more effective decision-making. There was clarification of how the organisation would achieve strong self-managing regional groupings of youth clubs. The National Council now met for four weekends annually. The meetings included a mix of formal business, subcommittee work and social education workshops. There was an effort to seek greater voluntary engagement regionally.

In 1983, a survey was undertaken by the organisation to identify what were crucial issues for the membership. This formed the agenda for the first national plan adopted by the organisation. It was an attempt to develop a new way of making organisational decisions based on a ground-up approach.

In 1984, a new statement of values was agreed. This led to the overhauling of leadership training within the organisation and a critical review of the organisation of youth clubs. In turn this led to a formal review of the operation of the organisation. This looked in particular at the interrelationship of the regions and the national organisation - 'mutual accountability' as it was called.

In 1987, a major consultation process was undertaken. It involved the National Executive Committee, staff and voluntary officers at regional level. It was undertaken with a view to embarking on a 'managed change process'. It resulted in a new vision statement, a club development strategy, a planning and review system. This involved regions co-ordinating various procedures (grant application, statement of objectives for the next year and the year end review).

Following this, the National Executive Committee invited the Review Group to a 'review weekend'. The emerging proposal included a name change for the organisation to the

National Youth Federation, and the identification of three youth work 'strands' to be formally reflected in structural and constitutional changes. Ultimately, these resulted in the creation of a new representative structure involving the establishment of the constituent bodies (S.Y.S.F., Y.F., N.Y.C.C., C.O.L.Y.S. in addition to the Staff Forum). It was stated that this was a means by which the organisation at national level could enable the development of youth work in the organisation beyond the confines of the youth club.

It has also been stated that politically this was as far as the leadership felt it could push change internally within the organisation. In ways, it reflects the divisions emerging between volunteer adult leaders - largely engaged in youth club work - and professional youth workers engaged in emerging forms of youth work.

Parallel to these developments, early in the decade, there was a large influx of new development staff. This resulted from a short-term injection of funding by the Government. The policy was that within a few years the organisation would have to take on the total funding of these positions - and funding to the organisations would be on a descending scale in the intervening period. The staff was employed within a relatively short period. There had been no time to prepare an effective management system. The staff were largely deployed at regional level to support the development of the regional councils / regional youth services.

The regional staff met every two months. The National Development Team (senior staff management) provided basic induction and system support to the regional staff. In reality, each regional staff member had two line managers - one at regional level (a volunteer normally) and one at national level.

The situation was extremely difficult and gave rise to major tensions. There was also a large degree of role ambiguity. In response to this, regional development groups were

established. A Staff Association and a Staff Negotiations Board were also established. Parity with teachers' salaries was agreed. This had significant resourcing implications for the organisation.

As time passed, it became increasingly clear that regions would not be in a position to employ the regional staff directly for some time. They did not, in general, have the organisational capacity to undertake this. Region building had to become the primary task therefore. Club development was delegated to regional club development committees of volunteers, and volunteer adult leaders became increasingly focused on the local situation - if they were not already. The national organisation agreed a contract with the regional youth services. The national organisation agreed to continue to employ the regional staff until such time as the region was in a position to take this over. This required both funding organisational development and human resources development at a regional level. The aim was that this would be achieved within a four-year period - this only occurred in one instance, Ferns (Wexford).

A new Head Office building was purchased - involving the organisation in significant debt.

In 1989, a new Chief Executive was appointed. Following this, a number of significant developments occurred. These were as follows.

*Communication, conflict and difference management, participation roles and styles*

The input of staff employed by the national organisation became highly regulated. At meetings of the organisation, they were only allowed observer status, and not allowed to contribute unless requested to do so. At National Office, communication and the raising of issues became highly regulated through the line management structure. Breaches of procedures were subject to disciplinary action.

This resulted in the input of staff into the formal strategic development tasks of the organisation being significantly reduced. The aim of this management policy appears to have been the reduction of the political influence of staff, particularly at regional level, and the bolstering of the authority and control of senior staff management at national level.

Following the need to make a number of staff redundant, and the implementation of a number of other financial cutbacks in order to cope with the financial crisis being experienced by the national organisation, many regional staff transferred their employment to the regional youth services. This appears to have reduced the levels of adversarial and destructive conflict between these members of staff and the senior management of the organisation.

The advent of incorporation meant that there could no longer be staff representation on the Board of the organisation. This brought to a formal end the practice of worker participation at the apex of the organisation's representative structure. This had been the practice since the 1970s - since the organisation first employed staff.

The rules of procedure and similar processes were underdeveloped in the organisation. For example voting was used as a means to make a decision but there were no rules to govern tied votes. Much work was done in respect of regularising how business was formally undertaken.

With the prospect of incorporation and the introduction of a Membership Charter, an audit of the membership at regional level was completed. The Chief Executive held meetings with each region. The focus in undertaking this was on regional management groups.

Incorporation sought to regularise the corporate structure of the organisation - and its related administrative and financial management. The opportunity was used to create a

Membership Charter to which members (member youth services) of the newly incorporated organisation had to comply before being readmitted as members. This charter attempted to create a minimum set of criteria / standards for the operation of member youth services including their own incorporation and related matters. This process appears to have hindered the development of shared vision rather than helped its creation due to the approaches adopted. In one instance, a former member was not readmitted and it became defunct. Various parties took legal actions. This approach identified a change in the role of the organisation vis a vis member youth services – from being a supportive developmental agency.

The Chief Executive withdrew staff resourcing from a number of the constituent bodies. This was treated as a management decision and was therefore not a decision made by the National Executive Committee – despite its democratic repercussions. This affected the Youth Forum to the greatest degree, ensuring its demise. The Chief Executive felt it was inappropriate for young people to be members of such a senior management group as they were underage and would be precluded by law from being directors of an incorporated organisation.

This approach ensured that, as time passed, there was no channel for the development of leadership among young members as had occurred in the previous two decades, and which had produced a significant number of the volunteer and staff leadership of the organisation during the 1980s. Equally, it ensured that elections to the National Executive Committee panel for Special Youth Services were difficult and that representation from the National Youth Club Council was hampered. Over time this meant that achieving sufficient nominations for election to the National Executive Committee became a problem.

Once incorporation took place, a number of these bodies became subcommittees of the Board - or at least subcommittees of the Board on related issues. Many of these appeared

to be unclear of their roles and ultimately were disbanded. The one on participation - essentially established to replace the Youth Forum - was an example of this.

The new Board of the incorporated organisation had nineteen members reflecting the constituent body make up of the National Executive Committee - plus the addition of three members co-opted to the Board. A number of advisory committees to the Board were established, essentially to replace the constituent bodies. The Board also established a working group on grant aid criteria. This was undertaken in order to enable greater equality and transparency of grant aid distribution within the organisation. In addition a Finances and General Purposes Committee was established. This was akin to an officer board.

The Board subsequently undertook a review of the need for subcommittees. As mentioned earlier, the subcommittees on Participation and International Affairs were disbanded. Those on Special Youth Projects, Club Development and the Council of Regional Youth Services were kept. A Network of International Delegates, a Subcommittee on Board Effectiveness and a Network of Regional Directors were established. The latter was initially established to participate in developing the organisation's response to the publication of the Government's Youth Service Bill.

Towards the end of the decade, strategic planning became an issue for discussion by the Board. This may have resulted from the discussions of the Subcommittee on Board Effectiveness. It was agreed that a weekend Board meeting be held to look at strategic planning in the organisation. No clear responsibility for organising this was assigned which led to difficulties. Eventually, three Board working groups were established to look at three strategic objectives identified.

During the 1970s, a strong collegial / support / friendship culture had developed at National Executive Committee level. The committee displayed large amounts of energy and



commitment in pursuing the development of the organisation, particularly during the early years of the decade. Due to this communal experience, and the working methods including group work and residential weekends, the informal focus on relationships and communication increased at the senior leadership levels of the organisation.

In the early part of the period, a cultural blindness appears to have existed among the dominant group on the committee in terms of the Catholic ethos of the organisation - despite the desire to become an ecumenical organisation and the intention to include non-Catholic clubs in membership. An example of this was the nature of prayers used at committee meetings. Once this was pointed out the practice was acknowledged as being exclusive and was terminated without rancour. This was made possible because one member of the National Executive Committee had an alternative religious profile and cultural experience to the dominant group.

Due to the 'Members' Conferences' and other inter-club activities, strong relationships and a sense of ownership of the organisation developed among the young people who attended. There was a desire among young people in clubs to hear about the organisation and engage with it. Young people became 'politically' involved at A.G.M.s held within the organisation. These involvements enabled the development of 'leadership' opportunities for these young people.

Due to the lack of programme for volunteer adult leaders at local level, the same sense of ownership did not develop among this group. It has been reported that, at times, there was a sense of resentment among this group in regard to the opportunities given to young people in comparison to the lack of opportunities available to volunteer leaders.

When attempts were made to engage this group in training and inter-volunteer exchanges, difficulties arose due to low levels of self-confidence and lack of broader experiences among

the adult volunteers. They tended to listen rather than become involved in discussion. These issues exacerbated the differences that existed in the experiences between those based in urban and rural settings.

There was, therefore, a sense of a growing communication and leadership gap between local volunteer leaders and the more senior leadership of the organisation. This was increased by the sense of distance that resulted when the National Office of the organisation moved from the regions to Dublin, and as a result of the new central role of the regional councils in mediating communication and engagement with the organisation nationally with the change in the basic unit of membership from local club to regional council.

The membership was not consulted about many organisational developments. The membership was not highly organised and the National Executive Committee was very strong – it was the driving force of the organisation in terms of vision and energy. It was also the most coherent group in the organisation due to the strong informal relationships that had developed.

At regional council level there was a lack of continuity among the volunteer leadership. In the main, those councils that were supported by diocesan personnel were growing and were stronger organisationally. This influenced the debate on the need to employ professional staff to support the development of the organisation and youth work within the regions. Increasing tension, acrimonious debate and conflict within the organisation focused on this issue as time passed. No consensus was achieved at National Executive Committee level. Increased grants from Government ended the debate in reality and staff was employed.

Two field officers were appointed in 1978. They were particularly involved in development support work and in training initiatives. These boosted informal communication between National Office and the regions. They increasingly became central

communication and link points in the organisation - with consequent increases in their informal influence.

The new 1970's leadership group on the National Executive Committee had largely left the committee by 1978. By the early 1980s, a new senior leadership group was emerging at national level. Many were of the generation who had attended the 1970s Members' Conferences. They had established informal friendship networks within the organisation.

In the early 1980s, there was a sudden infusion of grant aid from Government for the employment of staff. There were insufficient management systems in place. Role ambiguity and confusion resulted. Staff members were concerned about their low salaries. Volunteers were anxious about what appeared to be a professional youth worker 'take over'. High levels of tension, conflict and confusion occurred. There was confusion around lines of responsibility, tensions between federal aspirations, actual levels of development in many regions and the active development support required by regions.

The purchase of a new National Office increased the level of financial pressure on the organisation. There was confusion over the future of the organisation. The distances between the national organisation and the youth work at local level were increasing, and increasingly mediated by regional staff and regional level voluntary committees. Some expressed fears that the organisation was going to break-up. It was felt that powerful regional satellites were not allowing club participation to take its course. There were questions regarding the ongoing validity of the organisation and its role. The success, in a limited sense, of the development of regional entities resulted in power shifts within the organisation - particularly as power and resources transferred to the regions. This strained the structure of the Federation.

During the 1980s, the friendship network established in the 1970s was the informal dominant influence at the apex of the organisation. This was reflected in the informal consultations that took place between the General Secretary and 'key' regional directors - without the involvement of other senior members of staff or the National Executive Committee. It has been reported that issues and decisions were often presented as a 'done deal' following these consultations.

There was an increased tendency to rely on regional staff to participate in the national organisation and on their informal channels of communication. Combined with the increased marginalisation of volunteers in the management and representative structure, their increased focus at local levels and within youth club work rather than in the development agenda of the organisation, the increase of power and informal influence of regional staff may have been inevitable. This was combined with tensions arising from inadequate management systems and structures at national and regional levels for these regional staff. At staff conferences, there was criticism of the lack of vision in the organisation and a lack of sense of the educational role of youth work amongst volunteer adult leaders. Much of this led to informal decisions being made, informal communication taking place and the by passing of the formal decision making structures of the organisation.

As mentioned earlier, a number of organisational reviews took place during this time. These appear to have been a response to these communication, conflict and power-sharing difficulties. The new Constitution that emerged, establishing the constituent bodies, could be understood as an attempt to both encompass and direct these various energies within the organisation and to enable the organisation to move forward.

The problem with this interpretation appears to be that the overt, stated principles, plans, strategies and new structures appear to have been in conflict with the actual behaviour and approach of the leadership of the organisation at its apex. No means were put in place for

the election of delegates at regional level to the new constituent bodies. The exception to this was C.O.L.Y.S. (Council of Local Youth Services). All the other fora required the development of new structures at regional level. This in turn required the political will, influence, and resources, at both regional and national levels, to enact it. Given the unorganised position of adult volunteer leaders in the organisation and the dependent nature of young members in the organisation, where was the drive to undertake these development tasks to come from? The only options were the senior leadership at the apex of the organisation, and the influential staff at regional youth service level.

During the period following the adoption of the new Constitution, regional youth services sent representatives with conflicting positions to different constituent bodies. This level of inconsistency emanating from the regions may reflect the level of organisational development at that level. In particular it suggests:

- The depth of vision or sense of mission held by regional youth services in relation to their own role and that of the national organisation;
- The low level of awareness / reflection on the external environment in which they operated at the time, and the likely future scenario in which they would have to operate;
- The type of engagement at regional level in strategic discussion and development work involving adult volunteer leaders and young people.

The role of regional development officers had become particularly narrowly 'political' and informally influential. This was as a result of their strategic position in the organisation, not least resulting from the historical conditions that had influenced development. In particular this related to:

- The underdeveloped levels and types of participation of adult volunteer leaders at regional levels;

- The dependence on these staff members as means of communication between the various levels and groupings in the organisation;
- The underdeveloped administrative and management systems that pertained;
- An organisational culture reliant on informal communication between established friendship networks.

As a result, these regional staff had a large amount of informal control at regional level and a large degree of participation at national level.

Similarly, there was a poor climate of industrial relations in the organisation. This had arisen from the circumstances the organisation had found itself in at the beginning of the previous decade, and its ability to manage the situation effectively at the time. The combination of these factors led to a significant tension, non-productive conflict and short-term political rather than strategic behaviours in the organisation.

It appears that, particularly as a result of the role of the regional development officers, youth club dominated regions (as opposed to those with a broader spectrum of youth services) were dominant in the organisation, informally at least. This related to the informal influence of friendship networks in the consultation and decision-making processes in the organisation originating during the previous decade.

It was felt that there was a lack of transparency and accountability in the organisation. This may have reflected a lack of trusting relationships and the predominance of power games and political activity in the inter-relationships between members, and between members and the National Office. In this context, the National Executive Committee of the organisation was weak.

In 1989, the new Chief Executive Officer was appointed. He identified:

- The critical financial situation in which the organisation found itself;
- The inadequate administrative and financial procedures exacerbating this;
- The power / political dynamics in operation particularly involving regional officers;
- An apparent blindness in the organisation to the severity of its situation;
- An apparent unwillingness to confront problems directly.

He reported that he often found that, at regional meetings with member youth services, he would engage with his staff deployed regionally, rather than senior regional volunteer leaders / management. This was also reflected in the representative structures / meetings and fora at national level. Quite often destructive, adversarial conflictual situations arose with these members of staff. The Chief Executive felt they had their own agendas that these were not necessarily in the best interests of the regional youth services whom they represented.

New procedures were introduced regulating communications and staff meetings at National Office. Breaches were subject to disciplinary procedures. This ultimately resulted in the development of a staff and volunteer culture of non-participation and fear. The levels of direct communication between members of staff and volunteers in the organisation also became more regulated. Increasingly the Chief Executive became the central focus for staff-volunteer communication at National Office.

The Chief Executive believed that the accountability mechanisms in the organisation were ambiguous, dispersed and often contradictory in positions adopted - particularly given that they were all supposed to be delegated by each regional youth service. There should, therefore, have been some consistency in positions adopted, but there was not.

The Chief Executive adopted an approach in his communications within the organisation, and particularly with the Board, of 'telling the truth' about the severe financial situation the

organisation was in - that is the current reality facing the organisation. By his own admission, his style was confrontational. He saw himself as putting issues on the table requiring resolution. This appears to be something that had been avoided prior to this, publicly at least. He felt being an outsider enabled him to query and question the logic of the structure and other elements of the organisation.

The Chief Executive saw himself as enabling a reflection process within the organisation, particularly with the National Executive Committee and C.O.L.Y.S. He felt consensus began to build at Board level and C.O.L.Y.S. after a time. He believed it took three meetings to get a decision on an issue. The first meeting set out the issue. The second thrashed it out and made a decision in principle. The third meeting confirmed the decision. He stated that people then became intolerant of others trying to reopen discussions on issues already decided. In his view, this increased the capacity of the Board to take decisions.

Establishing clearly to whom he was accountable was a concern for the Chief Executive. He focused on the National Executive Committee. However, he observed that the nature of the representation on the Committee - based on types of youth work and so forth through the constituent bodies - meant that people only engaged whilst their area was being discussed. They lost interest as soon as the agenda passed on.

This may indicate a lack of common vision and ownership of the organisation among this senior management committee. Similarly it suggests that the group was not cohesive in strategic terms, impacting negatively on the strategy development capabilities of the senior leadership of the organisation. There also appears to have been issues regarding Board confidentiality - again reflecting the lack of common ownership and cohesion of the committee.



The Chief Executive adopted an approach of consulting informally with what he described as 'key' policy makers at regional youth service level. The Director's Network was established involving the staff directors of the member youth services. This was heavily influential in the development of the organisation and the positions it took. This was even though the group had no democratic mandate. On occasion, this group was consulted before the Board. It appears, despite the statement of the Chief Executive regarding the Board / National Executive Committee being the central structure of accountability, that, as time passed, the Board often appeared to be bypassed or was consulted only after the Directors' Network or C.O.L.Y.S.

There also appeared to have been relationship difficulties between the regional membership and National Office. It was reported that the National Office, the national organisation essentially, had a low status in comparison to the individual members.

The Chief Executive queried the level of consultation that took place with the regions. In 1992, liaison roles with regions were assigned to National Office staff. It was felt that something was seriously wrong with internal communications in the organisation. Regional directors did not re-communicate information up or down the organisation. The Chief Executive felt that, in general, internal communications in the organisation worked well, although, he believed, the chain of communication was extremely long.

The Chief Executive also identified issues related to the efficient use of staff resources. He believed too many different meetings and committees with common membership took place. These were terminated. At staff meetings, members of staff of the National Office were required to report on activity. They were disallowed from raising anything that had not been brought up with his or her line manager. Doing so brought a severe reprimand. This resulted in a reduction in participation by these staff in discussions and initiating debates or

ideas. There was little toleration by the most senior management of the articulation of alternative perspectives by subordinates. It produced a sense of 'fear'.

Formal decision making procedures on important issues were underdeveloped - for example in relation to grant aid criteria. This indicates again the level of informal communication and decision-making that had been the basis for decision-making in the organisation.

Discussions at Board meetings in the mid-1990s in relation to Board effectiveness highlighted issues of communication. These indicated that the Board appeared not to be a central focus of power or accountability in the organisation, or informed or engaged in regular interaction with the general work of the organisation. For example, this was indicated by the Board calling for:

- User-friendly Board mailings;
- Copies of mailings to youth services to Board members;
- Contact between Board and staff;
- Structured briefings;
- Weekend meetings to allow fuller discussion and interaction of the Board;
- Training;
- Utilisation of external consultants.

The Chief Executive felt that documentation and the effective chairing of meetings were the two factors that aided discussion and decision-making. The documentation meant people had notice of what would be discussed. Effective chairing required someone who could not be tripped up by procedure, he felt, and yet who would give people scope to make their point. The Chief Executive believed that it paid to take an extra six months to get agreement even though the same decision would be taken. He felt as a result people would have a greater sense of ownership of the decision.

In terms of conflict in the organisation, the new Chief Executive inherited conflicts culminating in a weak sense of ownership of organisation. He pushed a particular interpretation of the new Constitution and the need for the constituent bodies, the location of power and decision making and organisation ownership. His confrontational style and heavy emphasis on his senior authority in the organisation resulted in a tendency among staff and weaker regions to avoid conflict and confrontation - 'keeping the head down'. This may have built on an existing organisation culture of being wary of the political behaviours of more powerful players in the organisation.

It appears that any structure which appeared not to threaten the power dynamic in the organisation, and in particular the authority and control of the Chief Executive, was allowed to develop - under restrictive conditions. These restrictions were often determined by the difficult financial situation in which the organisation was operating. An example of this was the Special Youth Services Forum that the Chief Executive described as essentially being a support programme and advisory structure. The Irish Youth Work Resource Centre was seen as a policy development resource – and which was heavily dependent on external contracts for its operation. These examples can be compared to the demise of the Youth Forum following resourcing decisions made by the Chief Executive.

The Chief Executive stated that during his term of office he did not want to do informal deals - he felt this had been the means of resolving difficulties in the past. He wanted a system through which decisions would be made and issues resolved. His use of a confrontational style, he believed, helped to achieve clarity, decisions and transparency. The Chief Executive did not believe in, and challenged, social education agendas established during the 1970s and 1980s within the Federation.

Board discussions in the early 1990s reveal tensions around the lack of vision and strategy for development within the organisation and regions. In this respect, incorporation represented an attempt to put control / structure on 'chaos'.

**Output :      Membership participation patterns in the organisational strategy cycle and their relationship to the development of organisational learning capacity**

With the beginning of the 1970s, the most influential and dominant group in the strategy development / formal processes / organisational structures was the small cadre of newly trained youth workers, largely male and clerical, who became members of the National Executive Committee in the early years of the decade. They shared a vision of the organisation, preferred working methods (i.e. group work) and philosophy of youth work. For various reasons, not least their personal and professional needs for a support network and their common experiences in attempting to develop the organisation, a strong and largely cohesive group developed. Within this group, there were different profiles. It included, for example, the first professional youth worker with a Protestant background in the Republic of Ireland and a number of Catholic nuns who were also trained professionals in youth and social work, as well as a number of Catholic priests.

The data indicates that the working methods adopted by the group in the early part of the decade, enabled the inclusion of at least some diverse perspectives, and the development and adoption by the organisation of a new constitution, policies, structures and strategies. These moved the organisation from a point of near death to one of growth and development, and of funding from Government. However, it can also be noted that in major matters of organisational development, the membership in general was not consulted in relation to the decisions made - that is to suggest voluntary leadership at local or regional level. It has been suggested that this was because volunteers at local or regional levels were unorganised and because the National Executive Committee were a very strong and cohesive group.

This senior leadership group made particular efforts to involve young people in the national organisation and to develop their sense of ownership of it. This may have reflected both their own workload (at regional / diocesan levels) and their own training and philosophy. It can be suggested that in doing this they were engaging directly in youth work at a national level. A sense of ownership and political engagement with the organisation developed among this group of young members.

While the senior leadership group attempted to engage in the development of training and exchange opportunities for local adult voluntary leaders, difficulties were experienced in doing this. Trainers had to be trained in order to carry out local initiatives. This was time consuming and there was something of a time lag before these human resources became available. There were issues related to background culture, self-confidence and experience that inhibited the participation of volunteer adult leaders in the opportunities that were provided. Finally, as the work of the organisation and the senior leadership members professionally involved in youth work was growing at both regional / diocesan levels and national level, the human resources available to undertake this work was inadequate to the task.

One of the results of this situation was the development of a sense of resentment and lack of ownership of the organisation and its work among volunteer leaders locally. This may be reflected in the high turn over of volunteer leadership at regional level causing communication and relationship difficulties with the National Office, and in the level of conflict that developed among members of the National Executive Committee in relation to the need to employ professional staff to support the further development of the organisation and its work. The increased distance between clubs and Head Office resulting from the regional council structure, impacted on communications and relationships also.

This was particularly given the under development of regional councils in general at the time.

Within the membership structure of the organisation, the regional councils who had full time staff resources supporting their work were the most organisationally strong and influential. These reflected, to a large extent, the Catholic dioceses that had appointed full time youth workers (usually religious personnel or priests). By the end of the decade, these youth workers were gradually becoming Directors of Catholic Diocesan Youth Services.

In terms of participation in strategy processes within the National Federation of Youth Clubs during the 1970s, it can be suggested that the dominant influence was that of the senior leadership group. Little involvement or attempt at involvement was made in relation to the local adult volunteer leadership group or volunteers at regional level. Greater involvement of those young people who had been involved in organisation programmes began to take place at annual general meetings within the organisation. A new national leadership group developed as a result.

The pattern of under or non-participation of adult volunteer leaders at local and regional levels in 'national' / 'regional or diocesan' organisation activity can be understood in terms of organisation culture. This may be in two ways.

Firstly, the transition of the dominant leadership at senior level of the organisation at the beginning of the decade may have been facilitated by the clerical/ religious status of many of those involved. This may have conferred a level of legitimacy allowing the transfer of power. This took place in a context where local adult volunteer leaders had little ownership of or involvement in the organisation.

The second factor may relate to an evolving element of the organisation's culture related to the professional training and professional role of the youth workers involved at National Executive Committee level during this period. This may have stimulated programmes to encourage the participation of young people in the 'national' organisation. This is in the context of the lack of, or delay in providing, similar and meaningful opportunities for adult volunteer leaders - or, indeed, initiatives to involve them in major decision making in the organisation.

This could also be understood, however, in terms of the under resourcing faced by the organisation particularly in terms of the trained human resources available to it. Initiatives were taken to develop these. This entailed a time lag during which other significant developments occurred impacting on the climate within the organisation.

This indicates that adult volunteer leaders at a local level were precluded from participation in the strategy development processes of the organisation and other formal organisational processes as a result of three elements:

- The knock-on effect of the emphasises on control in the organisational culture during the foundation of the organisation such that the means and tradition of active participation among this group had not developed;
- The time lag that resulted during the 1970s in providing opportunities and meaningful encouragement to this group to participate;
- This occurred in the context of other organisational developments which empowered other groups in the organisation (young people and staff), resulting in increased resentment, disengagement and alienation among the adult volunteer leadership group at local and regional / diocesan levels.

The situation, therefore, appears to have reinforced the organisational culture established during the early period of the organisation as key organisational groups did not contribute to

the strategic information gathering, reflection and analysis, decision-making and implementation within the organisation. The processes to enable this to occur did not develop either formally or informally. This was despite the fact that the National Executive Committee during this time included diversity within its own membership, and utilised working methods to enable diversity to be constructively used.

During the 1980s, the informal role of regional staff increased as the major regional influence on strategy development at national level. Increasingly, they undertook to represent regional youth services in formal structures and meetings of the organisation.

Adult volunteer leaders were increasingly focused on club development at local level, or on club development committees at regional level. With the new Constitution, it appears that, to a very large extent, their participation was corralled through the representative structure. This was reflected in the voluntary National Executive Committee members being involved with youth club work whilst full time staff / directors of regional youth services were increasingly involved with projects focused on disadvantaged young people.

It appears that the patterns of participation established in the earlier phases of the development of the organisation continued, and, perhaps, even became more entrenched by the end of the 1980s.

This experience also relates to the strong, informal, friendship networks that operated. These were exclusive of many. This, in combination with the huge resourcing pressures faced by the organisation, seems to have encouraged the development of informal, narrow, political behaviours as a means of making decisions and dealing with conflicts.

There appeared to be a conflict between what was being overtly put forward as the position and vision of the organisation, and how those persons in influential positions acted. The



constant engagement in review processes during the 1980s, in the apparent absence of moving forward on these matters, indicates ongoing destructive conflicts, confusion, power plays and political behaviours having a disabling effect on the ability of the organisation to move forward in a strategic fashion.

It also implies that the organisation was not engaging in effective environmental scanning (internally or externally) to identify major threats to the survival of the organisation that were emerging - particularly in financial and managerial terms. This is despite the fact that these matters were raised in various fora and people were aware of them individually. It appears that the difficulties lay in the organisation's ability to process these matters, to reflect on them communally in such a way to make and implement the decisions required.

It is unclear whether the organisation identified under participation among certain groups as an issue. It seems that it did not. The main concern in the Constitution adopted at the end of the period was the corralling of some interests in the organisation so that others might develop, and also the streamlining of the main sources of influence and power within the organisation.

The staff groupings were the dominant coalition in the organisation, the adult volunteer leaders were not organised. In theory, the new constituent bodies established under the Constitution allowed for the increased participation of the adult volunteer leader group. This was dependent, however, on the resourcing of the structures at regional and national level to enable their effective participation. The actual, political behaviours of the most influential leadership groups in the organisation during the period indicate that this was not their primary intention.

The participation of adult volunteer leaders in the organisation had not been the object of large scale organisational resourcing during most periods of the organisation's history to this

point. The establishment of corralled structures provided the organisation with the opportunity to engage in the development of alternative, innovative forms of youth work rather than be limited to its traditional focus of youth club activity - in which most adult volunteer leaders were engaged. The structures did not allow, in themselves, for the involvement of such leaders in reflection or analysis to expand the horizons of their activity.

Between 1989 and 1997, the tradition of young people in the organisation being able to develop leadership capabilities and opportunities through national organisation programmes was terminated. This resulted in the non-participation of young people in the 'national organisation' and in strategy development processes by the end of the period. It also impacted on organisational leadership development.

At the beginning of the period, regional development officers employed by the national organisation were in pivotal roles in terms of communication and informal influence within the organisation. This contributed to the under participation of the adult volunteer leadership at regional level. This led to power and narrow, political type behaviours outside of an organisationally strategic context. This led to significant destructive conflict with the senior staff management and resulted in the introduction of rules, procedures and strategies to reduce the level of influence of regional development officers. By the same actions, the involvement of adult volunteer leaders at regional level was increased in terms of their attendance at national organisation events and representative structures.

'National' organisation staff reduced their levels of participation as a result of the formal actions of the senior staff management. This then resulted in the development of a culture of centralised control and fear in terms of their involvement.

At this time, the members of the senior representative structure (the National Executive Committee) were required to actively engage with the severe financial problems that the organisation was encountering - and did so.

Subsequently, resourcing was withdrawn from the constituent bodies. In time, they became defunct or were terminated through the incorporation process. This had the effect of:

- Isolating members of the National Executive Committee / Board, particularly those with a volunteer background;
- The involvement and potential contribution of the members of the constituent bodies at national and regional level was undermined. This was particularly the case in relation to adult volunteer leaders and young people;
- Removing channels of participation and election / representation particularly to those involved in volunteer work in youth clubs, young people and those involved in special youth services;
- Increasing the levels of influence of senior management committees at regional levels, and particularly regional directors.

As the decade wore on, the Directors' Network was established and became very influential. This consisted of the employed directors of the regional youth services in membership of the organisation. There is evidence to suggest that in many ways this was seen as the most powerful and influential group in the organisation by the senior staff management. To some extent this contributed to undermining the strategic involvement of the Board of the organisation - the mandated elected representatives.

This was an issue addressed by the Board towards the end of this period, but not acted on to any significant extent largely as a result of the non-allocation of staff resources to carry out the limited number of decisions made.

Authority, power and control in the organisation during this period were very clearly located with the Chief Executive. This had the effect of significantly, and totally in some cases, limiting the participation of staff, adult volunteers and young people in the on going strategy development processes of the organisation.

Therefore, there was increasing under participation, or non-participation of staff employed by the National Office, young people and adult volunteer leaders – and Board members.

The empowered participation patterns during this period reflected the groups who were most influential during the first two decades of the operation of the organisation:

- The professional, employed youth workers at regional levels;
- The senior management of the national organisation.

This reflects issues of control and centralised, appointed (rather than elected) authority as characteristics of the organisation's culture. For most of the period the focus of participation by these groups appeared to be the current reality rather than the future scenario of the organisation.

This indicates that the organisational culture precluded the participation of groups with different profiles in the strategy development process and other formal organisational processes / structures. This indicates an organisational learning and environmental scanning dysfunction within the organisation as each of these non-participating groups had some of the closest contact with significant aspects of the organisation's environment - internally and externally.

Those groups empowered within the organisation were in intermediary, mediating positions. If they were in receipt of a diversity of environmental feedback they could

facilitate its integration and the development of commonly held knowledge, strategy development, implementation and so forth. However, in the absence of the participation and communication with such a diversity of environmental sources the ability to undertake this role was severely undermined.

The response of the organisation to the position it found itself in was, ultimately, to actively seek to reduce the levels of participation of a number of significant sources of environmental information and undermine their participation in the strategy development and formal processes / structures of the organisation. The justification for this may have been that greater control was needed in order to regularise the financial management of the organisation, however this was largely within a perspective dominated by 'current reality' rather than 'future' focus.

During the 1970s, therefore, the main blocks to organisational learning being experienced by the organisation appear to have been:

- The organisational culture in relation to the participation of adult volunteer leaders inherited by the new leadership group of the early 1970s;
- The concentration on the involvement of young people in national programme activity by this senior leadership group, perhaps due to their own professional youth work training and involvements;
- The time lag in providing participation opportunities to the adult volunteer leadership group as a result of inadequate human and other resources available to the organisation during the decade.

During the 1980s, it appears that the blocks to enabling greater participation of under or non-participating members in the organisation's development and learning related to:

- The future vision of the organisation (which did not include adult volunteer leaders as core resources of the organisation) held informally by influential leaders in the organisation;
- The lack of a genuinely shared vision of the future and ways of operating by the senior leadership of the organisation (despite various review statements being issued), and the lack of a cohesive National Executive Committee with the capacity to move the organisation forward;
- The emergence and predominance of narrow, political behaviours and power plays to deal with tensions and conflicts within the organisation;
- The established culture of the organisation that ensured the non or under participation of adult volunteer leaders in the strategic development processes of the organisation;
- The established under resourcing of the participation of adult volunteer leaders in the strategy development processes and structures of the organisation, and which continued their established lack of influence within the structures.

Between 1989 and 1997, the organisational blocks to effective participation and organisational learning appear to have been:

- The style of leadership of senior staff management which reflected a heavily centralised approach to power, control and authority, and an approach to conflict which induced fear and withdrawal;
- The historical under participation of adult volunteer leadership at regional and national levels resulting from issues of organisational culture and related strategies;
- A lack of commonly held vision of the organisation and of the future environment in which the organisation would have to exist;
- A continual concern with current reality outside of a consideration of future vision and environment;

- A non-strategic political view held by senior staff management of the operation of power in the organisation;
- A weak representative structure and under resourced support for volunteer participation in the representative structure;
- Unspoken divergent views of the role of development staff within the organisation, particularly on the part of senior staff management.

**Input output Analytical Model (Part Three):      The relationship between strategic change capability and the learning capacity and patterns of membership participation in the National Youth Federation**

**Input: Profile of the membership**

During the period 1997-2000, all of the Board members were lay people. Seven out of the sixteen members were men. There was a woman President - originally representing the N.Y.C.C. on the Board. In 2000, a new President took over. She had a similar profile although from a different member youth service.

During this period, difficulties continued in securing sufficient nominations for elections to the Board. In 1999, this necessitated the A.G.M. being suspended to recommence later in the year when sufficient nominations to the Board were secured.

A new Chief Executive was appointed in 1997. He had been a member of the senior management team in the organisation and prior to that had had a long career in the National Youth Federation and youth work. He identified the level of ownership felt by the membership of the national organisation as a key issue. It had become clear to him, for example, through discussions on the development of a new corporate identity that the member youth services did not want to be seen as branches of the national organisation but rather as autonomous organisations.

This fact among others, including the rapidly changing youth work environment, convinced the new Chief Executive that the organisation needed to change its mission and, in particular, to make its services available to non-members. This had already begun to occur



through the Irish Youth Work Resource Centre. The Chief Executive also felt that the organisation should attempt to develop improved working relationships with other agencies. This ran counter to the general competitive climate that existed in the youth work environment at national level.

On taking over the role, the Chief Executive identified the following related issues. There was a need for the restatement of organisational values and the development of strategic objectives. There was no clear definition of services provided by the national office. Staff resources at national office were absorbed by historical structures (suggesting that they were being continued because they existed rather than because they had an important strategic function). There was no shared, clear corporate identity, public relations or communication strategy. The organisation was heavily dependent on the Department of Education for funding - in a context where the Department was proposing major changes in the youth work environment at local level.

It appears, therefore, that the purpose of the organisation was unclear at this time. Major internal and external threats existed in terms of its long-term survival. This was in terms of its perceived value to the membership, in addition to the future role it could play in a changed youth work environment. These were likely to impact within a short-term time frame.

### **Change arrangements**

The Membership and Structures Review Group was established in 1997. It reported in 1998. It recommended that all structures of the national organisation be terminated except the A.G.M. and the Board. These were replaced with the organisation of contact points in the form of events and networks within the organisation. These aimed to enable the 'processes' of communication, learning / strategic reflection and evaluation at an organisational level. The intention was to integrate this approach with strategy

development processes. It aimed to result in more effective ways of engaging with the membership.

The Chief Executive delayed the adoption of the draft strategic plan – prepared prior to his appointment. He extended the time frame for its adoption. He provided member youth services with staff resources from National Office and requested that they develop three-year local development plans before attempting to finalise the strategic plan for the national organisation. As part of this process, a guide to the youth work environment and likely changes to occur was developed by the national organisation to aid the reflection and environmental scanning of the member youth services during the course of their strategic planning.

By adopting this approach, the Chief Executive attempted to renew contact between the National Office and the member youth services through direct interaction rather than through structures. He also saw this as an opportunity to ‘tell the truth’ and to describe the likely reality of the future of local youth services - and the likelihood that the member youth services would have to participate in a public tendering procedure in order to continue to provide such services in their areas. Without undertaking this process, the Chief Executive felt that minimal ownership of Federation’s national plans would continue, and the future of member youth services would be undermined. In general, the member youth services engaged in the completion of local strategic plans. Subsequently, the national plan was adopted at the organisation’s A.G.M. The objective of the national plan was to respond to the needs emerging from the strategic planning process engaged in by the member youth services.

This process emphasised the provision of reflective space within the organisation. This had not been available prior to this - that is to say structured and resourced time at local and national levels for reflective and analytical purposes had not been prioritised in the

management of the organisation. This approach refocused National Office staff resources from structures to strategy development process at local and national levels - in-built inter-tier organisational communication, particularly listening, mechanisms.

The Chief Executive felt this approach enabled tighter accountability within the organisation than previously. It provided greater 'customer' focus at national level. This linked, in turn, to the achievement of increased focus and clarity of the roles of staff and others. The Chief Executive reported that this process led to a degree of anxiety amongst staff at National Office.

The Chief Executive had also identified that there was a need to develop more feedback opportunities to the organisation. This initiative, in part, sought to address this need. It also attempted to create an internal logic and consistency, or system, integrating various organisational processes and accountability structures.

A relationship and communication 'gap' was identified between the Board and National Office staff. The Chief Executive believed that this was partially related to the level of discomfort on the part of Board members acting as employers and managers of these staff. It was also a result of the senior management approach adopted during the previous decade. During the course of data collection for this study, the Chief Executive was in the process of organising a social gathering and more formal reflection workshop on the future vision of the Federation involving the two groups. By doing so, he hoped to begin to build communication, contact and common vision between them.

Having completed their original report, the Membership and Structures Review Group remained in operation. Its new task was to design a Model of Local Youth Service that would be commonly owned by the member youth services. This effort was an attempt to:

- Articulate the type of work in which a local youth service and the national organisation would be involved in the future;
- What types of factors influenced the work;
- What types of resources across human, legislation, physical, capital considerations were required to support the national organisation in doing this.

It was an attempt to develop a 'Quality Template' for the operation of the organisation at member youth service level with implications for the service provided at national level.

This was a core element of the national strategic plan.

For the Chief Executive, issues of standards were the most significant aspect in this discussion - Quality Assurance. Difficulties were experienced in completing this task satisfactorily. The original draft was severely amended at the penultimate meeting of the working group. The Chief Executive felt that this was due to a fear among some that too many 'hurdles' were being set up that would be too difficult for many member youth services to fulfil. The group, therefore, adopted a lowest common denominator approach.

This demonstrated a tension in the organisation between a minimalist / lowest common denominator approach on the one hand and, on the other, trying to achieve higher standards - and then assist people's training in an incremental way to meet the increased demands. This experience may also indicate the culture of fear and 'keeping the head' down that had developed in the organisation during the previous decade. This discussion may have been affected, for example, by the manner in which the Membership Charter had been addressed. The working group's draft document was adopted at the A.G.M. It was acknowledged, however, that the work was ongoing and that the model would evolve further.

A conference was organised on the topic of a Quality Assurance Template related to the model of local youth service. This was used to start a process of bench marking against

another organisation. This entailed looking at their good practice and then developing it into a quality template. 90% of those present had not seen the circulated document beforehand. This bore out the belief of the Chief Executive regarding internal communications and representation, and past experience in the organisation particularly in relation to the role of local youth service management as significant links in the communication chain. Following the conference, it was reported that 'more people bought into the idea'. A broader meeting of practitioners and managers was planned to take the process further. The Chief Executive explained that the objective was not the creation of a 'police state' but peer accountability and inspection in a developmental context.

The basic approach he adopted in relation to these strategic issues was as follows. A working group was established:

- An open invitation was issued to join the group in addition to specifically inviting a number of people who were known to have something in particular to contribute;
- There was a gradual expansion of those involved in the discussion through the use of events / conferences;
- The discussion emerging and consensus emerging was linked to the A.G.M. decision-making process in terms of adopting further plans, policies and so forth;
- Pilot projects were undertaken to test the template / programme / policy;
- Review and reflection on the experience and findings of the pilot studies took place;
- The learning was identified;
- Those involved in the work were required to have a strong communication link at local level (that is to say at practitioner level as well as connected to the decision-making level of member youth services).

The approach indicates 'political' behaviour, however, in this instance it is within an organisational strategic context.

Similar initiatives were taken in relation to volunteer development / involvement and child protection. Both reports / policies were adopted at the organisation's A.G.M. in 1999/2000.

### **Communication, conflict / difference management, participation styles and roles**

#### *The Chief Executive*

In 1997, the incoming Chief Executive identified a significant organisational communication problem. It appeared that when management of member youth services acted as central links in the communication chain, this tier of the organisation did not pass on documentation to practitioners or engage with them in discussion about issues arising. This was borne out in the experience of the development of a Quality Assurance Template within the organisation described earlier.

It would seem that a comparison could be made with the earlier attempt to enable youth work practitioners to become involved in national level decision-making through the establishment of the 'constituent bodies'. The Chief Executive felt that initially, in these earlier structures, there was communication and discussion occurring between national level representatives and the local situation. However, over time, this reduced and the representatives no longer had a clear local mandate from the regional youth services - in other words discussion was not occurring locally. This resulted in mixed messages being given from the membership in various decision-making settings in the organisations. The removal of support / developmental resources from the constituent bodies may have been a factor in this, or exacerbated it.

The new Chief Executive felt that if a person engaging in an organisational forum did not have a local mandate, that individual was not a useful resource to the organisation. This implied that his view that a 'representative' was not only a person bringing information

backwards and forwards to the local setting and national organisation, but the 'representative' was also engaged in communal discussion and reflection in those settings.

A culture of 'keeping the head down' and a fear of participating actively at formal decision making meetings, and staff meetings, existed largely due to the management approach of the former Chief Executive. This was evident at the 1999 Assembly / A.G.M., for example. During an earlier workshop session, debate and discussion was quite open and lively. At the formal A.G.M., there was little open discussion or disagreement even over the same issue under discussion as earlier. On most issues, silence resulted in decisions either not being taken or being otherwise avoided.

The new Chief Executive adopted an alternative approach to his predecessor to the operation of National Office staff meetings. This change took some time to impact. He encouraged the members of staff to express their views - without fear of retribution. Initially there was reluctance, but in time this began to be overcome when it was clear that no senior management disciplinary action would occur. A similar reluctance was evident among staff on the eve of the social gathering and reflection workshop organised for the Board and Staff of National Office.

Whilst the new Chief Executive clearly had an alternative approach to dealing with conflict and diversity, there were examples of the old approach to conflict and politics evident in the formal work of the organisation. One such case was an application for associate membership made to the A.G.M. in 1999. The application had an extended history dating back to the incorporation process. The extended process had been adversarial and negatively conflictual, destructive, in effect - despite attempts to include independent evaluation and objectivity.

The application met the constitutional requirements for associate membership but it was rejected. This appeared to be heavily influenced by the input of one of the Board members who had been engaged in the consideration of the application by the Board. Her input had related to other matters and was not related to the criteria to which the application had to conform.

The Chief Executive did not intervene or point this out. No body from the floor questioned or referred to this. This suggests that there were underlying reasons for the rejection, and that narrow, political behaviour was being used as a means to resolve the issue. The representative from the group seeking associate membership was also a member of the Board - elected originally from the N.Y.C.C. On receipt of the A.G.M.'s decision, the person walked out of the meeting and tendered his resignation from the Board.

The Chief Executive believed that leadership in the organisation was located in a number of places. He felt that he, inevitably, gave direction and drove vision - attempting at the same time to root ownership for this in the Board. His view was that leadership was also evident among the regional directors, networks, staff and the A.G.M. In relation to National Office staff he reflected how he had to challenge them in terms of their participation in the joint Staff - Board event to maximise the value of their participation. He described their reaction as “almost like sheep being led to the dip”. The Board had a similar reaction

“They are probably a little more uncomfortable with it, I suppose, sitting down with staff because it is probably a little more uncomfortable. It is one thing to say ‘we are all in this’ but we are not all in this, we are in it with very different distinct roles...”.

He felt the Board needed to expand its leadership role in the organisation. The Chief Executive's view was that the Board had a mandate. It was made accountable at the A.G.M. It had National Office as a resource. He felt the Board needed to 'push forward'. He



believed there was no need for the Board to be reticent and to constantly look over its metaphorical shoulder. There was a need for the Board to be less hesitant and more vocal. The encouragement of the development of vision in the organisation required good planning, risk taking and federal commitment, he believed. There was, therefore, a need to spread leadership and responsibility. The organisation, however, was very dependent on the Chief Executive for leadership. He was fearful that change and development in the organisation would stop if he left.

The Chief Executive stated that he was struggling to redefine his role within the organisation. He felt people did not want change in this respect. He also felt both he and the other staff needed to have a life beyond work, and to be realistic about what could be achieved in organisational terms.

In terms of the leadership role of the national staff, he stated that the main difference between staff and regional representatives was that while staff had a listening role, they did not have a regional mandate.

The Chief Executive stated that it was important to create space in the organisation to allow people to talk to each other. He felt this was particularly the case for the Board in terms of their opportunity to talk to member youth services. Those in leadership roles needed to listen with a view to facilitating people - and to look for confirmation of what was being described. He felt leadership was demonstrated by doing this. Staff, he felt, could informally input on this into formal meetings, but the emphasis needed to be on the designing of the reflection processes in which others could engage. He felt regional representatives had a mandate and could make decisions on what was proposed or what emerged. They had the mandate to add or subtract from proposals made by staff - "they are not fodder for staff thinking".

### *The President*

The President (1995-2000) was a volunteer, elected to the Board from the N.Y.C.C.

It appears clear from her pattern of communication that the highest frequency and most direct, two-way communication occurred between her and regional management committee members, and between her and the Chief Executive.

Given the apparent low level of communication between regional management of youth services indicated earlier, her pattern of communication limited the amount of direct feedback from environmental sources that the senior volunteer representative in the organisation received on a frequent basis. Communication between the President and the rest of the Board was limited to monthly Board meetings. This indicates that relationships between Board members were limited, as the President was not engaged in relationship development with members of the Board individually.

Communication between the President and all organisational participants at various levels occurred due to the formal requirements of the organisation and in response to need. Given the frequency of this communication, it is likely that those participants that the President met only at group meetings occurred only or mainly as a result of the formal requirements / events of the organisation. This included Board members.

The communication that took place related to both the future vision / scenario of the organisation / individuals and in relation to the current realities being experienced by the organisation / individuals. The communication with all involved policy making / strategic planning, in addition to short term / reactive discussion and decision-making. The exception to this, she indicated, was her communication with young people where none of these topics applied. Her communication with all organisation participants, except young people

had either a system or single-issue focus - depending on the occasion. Her communication with young people had a system perspective.

The purpose of her communication with all organisational participants, except young people, involved information gathering, information imparting, reflection and analysis, decision-making and decision imparting. All applied to young people except reflection and analysis - these did not occur in their interaction with the President. This emphasised the non-involvement of the President in policy development or strategic planning with young people as indicated earlier.

In terms of the values that were operational at local, regional and national levels of the organisation, the President responded that, in her experience, all the examples listed below occurred at all levels. These included the following:

- The creation of a sense of belonging;
- The creation of a sense of collective security and individual significance;
- The assertion of solidarity and valuing diversity;
- The acceptance of cultural differences and focusing on similarities;
- The development of an inclusive culture through overt negotiation and definition;
- The creation of a comfortable milieu for all to participate;
- The clear recognition of differences and tolerance of differences;
- The development of shared commitment through dialogue and empathy.

In her experience, these did not occur as a result of a formal programme or policy of the N.Y.F. They occurred informally.

She did not feel that there was a common vision of the future held within the organisation.

In terms of how conflict and difference was approached at various levels of the organisation, the President felt that it was approached at local level as 'constructive contention enabling development', and as 'a threat to security, power, resources and influence'. At regional level, it was approached as 'constructive contention enabling development', 'a threat to security, power, resources and influence', and as 'adversarial with a win/lose focus'. At national level, she felt conflict was approached as 'constructive contention enabling development', 'a threat to security, power, resources and influence', and as a 'non-adversarial problem solving approach in context of mutual understanding / values and recognition of difference'.

It appeared that, in the experience of the President, at both regional youth service management level and at national level, there was something of an organisational culture clash in relation to how conflict and diversity was managed / approached. In her opinion, it seemed that the approach to conflict / difference management at regional level had the greatest potential to be destructive. At national level, however, conflict / difference management appeared to be more constructively used. This may reflect the impact of the approach of the new Chief Executive at national level - but which may not have impacted at regional management level, at that time at least. The alternative approach to conflict at local level may be a result of the general non-involvement of adult volunteer leaders in the structures during the course of the organisation's history. This may mean that they may not have been affected to the same degree by the organisational culture in this respect.

In the experience of the President, leadership at various levels of the organisation undertook the following tasks. At local level, it enabled debate and discussion. It actively enabled others to participate in this process. At regional level, it undertook the same tasks and she felt it also actively sought divergent opinion. At national level, she felt the tasks undertaken by the leadership were the same as at regional level with the additional emphasis on encouraging closure of a difficulty within a given time frame.

In terms of the roles leadership encompassed at various levels of the organisation, the President felt it fulfilled the following at all levels - enabler / facilitator, guardian of organisation mission and membership, describer of current realities, mediator / negotiator between different groups and perspectives in the organisation.

She did not see leadership roles encompassing being the authority and source of knowledge in the organisation, designing learning processes so that people in the organisation could deal productively with critical issues and learn to learn effectively from the experiences, stating vision or engaging in reflection and analysis.

In relation to the role of representative in the organisation, the President felt the following descriptions applied to all representative roles at all levels in the organisation. These were: the authority and source of knowledge, designer of learning processes so that people in the organisation can deal productively with critical issues and learn to learn effectively from the experiences, enabler / facilitator, guardian of organisation mission and membership, vision stator, describer of current realities, reflector and analyser, mediator / negotiator between different groups, perspectives in the organisation. It is evident that the President identified more leadership roles associated with being a representative than when she considered leadership as a concept in operation at each level of the organisation. The primary differences in her view appeared to relate to spanning boundaries and engaging in knowledge creation.

She felt that the role of representative did impact on the rest of the life of the individual involved. She stated that the time element involved in the commitment was substantial. It was very difficult for people with family responsibilities to give the time necessary. She continued by saying that she felt the N.Y.F. tried to respond to this by taking into consideration the time commitment involved in undertaking work for the organisation. Similarly, she stated that this impacted on the equality of opportunity of those involved to

engage in representative roles - as people with other commitments were not able to give the time required. This therefore, appeared to impact on the diversity of people who could engage in representative roles in the organisation - even if the organisation wished to be inclusive. It means of doing business may have prevented that.

The President Elect (1999/2000) was also originally elected to the Board of the organisation via the N.Y.C.C. She reported having direct, two-way communication with:

- Members of the Board on a monthly basis at group meetings, by telephone and letter due to the formal requirement of the organisation and in response to need;
- Members of the National Office staff 3-6 times annually by letter and telephone in response to need;
- Chief Executive Officer on a monthly basis face to face at group meetings, by telephone and letter in response to need;
- Members of national working groups on a monthly basis at group meetings, by telephone and letter in response to need;
- Members of regional management committees on a weekly basis by letter, at group meetings and by telephone due to the formal requirement of the organisation and in response to need;
- Regional staff on a weekly basis face to face at group meetings, by telephone and letter due to the formal requirement of the organisation and in response to need;
- Volunteers at local level on a weekly basis at group meetings, by telephone, face to face, by letter in response to need;
- Young people involved in the organisation at local level on a weekly basis face to face in response to need.

The President Elect displayed a different pattern of communication - indicating greater connection with a greater variety of sources of environmental feedback. However, the limited contact between members of the Board is again evident, although in this instance

there appeared to be a pattern of interpersonal relationships in addition to formal business relationships between the President Elect and other Board members. It was also evident that there were comparatively low levels of interaction / interrelationship with National Office staff, and as indicated with the Chief Executive.

The President Elect stated that this communication related to both the future vision / scenario of the organisation / individuals and in relation to the current realities being experienced by the organisation / individuals - except with young people where only the latter applied. The communication with all involved policy making / strategic planning in addition to short term / reactive discussion and decision-making. The exception to this was her communication with young people where none of these topics applied.

Her communication with all organisation participants had either a system or a single issue focus - depending on the occasion. One exception was her communication with young people - this had a system perspective. The other exception was her communication with members of national working groups where it tended to have single issue or narrow focus.

The purpose of her communication with members of the Board and the Chief Executive Officer related to information gathering and imparting, reflection and analysis, decision making and imparting. She engaged in information gathering and imparting, decision making and imparting with members of the National Office staff. With members of national working groups and regional management committees, she was involved in information gathering and imparting, reflection and analysis and decision-making. With members of regional staff and volunteers involved at a local level, she was engaged in information gathering and imparting, and reflection and analysis. Finally, with young people the President Elect engaged in information gathering and imparting. It is interesting to note that she did not engage in reflection and analysis with members of National Office staff or young people. This suggests that the process of creating joint understanding, knowledge and

vision was underdeveloped in these instances. It is also interesting to note that in both the instance of the President and President Elect their communication with young people appeared to be less analytical and reflective.

The President Elect made no response in relation to the types of values in operation at any level of the organisation, or whether they were operationalised informally or by formal programme or policy of the organisation.

She felt that there was no common vision of the future held within the organisation.

In terms of how conflict and difference was approached at various levels of the organisation, the President Elect felt that it was approached at all levels on a non-adversarial, problem-solving basis.

In the experience of the President Elect leadership at various levels of the organisation undertook the following tasks. At local level, it actively enabled others to participate in debate / discussion'. It also actively sought divergent opinion. She believed the same occurred at regional level. At national level, she felt the leadership enabled debate and discussion, actively enabling others to participate in it.

In terms of the roles leadership encompassed at various levels of the organisation, the President Elect believed leadership fulfilled the following roles. At local level the leadership acted as the authority and source of knowledge, an enabler / facilitator, a vision stator, a describer of current realities, engaged in reflection and analysis, undertook mediation / negotiation between different groups, and perspectives in the organisation.

At regional level, her experience was that the leadership acted as the authority and source of knowledge.



At national level, she felt that the leadership acted as the authority and source of knowledge, designed learning processes so that people in the organisation could deal productively with critical issues and learn to learn effectively from the experiences, was a guardian of organisation mission and membership. She also felt it was a stator of vision, engaged in reflection and analysis and undertook mediation / negotiation between different groups / perspectives in the organisation.

In relation to the role of representative in the organisation, the President Elect felt that representative roles at local level encompassed being the authority and source of knowledge, a vision stator, a describer of current realities, a mediator / negotiator between different groups and perspectives in the organisation.

At regional level, she felt the role of representative encompassed being a designer of learning processes so that people in the organisation could deal productively with critical issues and learn to learn effectively from the experiences, and engaging in reflection and analysis.

At national level, her observations were that the role of the representative encompassed being the authority and source of knowledge, and engaged in reflection and analysis.

She felt that the following descriptions did not apply at any level of representation in the organisation: enabler / facilitator or guardian of organisation mission and membership.

There appears to have been some level of contradiction in relation to the role of leadership / representative in the organisation in terms of the person involved being both the centre of authority and yet also engaged in enabling and facilitating behaviour, enabling learning from experience. This again may reflect a level of culture clash or confusion within the senior

volunteer leadership at national level in terms of its mission and how this is reflected in the methods by which the achievement of the mission was approached.

The President Elect felt that the role of representative did impact on the rest of the life of the individual involved. She stated it impacted in terms of the person having to see the other side of an argument, and also in terms of the time commitment and expense involved. She felt the organisation did try to respond to that situation by 'facilitating resources'. She felt that the situation impacted on the opportunity of members to become and remain in organisational representative or leadership roles. However, she added

*"Anyone, regardless of their background, will be supported to become / remain a representative - for a region or in a leadership role locally".*

This reflects the experience of the President outlined above.

#### *The Board*

All Board members communicated with each other. The majority communicated at Board meetings on a monthly basis, and as a result of the formal requirements of the organisation. This suggests that the Board did not encompass a strong friendship or informal relationship network.

The majority of Board members discussed matters relating to the future vision / scenario of the organisation and / or individuals. They also discussed matters relating to current realities experienced by the organisation and / or individuals. They were all engaged in policy making and strategic planning. Only half also engaged in short term / reactive discussion and decision-making. All of the Board members stated that Board level communication took place within the context of a systems perspective. From time to time, for a fifth of the members it also took place within the context of a single issue or narrow perspective.

When engaged in communicating with other Board members, the purpose of the communication related to reflection, analysis and decision-making for the majority of members, decision imparting for just over half. Less than half were involved in information gathering or imparting at Board level.

The vast majority of Board members communicated with members of the National Office staff. In general, this entailed two-way communication. Only a fifth did so on a weekly basis, just less than a third did so monthly and the remainder did so no more frequently than every two months. The latter group included both the President and President Elect. The most frequent means of communication used in this was the telephone (70%). After that, group meetings or letters were the main means used. Only a fifth had face to face encounters.

The communication took place when the need arose for the majority of Board members, and when formal organisation processes/ rules / procedures required for the remaining 30%.

This communication was focused on a future vision/scenario of the organisation / individual for 70% of Board members. It could also focus on current realities experienced by the organisation and / or individuals for 90%. The communication involved policy-making / strategic planning. It also involved short term/ reactive discussion and decision-making.

Communication between members of the Board and National Office staff had a systems perspective for only half of the Board members. This had implications for the level of actual rather than perceived strategic thinking and reflection that occurred involving these groups. This was borne out in the perceptions of the Chief Executive.

The main reason for the communication between the Board members and members of the National Office staff appeared to be information gathering and information imparting.

Reflection and analysis only occurred for half of the Board members in these interactions - reflecting their level of strategic engagement.

All of the Board members communicated with the Chief Executive Officer. This generally entailed two-way communication. Communication between the Board members and the Chief Executive Officer occurred on a weekly basis for 30%, three to six times annually for 40% in addition to the regular Board meeting. There did not appear to be a strong informal set of relationships between the Chief Executive and the Board members.

The group meetings and the telephone were the most frequently used means of communication between the Board members and the Chief Executive Officer. Less than half of the Board members had face to face contacts with the Chief Executive as a normal means of communication. This again reflected the strength of relationships and geographic dispersal.

The communication occurred as a result of requirements of the formal organisation rules / processes / procedures for 60% of the Board and in addition according to need for 70%.

The focus of the communication was the future vision / scenario of the organisation and / or individuals for 70%. In addition the focus included current realities experienced by the organisation and / or individuals for 80%. The communication involved policy -making / strategic planning for all of the Board members. In addition, 60% also engaged in short term/ reactive discussion and decision-making. The communication had a systems perspective for 80% of Board members, in addition 40% sometimes had a narrow /single issue perspective.

The main purposes of communication between the Board members and the Chief Executive Officer were reflection, analysis and decision-making.

70% of Board members communicated with the members of national working groups. This occurred for most at group meetings - for 30% monthly but for the rest on a less frequent basis. The focus of the communication included the future vision / scenario of the organisation / individuals (60%) and current realities experienced by the organisation and / or individuals (80%). The communication most often involved policy-making / strategic planning. The most frequent reasons given for the communication were information gathering, reflection and analysis, and decision- making.

The vast majority of Board members communicated with members of regional management committees. For most, this was two- way communication occurred less than on a monthly basis for the majority. It occurred at group meetings, on a face -to- face basis or over the telephone for the main part. It also occurred due to the formal requirements of the organisation or according to need for the majority of Board members. This reflected the means of communication used.

The focus of the communication included both the future vision / scenario of the organisation / individuals and current realities experienced by the organisation and / or individuals. The communication involved policy-making / strategic planning in the main but also short term / reactive discussion and decision making for just over half of Board members. The communication had, in general, a systems perspective, but for a minority could sometimes have a narrow / single issue focus. The main purposes of the communication were information imparting, reflection and analysis, and decision-making. For half of the members of the Board, it also included information gathering and decision imparting. This low level of communication with these latter purposes suggested that the representative function was not necessarily working at its optimum rate as a channel of communication between the member and national level.

Almost all of the Board members communicated with regional staff. This was generally two-way communication. For the majority this occurred on a monthly basis or more frequently. The most frequently used means of communication included: face to face encounters, the telephone and letter. The communication occurred most often in response to need but also occurred regularly due to the formal requirements of the organisation. The focus of the communication was, for the most part, current realities experienced by the organisation / individuals. The communication involved short term / reactive discussion and decision making most often but also policy making / strategic planning. The communication could have a system perspective or a narrow / single issue focus. The purposes of the communication were most generally related to information gathering. It also involved reflection and analysis and decision imparting for more than half of the Board members. It least often involved decision-making - half of the Board members were involved in this with regional staff. This suggested that the closest relationships the Board members had were with staff at a regional level. This reflected the strength of influence of this group in earlier periods of the organisation's history. It suggests that staff at regional level remained an important channel of communication and influence within the organisation.

The vast majority of the Board members communicated with volunteers at local level. For most, this appeared to be two-way communication. For half the members, this occurred on a weekly basis, and for a further fifth on a monthly basis. The majority of Board members were therefore in contact with adult volunteer leaders at a local level at least on a monthly basis, more likely more frequently. The means of communication most frequently used were face-to-face encounters, group meetings and telephone. For the most part it occurred in response to need, but also due to the requirements of the organisation.

The main focus of the communication was current realities faced by the organisation / individuals.

The communication mainly involved short term / reactive discussion and decision-making but for half of the Board members it also involved policy making / strategic planning. For half the group, the communication had a systems perspective. The purpose of the communication included information gathering and, information imparting. For half of the membership of the Board, the communication also involved reflection and analysis, decision-making and decision imparting.

This suggests that most Board members had a direct connection and relationship with adult volunteer leaders on the ground. Communication tended to focus on current realities. There seemed to be a split in the Board membership, however, in terms of how members engaged this group in strategic discussion. Half of the members engaged in the full gambit of strategic communication tasks, whilst half only engaged in information gathering and imparting - thus excluding the volunteer adult leadership from participating in communal analysis, knowledge creation and vision creation - through these opportunities at least.

The bulk of Board members communicated with young people involved with the organisation at local level. For half, it involved two-way communication. For half, this occurred on a monthly basis, on a weekly basis for 40% of the Board members. For a fifth of Board members, this communication occurred no more than once a year. The most frequently used means of communication included face-to-face encounters and group meetings. For the most part, the communication occurred in response to need - although it also occurred as required by the formal procedures of the organisation.

In the main, the communication focused on current realities experienced by the organisation / individuals. It was generally concerned with short term / reactive discussion and decision-making. The main purposes of the communication included information gathering, information imparting and decision-making. The least often cited purpose of the communication with young people by Board members was reflection and analysis (30%)

Again, in terms of communication between Board members and young people involved at local level in the organisation, there seemed to be a split in the Board. Half of the Board appear to have frequent engagement, whilst the other appeared to have very little. In addition, little reflection and analysis took place involving these young people and the Board members. This indicated that the level of involvement of these young people in the creation of common understandings, knowledge and vision for the organisation was very limited - through these opportunities at least.

In relation to leadership tasks undertaken at local, regional and national levels of the organisation, the members of the Board observed the following. At local level, the following main leadership tasks were undertaken: 'Actively enabling others to participate in debate / discussion'. This was also the case at regional level.

At national level, members of the Board identified the following main leadership task undertaken: enabling debate and discussion, actively enabling others to participate in debate / discussion, encouraging closure of a difficulty within a given time frame.

The roles leadership was seen to encompass at the local, regional and national levels of the organisation, as observed by members of the Board, were as follows. At local level, they observed that leadership encompassed the following roles: the authority and source of knowledge (30%), designer of learning processes so that people in the organisation can deal productively with critical issues and learn to learn effectively from the experiences (0%), enabler /facilitator (40%), guardian of the organisation mission and membership (10%), vision stator (20%), describer of current realities (40%), reflector and analyser (20%), mediator / negotiator between different groups, perspectives in the organisation (10%). It can be seen that there appeared to be little consensus or commonly held view of the role of leadership at a local level.



At regional level, the greatest consensus existed. Members of the Board identified leadership as encompassing: the authority and source of knowledge (50%), enabler/facilitator (50%), vision stator (50%), and describer of current realities (60%). It is clear that at regional level there was a greater level of common understanding amongst Board members in terms of the role of leadership.

At national level, the greatest consensus existed around the role of leadership (the Board members' own role). This was identified as guardian of organisation mission and membership (70%), vision stator (60%), describer of current realities (50%), and negotiator between different groups and perspectives in the organisation (70%). The main areas of convergence between leadership at national and regional level appears to relate to roles of vision stator and describer of current realities.

The role of the representative in the organisation as observed by the members of the Board involved, at local, level being the authority and source of knowledge (50%), and describer of current realities (60%).

The members of the Board observed that representatives played the following roles at regional level: the authority and source of knowledge (50%), designer of learning processes so that people in the organisation can deal productively with critical issues and learn to learn effectively from the experiences (50%), guardian of organisation mission and membership (50%), describer of current realities (60%), and reflector and analyser (60%).

The members of the Board observed that their own roles as representatives involved being the authority and source of knowledge (50%), vision stator (50%), reflector and analyser (60%), and mediator / negotiator between different groups, perspectives in the organisation

(50%). In relation to the role of the representative in the organisation, it can be seen that there were relatively low levels of consensus on the part of Board members.

70% of the members of the Board believed that playing the role of a representative impacted on the rest of the life of that individual. The Board members described the impact as follows:

- "It enabled positive learning, the broadening of horizons. There is also an impact on family life due to having to attend meetings and weekend events."
- "Role boundaries become important. The information provides a context for a national perspective."
- "There is an impact on each other within the Fed."
- "You have to see particular sides of an argument. There is an impact on time and there are out of pocket expenses."
- "There is a big time commitment and there are expenses."
- "There is an impact on personal time."
- "The commitment can be huge. It is very difficult for people with family responsibilities to give the time necessary."

60% of Board members felt that the organisation attempted to respond to these issues.

Some of the ways the organisation responded were described as:

- "Debate and discussion leading to role clarification and limitations."
- "Policy guidelines, rules and procedures regarding the role of representatives."
- "Facilitating resources."
- "Organising meetings to do business rather than just meet for the sake of meeting."
- "Takes the time element into consideration."

Half of the Board members observed that these factors impacted on the equality of opportunity of members becoming, and remaining, in representative and leadership roles in the organisation. 10% did not think it did. 40% did not respond. Specific responses in relation to this included:

- "There is a process of learning and adaptation to cultural norms and understanding norms."
- "The national is open, the regions are an unknown quantity."
- "Anyone regardless of background will be supported to become / remain a representative for a region or in a leadership role locally."
- "Not being able to afford the time or if the organisation cannot afford the expense"
- "People with other commitments cannot give enough of the time required."

Board members observed that the following occurred at various levels of the organisation in relation to the valuing and acceptance of diversity.

At local level, the creation of a sense of belonging occurred, according to 80%. The creation of a sense of collective security and individual significance, the assertion of solidarity and valuing diversity, the creation of a comfortable milieu for all to participate, and the development of shared commitment through dialogue and empathy occurred, according to 40% of Board members. The acceptance of cultural differences and focusing on similarities and the clear recognition of differences and tolerance of differences occurred according to 30%. Finally, the development of an inclusive culture through overt negotiation and definition occurred at local level according to 20% of Board members.

It would appear from this, according to the observations of the Board members whom it has been seen had relationships and regular contact with adult volunteers and young people 'on the ground', that within the organisational culture at this level the strongest value or characteristic or norm of behaviour from this list is the creation of a sense of belonging. Less than fifty per cent of respondents confirmed that the others occurred. This implies that at this level of the organisation there is, at best, a lack of conscious recognition of issues around diversity and the need to address them.

At regional level, the Board members observed the following. The creation of a sense of belonging and the assertion of solidarity and valuing diversity occurred according to 80%. The creation of a sense of collective security and individual significance occurred according to 70%, The acceptance of cultural differences and focusing on similarities, the creation of a comfortable milieu for all, the clear recognition of differences and tolerance of differences in participation occurred according to 60%. The development of an inclusive culture through overt negotiation and definition and the development of shared commitment through dialogue and empathy occurred according to 50% of Board members. It can be suggested from this that there are higher levels of awareness of 'difference' at regional levels. It is also interesting to note that there is a higher level of consensus around these cultural values at

this point - in comparison to, for example, the roles and tasks of leaders and representatives within the organisation.

At national level, the Board members observed the following. The acceptance of cultural differences and focusing on similarities, and the development of an inclusive culture through overt negotiation and definition occurred according to 70%. The assertion of solidarity and valuing diversity occurred according to 60%. The creation of a comfortable milieu for all to participate occurred according to 50%. The clear recognition of differences and tolerance of differences occurred according to 40%. The creation of a sense of belonging, the creation of a sense of collective security and individual significance and the development of shared commitment through dialogue and empathy occurred according to 30%. These responses may reflect a lack of group identity or the non-existence of a strong, informal relationship base among the members of the Board. This was indicated in the patterns of communication between Board members, and Board members and the Chief Executive as outlined earlier.

The Board members suggested the following when they were asked if, when they observed these cultural values in operation, did they result from the formal activity or decision of the organisation, or did they occur informally.

In relation to the creation of a sense of belonging, 40% of the Board members stated this occurred as a result of a formal programme or policy. Regarding, the creation of a sense of collective security and individual significance, 30% of Board members said this occurred as a result of a formal programme or policy. The assertion of solidarity and valuing diversity occurred as a result of a formal organisation programme or policy according to 30%. The acceptance of cultural differences and focusing on similarities occurred as a result of a formal policy or programme in the organisation according to 30%. The development of an inclusive culture through overt negotiation and definition occurred as a result of a formal

programme or policy according to 20%. The creation of a comfortable milieu in which all could participate resulted from a formal organisation programme or policy according to 20%. The clear recognition of differences and tolerance of differences resulted from a formal programme or policy within the organisation according to 30% of Board members. The development of shared commitment through dialogue and empathy resulted from a formal organisation programme or policy according to 20%.

It can be suggested from these responses that little formal organisational programme, policy or strategy has been implemented in relation to the support of an organisational culture which values and utilises diversity within it - at all levels of the organisation.

Did the Board members believe a common vision of the future was held within the organisation? 80% replied that there was no shared or common vision of the future held within the organisation. This, perhaps, reflects the lack of consensus that emerged in relation to the role of leaders / representatives in the organisation and the lack of intensive strategic communication occurring between various groups in the organisation.

What about the approaches to dealing with conflict / difference at local, regional and national levels of the organisation as observed by members of the Board? At local level, the approach to conflict was described, for the most part, by Board members as 'constructive contention enabling development' and a 'non-adversarial problem solving approach in context of mutual understanding / values and recognition of difference'. At regional level, the approach to conflict was described mainly by Board members as 'constructive contention enabling development' (60%), 'non-adversarial problem solving approach in context of mutual understanding / values and recognition of difference'. Nearly a third felt it was approached as a threat to power and resources and had a win/lose focus. At national level, the approach to conflict was described by most Board members as 'constructive contention enabling development' and 'non-adversarial problem solving approach in context of mutual

understanding / values and recognition of difference'. Nearly a third described it as 'a threat to security, power, resources and influence'.

**Output:                    The Relationship between formal organisational change processes, patterns of participation in the organisational strategy cycle and organisational learning capacity**

During the period between 1997-2000, whilst the under participation of adult volunteer leaders and young people at local levels continued as before, the quality of participation at regional levels of the organisation increased. This created a situation whereby the strategy development, evaluation and implementation at national level had a stronger relationship with that at regional level. This was facilitated by the removal of historic structures (except for the Board and the A.G.M.) and the re-application of staff resources at national level to facilitate the process at regional level. In turn, this increased the communication opportunities available to National Office - reducing the relationship and communication gap.

The staff at National Office also became less marginalised as a result of alternative managerial approaches adopted by the Chief Executive. They also embarked on a process of joint vision creation and relationship building with the Board. This increased the level of engagement of National Office staff in the strategy development processes of the organisation.

In terms of strategy development process within the organisation, there appears to have been three groups who were under participating or non-participating at this point.

The first was young people who had little involvement in the formal structures / events / contact points currently organised by the national organisation. In their communication

with Board members, half of whom appeared to have regular relationships and frequent communication with young people involved with the organisation at local level, there was little involvement between the two in analysis and reflection or discussion with a future perspective. This suggests that their discussions did not relate to the strategic development of the organisation. They were not engaged in the development of communal understandings, knowledge, vision or strategy.

The second group were Adult Volunteer Leaders. The opportunities for engagement in organisational activities increased as the current policy of the Chief Executive took effect. This entailed the use of events and conferences that involved youth work practitioners in reflection and development opportunities related to youth work practice issues. It was also reflected in a consultation and policy development process on the theme of volunteer development that was undertaken during this period.

Most of the Board members had regular two-way communication with adult volunteer leaders at local level. For half, this related primarily to information gathering and imparting. For the other half of the Board members it also entailed reflection and analysis. This implied, therefore, that to some extent, in some places, adult volunteers were increasingly engaged, or will have the opportunity to engage, in discussions related to the strategic development of the organisation. The ongoing success of this appears to depend on the approach of the member youth services at regional level to facilitating it.

It appeared that the staff employed at regional level by member youth services was still a major channel of communication and informal influence in the organisation. The role these members of staff played in the process was therefore crucial in the degree to which adult volunteer leaders were enabled to participate. This is a key issue that has faced the organisation throughout its history. It is unclear whether the current strategy of the

national organisation addressed this factor consciously as part of its development and change strategy.

It has also been noted that the time and financial commitment required to participate in various organisational representative roles may be prohibitive for some people. This is reflective of the lack of developed consciousness or formal action at various levels of the organisation to develop an inclusive culture that allows people with diverse circumstances and backgrounds to participate at various levels of the organisation.

The third group consisted of Board members. The Board members appeared in at least half the cases to have had well-developed communication patterns with many sources of environmental feedback at local and regional levels. Similarly, in at least half the cases, these Board members engaged in the full spectrum of communication related to strategic thinking (information gathering, imparting, reflection and analysis, decision making) with these sources (with the exception of young people).

When considered in terms of their participation at national level, however, their patterns of communication indicated that the Board was not a cohesive group and did not have a strong, informal relationship base. This was reflected also in the communication patterns with the Chief Executive and the staff of National Office. This, therefore, is likely to have impacted on the levels of trust, development of common understanding, knowledge, vision and strategic thinking that could be generated at this level.

This under or non-participation can be understood in terms of the development of the organisation's culture over time. The patterns may indicate that at this point, there were almost two organisational cultures in operation, or at least conflicting norms and values within the culture. One may have related to the culture at the foundation of the organisation.



This had as a core value centralised authority and control, and was perhaps echoed in the 1989-97 period.

The second relates to the 'doctrine' of social education introduced to the organisation during its second period – during the 1970s. Could it be suggested that the official language of the organisation reflected this doctrine? The espoused values related to this but the theory in use, during the period 1989-1997 in particular, bore a closer relationship to the behaviours that dominated the organisation in its earlier period. That is to suggest the related behaviours were still informally in use.

This might also contribute to providing an explanation regarding the lack of consensus among the senior volunteer leadership of the organisation in terms of definition and roles of leaders and representatives, and the perception that there was no commonly held vision in the organisation or strong sense of ownership of the organisation. It may explain why the Board appeared not to be a cohesive group and why the relationships between Board and staff at national level were distant. It may also provide a basis of understanding of the patterns of communication and conflict that occurred in the organisation, and the apparent continuing reliance on staff at regional level as channels of communication - and therefore, apparently, their continued significant informal influence. It would also explain the low level of involvement of young people in the strategic processes of the organisation and, similarly, the adult volunteer leadership at local levels.

This indicates that the organisational culture precluded the participation of groups with alternative profiles to the organisationally dominant coalitions historically in the strategy development process and other formal organisational processes / structures - indicating an organisational learning and environmental scanning dysfunction.

The organisation's response to the participation difficulties in the period 1997-2000, enabled greater consciousness and participation of these under or non-participating members in the organisation's development and formal and strategic processes / structures of the organisation - with the exception of young people. A threat to the change strategy, however, was the developing Government Youth Service Plan, which, following a conference in early 2001, appears to have marginalised the role of the National Youth Federation. The change strategy may, in essence, have arrived too late.

During the final period under review, 1997-2000, the inhibitors of change appear to have been those inherited from the previous period of the organisation's history. These were the focus of the new change strategy. The Chief Executive took responsibility for the implementation of the strategy as it was the most significant piece of work challenging the organisation. The implementation process was resourced by the major redirection of National Office staffing. The change processes, whilst not delimited (i.e. they were designed to be responsive / reflexive to emerging needs), were connected to processes of regular review and evaluation. This ensured the potential for continual forward movement.

The one area of non-participation that appeared omitted from the change strategy was the participation of young people in the strategic process of the organisation. This appeared to be justified on the basis of the appropriateness and changing mission of the organisation as a development and service agency. The question remains, however, that as young people were a primary need source for the work of the organisation and member / non-member youth services, and source of pertinent environmental feedback, how was access to be achieved to this source of information, reflection and knowledge creation in the development of organisational strategy and its evaluation?

The remaining issue relates to the timing of the change process and the role the Chief Executive played in it. The Chief Executive inherited an organisation that was ill-prepared to meet the challenges and to respond innovatively and with acuity to developments in the world of youth work. It was clear that without his vision and conviction and strategy development skill, the internal change strategy in the National Youth Federation would not

have been undertaken or maintained by the organisation - or indeed have achieved the levels of success it did. The period since the Chief Executive took over coincided with one of the most politically charged in the world of youth work in Ireland in terms of the development of Government youth work strategy. In particular, this development posed a particular threat to the national organisation with the impending establishment of statutory youth services. This required significant and intensive engagement in this Governmental discussion and policy / strategy process, particularly in terms of the implementation of formal and informal influence strategies. The work also required the intensive involvement of the Chief Executive.

This raises the issue of the management of the implementation of the change process in the National Youth Federation. Was it appropriate that the Chief Executive was so heavily involved in its implementation? There appears to be three general issues to consider in this respect.

The first is that much of the initial phase of the change process was dependent on the vision, drive and strategy skills of the Chief Executive.

Secondly, the organisation had been suffering from under resourcing, not least financially, but also in terms of the managerial skill set available to the organisation at senior volunteer and staff levels. This was an inherited organisational problem. This also related to the staff culture at National Office that had evolved during the previous decade. This meant that the human resources available to the Chief Executive were not in a state of readiness for the implementation of the change process when he took over. The lack of cohesion among the Board membership also reflects this. Therefore, the Chief Executive was probably the only one who could have undertaken the lead role in the change management strategy both in terms of his readiness, and in terms of the structures of/ roles of various actors in the organisation that needed to be addressed in the first instance.

The third issue is simply one of timing. The fact that the organisation was not in readiness to deal effectively with its new environmental challenges can be understood as a symptom

of the learning dysfunction that appears to have existed in the organisation. This was such that the organisation did not appear to understand, or acknowledge, core issues in the need for change - and organise to manage it effectively - at an early enough juncture in its history.

## **Analysis**

In this review of the development of the National Youth Federation, the key issues that emerge in terms of the relationship between membership participation, organisational learning and strategic change, and therefore the impact of these on the effectiveness in achieving the organisational mission and responding to environmental challenges, are the following.

The culture of leadership at the apex of the organisation, and at the apex of the member regional organisations, emphasised centralised authority and control. This had consequent implications for the development of a sense of ownership of the organisation among other groups. It also had implications for the management methodology that was applied to, and the roles assumed by, other organisation actors.

During the second period reviewed, the mission of the organisation and the philosophical basis for this evolved such that it was in conflict with the established, unspoken, culture of leadership and use of power. Subsequently, both appear to have operated in tandem resulting in, what appeared to have been, a culture clash in espoused theory and theory in use within the organisation - particularly at very senior levels. As time passed, there was an increasing absorption with the current realities facing the organisation rather than its future vision and developments in its external environment. It became 'insulated' from its environment and from significant groups in membership of the organisation.

This situation resulted in an increasing use of informal power and influence and non-organisationally strategic political behaviours. This influenced the norms of behaviour in relation to conflict and difference management and communication. It encouraged a fear of participation in formal processes and structures among some groups, and the increasing influence of informal friendship and other networks - often controlling key resources in the organisation.

Ultimately, the representative structures were weakened, particularly in terms of the lack of cohesion at national level among members of the Board, and National Office staff. There

was a lack of commonly held vision and future. The levels of engagement in the strategy processes were reduced, as were the quantity and quality of sources of environmental information and reflection. The operation of the democratic processes and structures in the organisation reflected this situation and culture. They did not act as a balance to it.

The change strategy adopted in the final period sought to address these issues. The levels of success it achieved can be attributed to the cultural boundary spanning capacity of the Chief Executive of the time. The timing of the change project, and its resourcing, however, had implications for its ultimate success and the survival of the organisation. This was such that by the time the organisation embarked on an effective change strategy, it may have been too late. This reflects the preoccupation with current rather than likely future realities that developed at an early stage – a lack of vision.

It is suggested that this situation can be attributed to the insulating effect of the organisational culture, particularly in relation to the norms of senior leadership and their impact on general participation in the strategy cycle. This appears to have caused a serious learning dysfunction within the organisation impacting on its ability to engage in strategic change in a timely fashion in response to environmental challenges.

In terms of the study's hypotheses and research questions the following can be said.

The under or non-participation of certain groups of members in the strategic development functions of the N.Y.F. can be understood as a symptom of an organisational (system) learning dysfunction.

The process by which the dominant organisation culture in the N.Y.F. was established and maintained provides an explanation for the existence and perpetuation of such participation difficulties and learning dysfunction within it. This is in terms of the impact of this organisational culture on the patterns of participation of a diversity of organisational members / actors in the strategic development functions of the organisation.

The organisational initiative which appeared to have a chance of success in addressing these participation and learning difficulties in the N.Y.F., had as its focus change at a systemic organisational level rather than at a non / under participating individual member or group level only.

This change initiative addressed the effects of organisational culture on how and when the membership were involved in the organisational strategy development cycle particularly through its impact on:

- Communication;
- Management of internal conflict / difference;
- Organisational leadership, representative and membership roles.

Specific and congruent arrangements for the management of this systemic change, and a timeframe for its completion, through the statement of the time frame for the strategic plan, were put in place by the N.Y.F.

In addition to increasing effective membership participation, this change initiative increased the learning and innovative capacities of the N.Y.F. as evidenced by the increased ability of the organisation to engage in policy and strategic change - increasingly owned by the membership as evidenced by its level of engagement. This was a slow process, however, and may not have been sufficiently timely to ensure the survival of the organisation due to the pace of change in external environmental conditions. It would be worth reviewing the operation of the organisation in five years to establish whether this is the case.

## **Chapter Six: Case Study Report Two:**

### **The Irish National Teachers' Organisation**

Given the danger of unwieldy case study reports as discussed in chapter four, the approach adopted relates to a combination of two strategies proposed by Yin (1994) to counteract this problem. These were also outlined in the chapter four. In addition, the case study database is available from the author. This provides all evidence of triangulation, or the use of convergent lines of inquiry, to establish the 'facts'. All such detail is fully referenced to the data sources used. A comprehensive list of the data sources is included in the database, as it is below. For detail of all points made in the case study report, reference should be made to the case study database. The format of the report is in narrative form. This conforms to standard methodological practice in terms of case study research methodology and is, in fact, a necessary structure in order to promote an understanding of the evolution and the interconnections between the dynamics under review as discussed in chapter four.

As discussed earlier, the importance of theory in both case study and qualitative research methodology has been highlighted by Yin (1994), Strauss and Corbin (1991) and Pettigrew (1985). This relates to the importance of theoretical context for case study and qualitative research in terms of enabling replicability and representivity - its 'scientific' basis as discussed in chapter four. The Input Output Analytical Model, proposed in this study, has been utilised in the preparation and structuring of this case study report. The model has been developed on the basis of the key themes emerging from the literature review and directly relates to the study's propositions, hypotheses and research questions - in addition to the question metrics attached to the model. It emerges from and is fully grounded in the study's conceptual framework. It has been the instrument guiding the collection, structuring and analysis of the case study data. The approach, therefore, meets the conditions regarding theory in the development of this case study as outlined and discussed in chapter four



The data sources used in the development of the Irish National Teachers Organisation Case Study included:

**1. Archival Documentation and Records:**

- I.N.T.O. Central Executive Committee Annual Reports to Congress including reports from the Equality Committee and Education Committees where they were included 1978-2000
- Minutes of Central Executive Committee 1979-2000
- Minutes of Education Committee 1980-2000
- Minutes of Equality Committee 1987-96
- Participation of Women and Men in the I.N.T.O.: C.E.C. Position  
C.E.C. Minutes 5/10/91 appendix 1
- C.E.C. decisions regarding gender participation in the I.N.T.O. not requiring rule changes  
C.E.C. Annual Report to Congress 1992: 4.1.7
- Rule changes proposed by the Equality Committee  
Equality Committee Minutes: EQC268
- I.N.T.O. Bulletin to Branch Secretaries (October 1994)
- Review of the Role of the C.E.C. Representative: Final Report to Congress (1996)
- Final Agenda Congress 1999 including extracts from rules governing Congress procedures and standing orders (April 1999)

- Letter to delegates of Special Rules Congress from General Secretary stating the rule changes to be decided (June 1999)
- Branch Report by Central Executive Committee Representative for District X11 (May 1999)
- Agenda and Evaluation of Joint National Committee Seminar including reports on Central Executive Committee, Equality Committee and Education Committee discussions (October 1997)
- Brief of Trade Union Training Review, CEC Report to Congress 1995-96
- Trade Union Training Strategy (1996)
- Report on Training Committee Review Seminar (9th June 1998)
- I.N.T.O. Professional Development Programme: A Driving Force for Change  
Information Brochure (1999)
- Research Brief for the I.N.T.O. Participation Study, C.E.C. Standing Committee 1 Minutes (25/6/88: SC1110)
- Participation in an I.N.T.O. Branch : Report on a Study by the Sligo Branch of the I.N.T.O.(1996)
- I.N.T.O the Future  
McCarthy E, (1991) I.N.T.O.
- I.N.T.O. Policy on Gender Equality (1984)
- Brief of I.N.T.O. Equality Officer, C.E.C. Annual Report to Congress 1985
- I.N.T.O. Mainstreaming Equality Policy 1994/95,
- Equality Committee Review 1996-99: Evaluation Questionnaire
- Equality Strategy 1999-2000 (May 1999)
- Equality Committee Discussion Document on the
- Promotion of Participation in the I.N.T.O.

(20th February 1999)

- Report of the Equality Committee meeting on the Criteria for Effective Membership Participation - Draft (June 1999)
- Draft Equality Committee Reports on Participation at Equality Committee, Branch, School Levels (1999-2000)
  
- Statistics available in relation to gender breakdown (1989-2000) in respect of officer-ships throughout the I.N.T.O. structures (delegates to Congress, speakers at Congress, gender patterns of participation of district representatives on CEC in terms of length of office and becoming President of INTO 1978 -2000, and district by district in terms of C.E.C. Representative, Education Committee representative and Equality Committee representative)  
Data Source: I.N.T.O. C.E.C. Annual Reports to Congress 1989-2000
  
- Survey of C.E.C., Equality Committee and Education Committee Members (Breathnach 1996)
  
- Early Retirement PCW Ballot: Ballot figures for / against, and total membership in branch and per cent age of membership (by district)
  
- Conciliation and Arbitration Scheme Ballot: Ballot figures for/ against, and total membership in branch and per cent age of membership who voted (by district)
  
- Attendance figures, branch A.G.M.s in 1999
  
- Management Rules in a Teachers' Union. Case study of the INTO  
Byrne C. (Assistant General Secretary) (1998) Unpublished Dissertation

- An Examination of the Committee Structure as a Development Agent in the INTO  
Jordon E. (Official) (1997)  
Unpublished Dissertation
- History of the INTO 1868-1968 (O'Connell 1968)
- Audio tapes of INTO Special Rules Congresses 1992, 1995

**2. Direct Observation:**

- Meeting of the Central Executive Committee (March 1999)
- Congress (April 2000)
- Two meetings of the Equality Committee (February, June 1999)
- Four branch meetings debating the membership rule changes in 1999 - two rural and two urban, Dixtrict XII and *District???* (May - June 1999)
- Special Rules Congress (June 2000)

**3. Tape-recorded (audio) open-ended interviews with:**

- Sen. Joe O'Toole, General Secretary I.N.T.O. (1989-2002)
- Mr John Carr, Deputy General Secretary / National Treasurer (1989-2001)
- Ms Catherine Byrne, Assistant General Secretary (1994-2001)
- Ms Deirbhile Nic Craith, Senior Official with responsibility for the Equality and Education Committees (1991-2002)
- Mr Denis Bohane, District Representative to the C.E.C. for District XII
- Ms Shiela Nunan, District Representative to the C.E.C. for District VIII

#### 4. Survey by written questionnaire

Survey of the total membership of the I.N.T.O. Central Executive Committee, Equality Committee and Education Committee (the three main national level representative committees - forty -eight members in total). This was distributed by the Senior Official with responsibility for the Equality and Education Committees and returned during April - May 2000. There was a 70% response rate.

The complete data utilised in this case study report are fully referenced in the case study database. The database is structured according to the chronological development of the I.N.T.O. The following references to the I.N.T.O. Case Study Database, which provide access to the more specific references listed above, are:

I.N.T.O. Input Output Analytical Model Part 1: I.N.T.O. Case Study Database pages 2-3;  
I.N.T.O. Input Output Analytical Model Part 2: I.N.T.O. Case Study Database pages 3-46, 86-130;  
I.N.T.O. Input Output Analytical Model Part 3: I.N.T.O. Case Study Database pages 30-145.

### **Analytical Summary**

It is suggested that within the I.N.T.O. the dominant organisational culture precluded the participation of groups with alternative profiles and cultural norms to the dominant one of the organisation in communal processes of analysis and envisioning. This was in terms of their participation in the strategy and other formal processes and structures in the organisation. This led to a level of environmental insulation among activists and leadership and the under development of organisational processes to enable effective environmental scanning, reflection, decision-making and implementation. In turn, this resulted in an inability in the organisation to bring about strategic change in line with the organisation's changing external environment and its increasing complexity.

The key factors impacting on the learning, and therefore the strategic change, capacities of the I.N.T.O. were the following. One set of cultural values and norms of behaviour completely dominated the organisation. These became highly institutionalised in the structures, rules and procedures of the organisation in addition to the informal norms of behaviour. This resulted in a paternalistic culture where the general membership was passive in their engagement with the I.N.T.O.

This created a situation where the leadership / activist groups became insulated from divergent perspectives, experiences and sources of information and reflection. In general, the need for internal change was therefore unrecognised among the dominant activist group. This was even in the face of external expert input identifying the need for this. When internal demands for change arose, it was interpreted as a threat to the power and influence of the leadership / activist groups.

The democratic structures reflected the culture of the dominant group and therefore enabled its participation. They did not act as a balancing opportunity in terms of membership participation. When the profile of those participating in the representative structures altered, the culture of those structures / regulations / rules remained the same - thus continuing to ensure the exclusion of diverse perspectives.

Within an increasingly complex external environment, the need for the organisation to change also increased. The strains in the culture of the organisation became apparent at this point as the relationship gaps between the general membership, activists and the leadership widened. This was evident in the nature of discussion and adversarial conflict, and increased levels of non-participation, in the various structures of the organisation. This was to the extent that the power of the organisation began to be undermined.

This was a result of the I.N.T.O. being unable to recognise the need for the required internal change at an appropriate time, to create a sense of readiness for change among the membership and activists, and to institute a properly resourced, managed, system wide, change strategy. This reflected a significant learning dysfunction impacting on the strategic change capabilities of the organisation - and therefore its ability to achieve its mission to greatest effect and respond effectively and in a timely fashion to environmental challenges.

In terms of this study's hypotheses and research questions, the following was found in relation to the I.N.T.O.

The under or non-participation of certain groups of members in the strategic development functions of the I.N.T.O. can be understood as a symptom of an organisational (system) learning dysfunction.

The process by which the dominant organisation culture was established and maintained in the I.N.T.O. provides an explanation for the existence and perpetuation of such participation difficulties and learning dysfunction within this organisation. This is in terms of the impact of this organisational culture on the patterns of participation of a diversity of organisational members / actors in the strategic development functions of the I.N.T.O.

The focus of attempted change within the I.N.T.O. in respect of these issues was at a non / under participating individual member or group level only. This approach did not succeed in addressing these participation and learning difficulties. This was demonstrated by the increasing difficulties experienced in the I.N.T.O. in terms of the willingness of the

membership to support the leadership in undertaking necessary, organisationally strategic, change in response to environmental challenges, impacting on the future survival of the organisation.

These change initiatives in the I.N.T.O. did not address the effects of organisational culture on how and when the membership were involved in the organisational strategy development cycle particularly through its impact on:

- Communication;
- Management of internal conflict / difference;
- Organisational leadership, representative and membership roles.

Specific and congruent arrangements for the management of systemic change, and a timeframe for its completion, were not put in place by the organisation.

Therefore, the organisation did not succeed in increasing effective membership participation, and did not increase the learning and innovative capacities of the I.N.T.O. As a result, the ability of the organisation to survive and thrive into the future remains in doubt. This experience highlights the relationship issues in learning between the individual member and the organisation as actions to increase the learning of individual members occurred but these have not translated into the increased learning and strategic change capability of the organisation.



**Input output Analytical Model (Part One):**

**The development of organisational culture at the foundation of the Irish National Teachers' Organisation**

**Input: Profile of the founding membership**

The organisation was established in 1868. The basic unit of membership was the individual primary school teacher or assistant teacher. All were eligible for membership regardless of status or gender.

Only male principal schoolteachers were eligible to run in elections and only they were eligible to be members of the senior management committee of the organisation.

There was an annual general meeting at which elections to the Central Executive Committee were held. The Central Executive Committee was representative of the local teachers' associations that were dotted around the country (north and south). The Dublin Central Association ran the organisation on behalf of the C.E.C. As the C.E.C. did not meet in the early years, the D.C.A. took over their function to a large extent. The elected National Secretary of the management committee became a paid position, so, subsequently did the position of National Treasurer.

Later in the period, a change in the rules occurred which allowed two male assistant teachers to be elected to the C.E.C. One represented the north of Ireland and one the south.

**Decisions regarding structures, rules and procedures**

The organisation was originally established through two national conferences - or congresses as they were called. The first agreed the need to establish the organisation and the second, held within the year, agreed its constitution, objects, structures, operation, method of funding and so forth. Delegates from local teachers' associations attended these events.

The structure of the association was defined as the central management/ executive committee, county associations and local associations. It was agreed that an annual congress would be held (annual general meeting) which delegates from county and local associations would attend. The positions of National Secretary and National Treasurer of the organisation would be elected by general ballot of the membership.

The Central Management Committee was established as the supreme decision making body / authority of the organisation between annual general meetings (known as Congress). This was representative of local associations. The elected National Secretary became a paid position. The Dublin Central Association was given responsibility to act as an executive committee under the control of the Central Management Committee.

Each individual member of the I.N.T.O. had to pay a membership fee proportionate to the number of paid-up members in the local association.

Resolutions were proposed and adopted at Congress annually. Elections to the Central Management Committee also took place at this event. Only male school principals were allowed to run in elections. Towards the end of the period two male assistant teachers were also elected to the committee. Women, though allowed to join, were barred from running in elections.

An Audit Committee was established with four elected representatives - one from each province.

In 1889, new rules regarding elections and the operation of Congress were introduced due to difficulties that had occurred. The Central Executive Committee (now renamed) was elected on the third day of Congress. There were new rules governing the election of the committee - every member of the organisation had a vote in this election.

During this time, the Treasurer's yearly statement of accounts was examined without reference to or consultation with the local associations.

Rules were made, altered or resolved according to need during this period. This has been suggested by O'Connell (1968). The organisation appeared to adopt a pragmatic approach. Rules were there, he suggested, to bring a certain order to the proceedings. They were not there to hinder or obstruct any form of activity that the occasion demanded.

**Behavioural norms - communication, conflict / difference management, formal / informal organisation roles**

Within the structures of the organisation - particularly outside of local associations - communication, relationship development, negotiations and all organisational business was carried out by male school principals only. The members of the structures were likely to have had a strong sense of commonality as a result of their common profile. Women did not participate.

The Dublin Central Committee had a particularly strong influence on the national development of the organisation as it acted as an executive committee in the absence of the Central Executive Committee meeting. This was probably due to issues of resourcing and difficulties associated with travel at the time. The members of the Dublin based committee were likely to have had a stronger informal relationship base than the senior organisation committee. This was simply a result of their proximity and ease of access to each other and meetings - at least in comparison to those with a greater geographic dispersal countrywide.

Whilst, even in the early years, the organisation took action against acts of discrimination, at annual Congress decisions were taken to limit papers presented, and resolutions proposed, to those that were non-sectarian or Political. This approach extended, however, to those papers and resolutions that were considered to be politically sensitive and which might impact on relationships with the Government / education management.

It appears that during this period there were abuses of the organisation's electoral system. Reports of caucus meetings and canvassing that caused difficulties at Congress exist. There were charges and counter charges of undue influence and corruption. It was felt, at the

time, that this situation weakened the confidence of the membership in the Central Executive Committee. This resulted in the rule changes of 1889.

As a result of these circumstances, leadership / representation in the organisation was male and based on the senior levels of the teaching structure. In the early years, there appears to have been a Dublin bias. There was no female influence, and little reflecting the experience of assistant teachers. From early on, there was a paid National Secretary and Treasurer - emphasising the leadership role of elected full time staff in the organisation.

It is apparent that leadership at various levels in the organisation adopted political behaviours to resolve issues - although the extremes of this were a matter of concern to the general membership. The rule changes in 1889 that ensured each member of the organisation had a vote in the C.E.C. elections were in response to this. There also appears to have been a strong external focus in the organisation in terms of the issues addressed, and the consciousness of the need to develop relationships with kindred organisations in Ireland and abroad.

**Output:        Patterns of organisational participation and their  
                         relationship to the formation of organisation culture at the formation of  
                         the Irish National Teachers' Organisation**

During the formative period of the organisation, the patterns of participation of the membership in the strategy development / formal processes / structures of the organisation reflected the rules of the organisation adopted at the outset. Male, school principals were the only ones enabled to engage in the representative and leadership structures - and therefore the strategic and formal processes of the organisation.

This meant that both male assistant teachers and all women teachers could not and did not participate in the strategy development/ formal processes / structures. Towards the end of the period at the turn of the century, due to a rule change, two male assistant teachers representing the north and south of the country were elected to the C.E.C.

Patterns of under or non-participation therefore related to male assistant teachers and all women teachers.

The male, school principal group of teachers who dominated the organisation's leadership for the first c. forty years of its existence, established the norms of participation and general cultural norms of the organisation in formal and informal terms. This is reflected in the fact that the rules adopted prohibited male assistant teachers and all women teachers from participating in the higher structures of the organisation.

This indicates that the organisational culture precluded the participation of groups with different profiles in the strategy development process and other formal organisational processes / structures. Evidence from the period is not available to suggest this impacted on the organisational learning and environmental scanning functions at the time. It is clear, however, that the absence of male assistant teachers and women teachers reduced the amount and diversity of environmental information, and reflective capacity, available within the strategic development processes.

It is interesting to note in this respect, however, how the organisation challenged many acts of discrimination against women teachers during this early period. When the fact is considered that this would have challenged the educational establishment at the time, and may have run counter to social norms, it is a matter of some significance. It suggests a strong belief in just treatment for all teachers and empathy with the women teachers involved in the situations. This suggests the existence of particular values among the leadership group.

**Input: Profile of the membership**

Between 1907-69, the basic unit of membership remained the same - individual primary school teachers regardless of status or gender. At this point c. 60% of the membership was female. The organisation operated in the Republic of Ireland and in Northern Ireland.

In 1907, new rules were introduced. Two women were allowed to become members of the C.E.C. - reflecting the practice in relation to the election of two male assistant teachers adopted towards the end of the earlier period. Subsequently, in 1911, the first woman Vice-President of the organisation was elected. She became President the following year. This meant that during these years, three women participated on the C.E.C.

Between 1917-19, radical changes were introduced in the I.N.T.O. The underlying principle involved was the equality of all members to participate at all levels of the organisation and in all its processes. After this, few women were elected to the C.E.C., and indeed, the intermediary structures of the organisation. Those who were elected only remained for a short time due to illness, change in jobs and other reasons. The next female President was not elected until 1945. Two were elected in the 1950s, one in the 1960s and one in the 1990s - this is despite the fact that women were in the majority of the membership since 1919 at least. No female General Secretary or National Treasurer was elected. The original profile of the members of the C.E.C. and the other structures in the organisation remained the same.

Between 1970-1987, due to the indirect impact of E.U. directives, the number of women teachers increased with consequent decreases in the number of men. This meant that the percentage of female membership of the I.N.T.O. increased further. The knock-on effects of this included that male members tended to be older than female.

No female General Secretary or National Treasurer was elected. No female President was elected. Participation at each level of the organisation became increasingly imbalanced in terms of gender - this included delegates to and speakers at Congress. The general patterns of participation of previous eras continued.

During the 1980s, the first female trade union official was appointed - formerly a primary school teacher. She became the first (part-time) Equality Officer in the organisation, in addition to the rest of her brief. This role had a gender equality focus.

A new leadership group with a gender equality focus began to emerge nationally during this period. This involved some of the younger members of the C.E.C. (who conformed to the traditional profile of the organisation's leadership), the Equality Officer and I.N.T.O. delegates (women) who attended the Irish Congress of Trade Union's Womens' Conference.

An Equality Committee was established in the 1980s. The membership was largely, and exclusively as time passed, female. This was in complete contrast to the other committees at national level that had a predominantly if not exclusively male membership.

Between 1988-1996, a new General Secretary and National Treasurer were elected. These were members of the new leadership group who had begun to emerge as mentioned. Both conformed to the traditional profile of the leadership of the organisation. Both, however, had a developed interest in educational issues rather than solely industrial relations perspectives. They believed that if the organisation was to develop and increase its influence, its agenda had to expand to include the 'professional' profile and environment of the membership.

McCarthy (1991) undertook a major study of the patterns of gender participation in the organisation on behalf of the I.N.T.O. The findings showed that, in 1989/90, 75.6% of the membership was female, 24.4% male. The proportion of women active on national

committees was described as uniformly poor for the Accounts Committee, Education Committee, Benefit Funds Committee and C.E.C.

More married men than women were in membership of the organisation (77.6% compared to 64.9%) and more single women than single men (31.1% to 21.8%). This was reflected in the numbers of men and women who had children (74.7% to 60.3%). The majority of members were in the age range 30 -39yrs. More men than women were in this age grouping (47.6% to 37.1%). Younger teachers between 20 -29yrs accounted for 26.2% of the women and 12.4% of the men.

79.9% of the male membership reported joint responsibility for the running of the home, 33.2% of women reported they were solely responsible. 40.8% of men were the sole breadwinners in the family, 81.2% of women were not the only source of family income.

43.2% of the male membership was school principals. 7.8% of the women held this position. The majority of women were assistant teachers (57.6%) compared to 30.8% of the men. 22.4% of women occupied posts of responsibility compared to 18.9% of men.

71% of the men had attended teacher-training college at St Patrick's College Drumcondra. 44.2% of women had attended Carysfort College. 63.3% of the men held a teaching diploma whilst 53.4% of the women held degrees reflecting the age breakdown and changes in teacher training during the 1970s.

48.8% of men had been members of the I.N.T.O. for 11-20 years, only 35.8% of the women had. 38.1% of the women had been members for 1-10 years, 24.5% of the men had. 26.8% of the men had been members for more than 20 years, 26.1% of the women had. 95.8% of the membership had attended a branch meeting at some stage.

61.6% of school staff representatives were women. This is the most local level of organisational involvement. The role had no structural link to branch or any other structure in the organisation.



Men occupied the majority of the two key positions at branch level:

- Chairpersons (69.1%)
- Secretaries (66.2%).

At branch level, the majority of branch organisers were women (54.5%) as were branch committee members (55%). Vice-Chairperson positions were evenly divided between the sexes.

Men occupied the majority of District Committee positions:

- Chairpersons (60%),
- Treasurers (66.7%)
- Secretaries (73.3%).

86.7% of C.E.C. representatives (District Representatives) were men.

The overall participation in representative and elected positions in the organisation was as follows. 33% of the membership had served in the role of Staff Representative (school level). 12.2% had been members of a Branch Committee. 6.7% had been members of a District Committee. 5.1% had acted as Branch Chairperson. 4.4% had been a Vice-Chairperson. 3% had been a District Secretary. 2% had served on a national committee.

### **Communication, conflict / difference management, participation styles and roles**

#### ***Structural Context***

In 1911, there was a move to increase the representivity of the C.E.C. Two women teachers (representing the north and south of the country) were included in its membership. Initially, these were appointed by Congress and subsequently elected at Congress until 1918.

In 1910, new election rules were introduced. These entitled every member to cast a vote in the C.E.C. election by secret ballot, and to post it to a firm of auditors acting as scrutinisers.

Between 1917-1919, radical changes in electoral-areas, and the Constitution, of the I.N.T.O. were adopted. The underlying objective of these was to enable the equality of participation in the organisation of all members. Four electoral districts were established. Elections were open to both men and women and all classes of teachers. All higher positions in the organisation were open to all members. Election to these positions was based on an all Ireland, one member-one vote system.

In 1947, a Rules Congress was held. This reintroduced single member constituencies for the C.E.C. Ten electoral districts were established. Any member could be elected to represent a district. The President and Vice-President continued to be elected on a one member-one vote organisation-wide basis by postal ballot. The outgoing President became an ex-officio member of the C.E.C. for one year after his or her Presidency. County committees were established.

Later, in the 1960s, a Special Committee was established by Congress to investigate:

- The general structure of the organisation;
- The role of the organisation in educational matters;
- The financial machinery of the organisation;
- Other related matters.

The aim was to enable the modernisation, and enhance the prestige, of the organisation.

The committee reported to the Rules Congress held in 1967. The changes it proposed included:

- The omission of county committees and their replacement by thirteen districts. These were often unwieldy and covered unnatural geographical areas. These had similar functions to county committees - arranging branch areas, settling local disputes and so forth;
- District representatives were given the responsibility for one clearly defined district with the aim of achieving closer contact with constituents.

Contrary to stated intentions, the new rules adopted during this period did not result in the increased participation of women at C.E.C. level of the organisation. In fact, given that there were no longer reserved seats for women on the C.E.C., the levels of participation dropped. This was in the context of the membership of the organisation becoming increasingly female - however, their approach to membership was largely passive.

The male profile of the members of the C.E.C. continued and in many instances school principals continued to be elected. The General Secretary and National Treasurer also continued to be elected from this group.

*Communication, conflict and difference management, participation styles and roles*

Throughout the period, as has been mentioned, a number of changes in the electoral districts to the C.E.C. occurred. In general, and particularly by the end of the period, the size of the districts and their geographic spread was such that it impacted on the distances to be covered by the C.E.C. representative (when attending local branch meetings and so forth), communications and relationships. It meant that those who could perform this representative role needed to be very focused on the role at the expense of other aspects of life / personal responsibilities.

Politically, branches were the important structure, not districts. The operation of the organisation and its representative structures encouraged narrowly reactive political, rather than strategic, behaviour. The operation of branches was extremely rule bound and procedurally laden.

The 1970s and 1980s saw the publication of various international reports on the impact of gender issues in education, and on the professional life of teachers. At the instigation of the newly appointed female I.N.T.O. official, a survey on gender issues in Irish primary schools was undertaken by the organisation. It was a joint project undertaken in partnership with two external agencies. The report identified the dominance of male experience in the education system to the detriment of women teachers and pupils. These issues related to organisational culture within the education system.

The research resulted in the I.N.T.O. undertaking campaigns to influence the Department of Education on related matters, and attempts to engage members at various levels of the organisation in these issues. Following the publication of the report, the I.N.T.O. undertook the following:

- To include gender 'equality' issues in trade union training;
- To organise a national seminar on the report and related matters;
- To propose a gender equality policy for adoption by the organisation;
- To appoint an Equality Officer;
- To establish a gender focused 'Equality' Committee.

Branch and district levels of the organisation were asked to discuss and comment on gender equality issues (job sharing), and to send delegates to the seminar organised on the issue by the I.N.T.O. The interest and up take was low - requiring the C.E.C. members to try to stimulate interest in their respective districts.

Following the seminar, Standing Committee 1 of the C.E.C. (i.e. subcommittee) was assigned special responsibility for gender equality issues. The C.E.C. tabled a motion on Gender Equality Policy at Congress 1984. It was adopted. This stated that:

- All should enjoy equal opportunities;
- Programmes, particularly educational programmes, were required to address gender imbalances;
- The I.N.T.O. would act as a change agent in support of this internally and externally to the organisation.

The only female official in the organisation was assigned responsibility for gender equality issues - this was only part of her extensive remit.

As described earlier, a new leadership group focused on gender equality began to emerge nationally during this period. There was a strong informal relationship network among at

least some of the members of this group. These appear to have prompted the establishment of the Equality Committee.

Prior to the Special Rules Congress held in 1987, a motion to establish an Equality Committee was put to the C.E.C. There was a split in the vote with a powerful minority involving all the senior leadership of the time, and those who held the position of President for a number of years after, voting against it. This included the General Secretary and National Treasurer. They had their dissension minuted. The motion was passed, however. The stated reason of the minority for voting against the motion was that such a committee might delay further progress regarding the achievement of 'equality' at highest decision-making levels of the organisation.

The impact of the motion was reduced as it was stated by the leadership that these new rules had to be registered with the Registrar of Friendly Societies before they could be implemented. An alternative proposal was put forward and accepted. An advisory committee was established by the C.E.C under existing rules. This reduced the level of independence of the new Equality Committee to a very large extent and put it under the complete control of the C.E.C. The Equality Committee provided the first opportunity for the input of women at national level of the organisation. This was severely curtailed and controlled, however, by the manner in which the committee was ultimately established by the C.E.C.

Resistance was evident to these structural changes among the traditional leadership in the organisation. This was indicated in the political activity at C.E.C. level reducing the impact of the establishment of the Equality Committee. At district and branch levels, it was evident through disinterest and non-response to requests related to gender equality issues.

Through the use of the democratic structures and procedures of the organisation, the Equality Committee created a strategic space within the organisation for the gender issue to be explored. Its capacity was reduced, however, due to the political reaction to its control adopted by the senior leadership of the organisation.

In 1988, the Equality Committee proposed to the C.E.C. that a study into participation of men and women in the I.N.T.O. be undertaken. This sought to:

- Quantify patterns;
- Identify factors affecting participation (including rules, constitution, structures and functions);
- Recommend a programme of action to address the participation of women within the organisation.

The final report was published in 1991.

The study (McCarthy 1991) found that school level staff representatives used informal communication. Those occupying the role were found to be approachable and socially integrated. This may have been a reason why women members identified them as being an important aspect of the I.N.T.O. This reflected Keher's (1993) finding that local presence was an issue in enabling the participation of women in organisations. Staff representatives were, however, felt to be relatively un-influential in the I.N.T.O. The school was found to be an important factor in the socialisation of members into the organisation.

Communication and involvement were highlighted as being central to the I.N.T.O. life in the school.

The study also suggested that there was an indication that the membership would welcome more information on the I.N.T.O., and that they read the organisation's magazines. These provided topics of discussion among teachers. The members registered a "lack of keen involvement" at school level in I.N.T.O. matters. 50% of them expressed satisfaction with the services provided by the organisation. 73% felt school principals were supportive of the INTO. The majority of members supported attendance at I.N.T.O. training courses.

52.7% of members felt that they received a great deal or sufficient information from the INTO. 83% felt that they were well informed about branch committee activities. Higher-level committees were unfamiliar to the membership. Those who felt they were more

informed, were also more positively disposed towards the culture of the I.N.T.O. and were, therefore, more likely to be involved.

They found it difficult to 'talk out' at Congress and that Congress was very formal.

Members expressed reservations regarding the levels of communication with the membership of the results of work undertaken at national level.

"Members endorsed improved two way communication (with national level of the INTO) where they would be directly heard ...The over riding feeling which is evidenced is one of challenge for the evolution of future modes of decision-making, information and communication. A challenge for the evolution of future modes of communication is that of greater contact, feedback and immediacy between the 'ordinary' member and those who are active at higher levels" (McCarthy 1991:9.9).

50% of members reported that they found speaking at branch meetings intimidating. It was felt that branches were reluctant to try new and innovative ways of doing things. Those members who had been involved on branch committees were more favourably disposed towards the structures. The McCarthy (1991) study also reported a sense of 'cliquishness' experienced by members in the operation of branches. They were not felt to be occasions where young or female teachers could exert influence. Women felt their voices were unheard by men in the organisation or in the centres of leadership, and that they experienced a paternalistic attitude and approach from men. Both male and female members agreed that involvement in I.N.T.O. meetings could be an alienating experience for women. The members also felt that the operation of branch meetings militated against the achievement of agreement.

The membership considered the following five components the most important in the organisation:

1. The complete membership
2. The General Secretary
3. The C.E.C.
4. Staff representative
5. The Branch Secretary.

25% of members had attended Congress. A similar percentage expressed an interest in doing so in future.

The membership felt leadership did a good job. Head Office was seen to be bureaucratic and to be handicapped by this.

There was a low level of perceived influence over decision-making in the INTO - 9.7% of the membership felt they had influence.

“Upward influence can be understood as a sensitive index of the quality of participation and is positively correlated with satisfaction and with self-involvement ratings” (McCarthy 1991:11.8).

Members felt that to be involved required both personal characteristics (such as confidence, assertiveness) and behavioural factors such as regular attendance at branch meetings, knowledge of I.N.T.O. rules (of which there were many) and the ability to speak at meetings. The organisation was seen to be strong, powerful and protective, supportive and caring of its members.

Teaching and professional issues were identified as factors acting as encouragers to participation. The members appeared to make a differentiation between making a commitment to a teacher's cause and a commitment to trade unionism. The attitude to trade unions appeared to be either ambiguous or negative

The responsibility associated with active involvement in the organisation was viewed negatively. Behavioural and attitudinal involvement in the organisation was low. Members did not have an intention to become more involved in the organisation in the future. Those who had held office in the organisation were more likely to be more committed to the organisation's role as a trade union than those who had not.

At the school level, gender emerged as a salient differentiating factor in terms of perception and participation. Women held more positive attitudes than men of the organisation, regardless of whether they were actively involved or not. Men who had not held organisational office had the most negative views of the organisation of the I.N.T.O.,



branch meetings, district structures and Congress. Women members perceived participation on the C.E.C. as difficult due to the multiple roles this entailed when combined with home and work responsibilities. This was a view agreed by male members.

The report found that branch level processes were effective, informative, and educationally relevant, by members. Members attended branch meetings for functional reasons - to hear about the INTO and from the C.E.C. They were not self-related reasons, for example to contribute to policy discussion. Non-attendance at branch meetings appeared to be unrelated to lack of home support, transport problems or venues. Timings of meetings did not appear to impact.

“The branch was seen to be a relevant and positively evaluated structure, whilst the branch at committee level is seen to facilitate and increase this favourable outlook” (McCarthy 1991:7.9).

The ‘District Committee’ received a low ranking as an important component of the organisation. The level of knowledge of their district held by members was low. The structure did not represent one that was energising or innovative for many respondents.

Congress was found, by those who had attended it, to be sociable (89%), interesting (66%) and satisfying(63%) professional (88%) and efficient (92%). It was felt to be more male oriented (60%) than female oriented (6%).

“...the over-riding impression of Congress is in terms of a traditional/ conservative and relatively inflexible structure. The structure ...is described as formal and ‘difficult in talking out’. It is also perceived as less of a place for younger teachers than for older teachers...The perceptions of Congress is of being traditional and conservative with a strong in-group” (McCarthy 1991:9.8).

Finally, the McCarthy (1991) study found that both men and women who were behaviourally involved were found to hold the most positive attitudes / perceptions of branch meetings, district structures, branch culture and dynamics, and the strategic apex of the organisation - in comparison to those who were not involved. Holding office predicted a favourable attitude to core aspects of the I.N.T.O. This was found to override gender as the salient independent variable. Behavioural involvement was seen to be a significant issue. This was strongest at branch and higher levels of the organisation.

Holding office differentiated those who were satisfied with the degree of information received and overall satisfaction with the organisation from those who were not satisfied. Accessing information from committees was also related to this. Intentions to become more involved were stronger amongst those who were already active.

The C.E.C. response to the McCarthy (1991) study was as follows:

- The C.E.C. requested one of its standing committees (subcommittee) to allocate time for a presentation by Dr McCarthy of the results of the study to Congress;
- The C.E.C. circulated copies of the report to delegates at Congress;
- The C.E.C. circulated copies of the report to branch secretaries;
- The C.E.C. published a summary of the report in the June edition of the Tuarascáil periodical (i.e. made it available to all members);
- The work of the I.N.T.O. national committees (i.e. the Education Committee and the Equality Committee in addition to the C.E.C.) was highlighted, including the level of commitment given by members of the committees;
- The Standing Committee 1 of C.E.C. considered rule changes arising from study (including limiting terms of office of district representatives on national committees);
- The C.E.C. undertook a review of the role of the district representative to the C.E.C.;
- The C.E.C. requested district committees to discuss the report before the end of the school year;
- The C.E.C. requested branches to discuss the report at the October quarterly meetings and to convey their views to the C.E.C. through their district representatives.

In April 1991, the Standing Committee 1 of the C.E.C. considered rule and structural changes and set September 1991 to propose these to the C.E.C. It undertook to consider:

- Reserved seats for women on the CEC;
- Structural links between staff representatives and branches;
- Fixed terms of office for branch and district representatives;

- Review of the district committee structure;
- Review of the role of the C.E.C. representative.

The CEC agreed to hold a seminar on the participation issue in the summer of that year. The General Secretary Designate undertook its organisation. Members of the study advisory group, who were not members of the C.E.C., were also invited to attend. The Equality Committee requested that it be enabled to attend. This committee had originally initiated the idea of undertaking the research into patterns of participation. The C.E.C. invited the members to attend the presentations being made. They were not invited to participate in the discussion.

The General Secretary Designate stated that the most useful role reserved seats on the C.E.C. could play was a symbol of the organisation's commitment to the participation of women and as role models for other women.

A Special Rules Congress was held in 1992. A motion was put to it that a number of seats for women be reserved on the C.E.C., and that the length of terms of office to elected positions in the organisation be delimited. Both motions were defeated by a majority - and the debate was extremely conflictual and bruising. Activists saw the proposals as a form of 'reverse discrimination' against traditional activists. They appeared to feel that such measures would result in a potential waste of human resources - and their exclusion. The defeat meant that, by rule of the organisation, similar motions could not be put forward for a further three years. The defeat and its acrimonious nature were reported to have had a strongly demotivating impact on the Equality Committee.

Another Special Rules Congress was held in 1995. A motion on limited terms of office was put forward and was again defeated. On this occasion, the motion was actually passed by a majority, but the required two-thirds majority was not achieved. Neither was the debate as negatively conflictual as in 1992. The General Secretary attributed the change in the organisational climate to ongoing discussion and debate in the organisation in the intervening period. It could equally or additionally have been influenced by the gradual

increase in the numbers of women participating in the structures. Their patterns were differentiated from their male counterparts in a number of ways. One was that they tended to remain in the elected positions for a shorter period of time. Therefore, delimiting the length of terms of office may not have posed the same threat. Many male C.E.C. members, for example, remained as district representatives for a period in the region of fifteen years.

The increased female participation in the organisational structures was mainly a result of increasing demographic change in the membership, rather than as a result of organisational policy or a managed change process.

At Congress 1995, the Equality Committee decided to target other people from branches and districts to speak on related motions. This was one of the few occasions when the committee acted 'politically'. At the same event, the C.E.C. report stated that it was clear that there appeared to be attitudinal or traditional or structural barriers at branch and district level to the promotion of women candidates on national committees or of male members to the Equality Committee. The creation of a culture where it was both encouraged and accepted that men and women participate equally in the decision making processes of the organisation was stated as being of importance. This was in the context of a commitment to enact a strategy to change attitudes, and to establish related mechanisms at branch and district levels.

At Congress 1996, 439 women and 377 men spoke. This was the first time in the history of the I.N.T.O that more women than men spoke at Congress - despite having been in the majority of membership since the very early stages of the organisation. This resulted from an informal change in practice regulating speaking at the event. The time was divided evenly between all who wanted to speak, rather than a pre-specified time allocated to each speaker – previously having the effect of reducing the numbers of delegates who could do so.

A number of other developments occurred during this period including the establishment of an Education Committee at national level - representative of the various electoral districts.

The committee aided the development of policy and review of educational - rather than industrial relations - issues in the organisation. Trade union training for branch and district officers was also introduced.

One of the first rule changes that occurred enabled the branch and district structures of the organisation to organise in-service courses. This was a reversal of an earlier rule. It has been suggested that the earlier one had been adopted as the organisation was seen to be a trade union rather than a 'professional' body. It had been the case that if one of these structures had wanted to organise a seminar, it had been necessary for it to apply to the C.E.C. for permission. In addition to indicating the perceived mission of the organisation at the apex of the organisation, it also indicates a concern with maintaining control. The change in rule may be understood, then, as a practical example of how the new senior leadership had an alternative view of the mission of the organisation.

In 1989, the Equality Committee raised the issue of the need for reporting procedures to branch and districts. No mechanism had been created for this, despite members of the committee being elected from districts. It was decided that a written report should be made by Equality Committee representatives to district meetings with a request that it be circulated to branches. Members of the committee, it was felt, should attend branch meetings whenever possible. This meant when invited to do so by branches - as payment of expenses to undertake this had not been agreed by the C.E.C.

In 1991, the Equality Committee requested the C.E.C. to clarify the role of the Equality Committee Representative by rule. It also asked that Education Committee and Equality Committee representatives explain their role and responsibilities at branch meetings. The C.E.C. response was that as a result of financial constraints it would not be possible for the District Committees to invite Education Committee and Equality Committee representatives to visit branch meetings. It also stated that a rule change would be required to establish the Equality Committee representative as an ex-officio member of the District Committees.

Prior to the October branch meetings in 1991, a paper was circulated to branches and views of the branches were requested. The paper, entitled "Participation of women and men in the INTO: the C.E.C. Position," included proposals relating to the delimiting of terms of office for elected positions, the provision of reserved seats for women on the CEC, alteration of the role of the C.E.C. representative and discussion of the participation study.

The C.E.C. also made a number of decisions regarding the issue of participation not requiring rule changes including items related to information and communication initiatives, proposals for changes in branch communication methods and agenda. Early in 1992, the CEC proposed the rule changes be put to a Special Rules Congress in June 1992 as discussed earlier.

In November 1992, (following defeat of the reserved seats motion and others at the Special Rules Congress) the Equality Committee recommended to the C.E.C. that it should develop a policy to integrate equality into the main I.N.T.O. agenda. Among other measures, it proposed that statistics regarding gender patterns of participation should be gathered and monitored on an annual basis. The proposal was agreed by the C.E.C. and adopted at Congress 1994. Henceforth, all organisation functions were made responsible for the integration of equality into their area of activity. On the other hand, no one in particular was appointed to ensure this occurred in practical terms. The Equality Officer in the organisation, still an under-resourced area, was not accorded responsibility for this. The introduction of the new Mainstreaming Equality Policy was heavily influenced by a similar policy adopted by I.C.T.U. The Equality Officer was asked by the C.E.C. to draft proposals for rule changes to limit the terms of office of district representatives on the basis of a maximum eight-year tenure.

In 1993, the C.E.C. took a decision that Equality Committee representatives, who were not already members of District Committees, attend those meetings and that their expenses should be paid.

At Congress 1995, the CEC was mandated to review the role of the C.E.C. with a view to increasing its effectiveness - a report was made on this to Congress the following year. The report observed that rapidly changing economic and social change in society had been reflected in the education system, placing increasing demands on teachers. Change had also occurred, it stated, in the role played by the I.N.T.O. in directing and influencing change in the education field. This situation had caused all sorts of alterations in the organisation including the establishment of new committees, conferences and services. It had become increasingly involved in industrial relations activities - for example in relation to internal school disputes or those between teachers and management. This resulted in an increased amount of time away from home for all I.N.T.O. representatives, especially members of the C.E.C. and Head Office officials. It stated that this situation and the publication of the McCarthy (1991) report led to a realisation that an increased and increasing workload was not conducive to encouraging members to go forward for election to the C.E.C.

Recommendations were made in the report relating strongly to the policy of mainstreaming equality in terms of limiting terms of office for elected representatives, publications and the operation of branches / districts. The remainder related to the following:

- Issues that should appropriately be dealt with by district representatives / officials, aiming to ensure a balance between local and national issues, in relation to case work in particular;
- Staff problems;
- The procedure for termination of engagement from cases;
- The management of district organisations;
- It was seen to be important that the C.E.C. representative (district representatives) attend as many branch meetings as possible to ensure members were kept fully informed. Branches were urged to look at the organisation of their meetings in order to ensure the meetings continued to meet the needs of teachers;
- The potential role of branch officers enabling a reduction of pressure on the district representative (C.E.C. representative);

- It stated that the structure of very large branches might not be conducive to participation. A rationalisation of branches, it also said, could facilitate a decrease in time away from home for elected representatives to the C.E.C.;
- It looked at the operation of national level committees in the organisation. It proposed no amendment to this;
- It identified the revision and publication of the new I.N.T.O. Member's Handbook as a means of increasing the independence of members.

The report took as its frame of reference the existing workload and role of the C.E.C. member. It did not deal explicitly with issues that may arise in this respect in future, or work not currently being addressed at that level. It appeared to focus, in particular, on the importance of the C.E.C. representative as an imparter of information to members. It could be suggested, that the review did not actually suggest meaningful change, or a managed change strategy.

During this period, an 1850 number was introduced so that members could get direct access to Head Office for advice or information. Essentially, this increased the workload at Head Office and maintained the dependency culture that had developed in the organisation - even if it was now directed at Head Office officials rather than C.E.C. representatives. The Deputy General Secretary Designate / National Treasurer at the time suggested that the introduction of the 1850 number might have undermined the attempted changes suggested in the review of the role of the C.E.C.

Since the mid-1980s, there has been an increasing focus on the presentation of the organisation in the media. The Equality Officer of the time was also given the role of Press Officer. Subsequently, media co-ordinators in each district were appointed from among the membership. Annual training was, and continued to be, provided to this group. In the early 1990s, a full time Press Officer was appointed. An additional organisation magazine was published. The new General Secretary put a particular emphasis on this function.



Since the early 1990s, the Education Committee produced a number of reports on issues related to the professional development of teachers. This was influenced by the Deputy General Secretary / National Treasurer - he was the Education Officer prior to this. In March 1994, the C.E.C. considered a proposal that the I.N.T.O. should become involved in the delivery of in-service teacher training courses. Discussions took place with the Department of Education who agreed to provide financial support - given the availability of E.U. funding.

The C.E.C. made a number of decisions in relation to in-service training early that summer. These related to the arrangements made at district level for the delivery of services. The programme provided new participation opportunities for members. From this time onwards, the in-service training provision became a regular and fairly major consideration at C.E.C. meetings.

In 1994, the C.E.C. made a number of further decisions in relation to the in-service programme. These included:

- C.E.C. members contacted district trainers to establish closer links;
- An I.N.T.O. task force on in-service provision was established;
- A resource person was appointed in each branch area.

The C.E.C. subsequently decided that:

- Local in-service structures should be discussed;
- A letter should be sent to the Department of Education regarding the urgency of establishing a national framework for in-service training.

A paper was tabled at the C.E.C. including a proposal for local I.N.T.O. professional development / in-service structures, and the involvement of branches in the organisation and administration of courses. The C.E.C. approved this in principle. By early in 1995, however, difficulties were being experienced as a result of the non-allocation of a budget by the Department of Education. These were resolved by October 1995 - although with the reduction of E.U. funding, resourcing the programme continued to be a difficulty. This was

particularly the case in the context of the organisation having undertaken a major commitment in the area in terms of human resources and public perception.

Whilst all participants on in-service courses provided an evaluation of the courses, this did not extend to providing feedback to the organisation directly on pertinent issues that arose during the course of the discussions. No mechanism was developed to allow this.

The Assistant General Secretary observed that those who participated on the courses, and particularly those who had acted as facilitators, tended in the past not to be involved in the branch structure of the I.N.T.O. The programme, therefore, appeared to involve an up until now passive group of I.N.T.O. members - in terms of the traditional structures of the organisation. It was observed that, at least to some extent, the professional development / in-service unit of the I.N.T.O. operated as a parallel organisation within the I.N.T.O. It did not operate as a source of environmental feedback to the organisation at local or national level - formally at least. This is significant as the focus of the training related, in many instances, to areas where teachers were experiencing increased pressure due to changes in their environment.

During 1994, it was agreed that a new Member's Handbook would be published. The aim was that this would aid the greater independence of the membership. The handbook was distributed through a process of cascade training throughout the organisation - from the C.E.C. to staff representative level - by September 1995.

Following Congress 1995, the Trade Union Training Committee undertook to review its activities and report the findings to Congress 1996. This was the first major review of trade union training in the I.N.T.O. since the inception of the committee in the early 1980s. It was determined to be an appropriate course of action at this stage for a number of reasons. Two of these were:

- The publication of a new handbook offered opportunities to enhance the role of elected branch officers and staff representatives;

- There was a need to assess the impact of the I.N.T.O. Professional Development / In- service Training Programme on the overall training needs of members.

The brief of the committee was to

"evaluate the I.N.T.O.'s current Trade Union Training Policy and to determine what structures need to be put in place to ensure that the training programme will meet the evolving needs of members over the next five year period" (C.E.C. Report to Congress 1995-96:248).

The terms of reference of the committee included:

- To define the overall aims of the I.N.T.O. Trade Union Training Programme and target groups;
- To evaluate current provision in terms of the changing needs of the members;
- To review the ongoing evaluation of the I.N.T.O. training;
- To consider the possibility of acquiring accreditation;
- To review the training of tutors including those at branch and district levels;
- To consider the devolution of responsibility for organising and delivering of courses at local level with policy, research, evaluation, accreditation and back-up co-ordinated centrally;
- To review the financing of I.N.T.O. training;
- To review 'equal opportunities' and I.N.T.O. training;
- To consider the harmonisation of I.N.T.O. trade union training courses and I.N.T.O. professional development / in-service courses in conformity with priorities and strategies adopted by the I.C.T.U.

In 1996, the draft strategy was circulated to the C.E.C. It recommended that the overall aims of I.N.T.O. training should be:

- To increase the active participation of members of the organisation;
- To develop leadership potential within the organisation;
- To promote I.N.T.O. as an effective and caring organisation and to increase members sense of identification with the I.N.T.O.;

- To impart knowledge and skills to activists at branch, district and national level on I.N.T.O. structures and policies and on the policies of the broader trade union movement at European level;
- To increase self-reliance among members and to reduce the overall dependency of members on Head Office / C.E.C. representatives;
- To promote gender equity within the organisation, the profession and within the primary school;
- To ensure that an adequate share of the organisation's resources was devoted to trade union training in order to achieve the objectives outlined.

The review recommended that regular and systematic training be provided for

- Branch and district officers (in particular to meet the needs of secretaries and chairpersons);
- Staff representatives.

The review stated that training opportunities should continue to be provided for C.E.C. / officials, members of national committees, principal teachers, media co-ordinators, teachers approaching retirement, in-service co-ordinators, tutors on INTO training courses (at national and district levels), district secretaries who act as trade union co-ordinators at district level.

The prioritisation of branch and district officers was justified on the basis that they held key leadership roles in the organisation at local level - chairpersons and secretaries were highlighted in this respect as playing a vital role. Survey data gathered by the committee indicated that 36% of branch secretaries had never attended a training course. While 64% had at some stage attended branch officer courses, only 46% had done so within the last five years. An average of eighteen new branch secretaries were appointed each year out of a total of 151 (INTO Trade Union Training Review and Strategy 1996). This survey also revealed that the majority (61%) of chairpersons had their term limited by by-law, the majority being governed by a two-year term. Over half of the branch chairpersons had never attended a training course.

Tailored training courses were therefore proposed for both these groups, to be organised at a regional level. In general terms, the courses would include both policy and skill development elements. The course for branch secretaries would include, in particular, the function and role and responsibilities of branch officers in a changing organisation.

The review also highlighted the large number of staff representatives that existed at local level - 3,200. It recognised that the provision of training to this group posed an enormous challenge to the organisation. The importance of this role was identified in the McCarthy (1991) report - this role was seen to be one of the main points of identification and contact for members with the I.N.T.O. It was proposed that annual training should be provided to at least thirty staff representatives in each district annually. It recommended that this should be provided by trainers in the district. The training would be provided through the branch network, co-ordinated by the District Secretary.

In relation to the provision of training for the C.E.C. and officials, the review stated that annual seminars would be held for the purposes of providing an opportunity to examine in depth some strategic issues (internal and external) facing the organisation, and to provide participants with the skills and knowledge to address issues arising from these new challenges. A similar half-day seminar was proposed for the other national committees.

The review also proposed that the District Secretary act as the co-ordinator of training initiatives within the district and that annual training should be given to District Secretaries to enable them to undertake this role. It also stated that a systematic approach should be adopted for the evaluation of each course. This would be allied to a statement of clear objectives for each course. A summary of evaluations was recommended for publication in the C.E.C. Annual Report to Congress each year. This referred to the operation of the training course rather than feedback on specific issues of concern to participants or pertinent experiences that might arise during discussion at the courses.

Finally, the review referred to the co-ordination of the I.N.T.O. Trade Union Training and Professional Development Programmes. The committee noted that the objectives of both were similar and therefore it was important that they develop in a complimentary fashion (INTO Trade Union Training Review and Strategy 1996). The strategy was adopted at Congress 1996.

It can be suggested that the trade union training strategy sought to:

- Create a cadre of effective and informed I.N.T.O. officers particularly at lower levels of the organisation;
- Engage the trade union structure and personnel in 'professional development' provision;
- Create more opportunities at lower levels for contact with the organisation outside of the formalities of branch and district levels;
- Create a cohesive and coherent internal 'development' function within the I.N.T.O.;
- Create a vastly increased number of training opportunities, aimed at greater numbers, where gender issues would be included.

The strategy attempted to address some of the issues raised in the McCarthy (1991) study - particularly in relation to providing a greater range of opportunities for members to engage with the organisation and to broaden the perception of the role and mission of the I.N.T.O. It also aimed, through these processes, to help to reduce resistance to change among the core activists of the I.N.T.O.

The approach to feedback to the organisation on changes and needs of its membership, however, was still heavily reliant on the traditional trade union structure. District representatives' communication in the C.E.C. Review still appears to have had an emphasis on one way, top down communication. Feedback mechanisms were not formally built into the I.N.T.O. training strategy except in terms of the evaluation of the operation of courses. The issue of feedback to the organisation was not highlighted as one requiring attention.

**Output: Participation patterns in the organisational strategy Cycle and their relationship to the development of organisational learning capacity in the Irish National Teachers' Organisation**

During the early years of the twentieth century, the rules were changed to allow very limited representation of assistant male teachers and, later, female teachers, on the Central Executive Committee of the organisation. Subsequently, on the basis of the stated organisational policy of equality of all members, all elected positions were opened to all members regardless of gender or teaching status. This did not increase the levels of participation of under or non-participating groups, but rather resulted in the maintenance of the pattern of under participation, of women teachers in particular.

Until the late 1960s and, indeed, beyond, the cultural perspective of the most established group in the organisation dominated the understanding of this under-participation - in terms of the assumptions made and the factors impacting on under or non-participation. This influenced organisational decisions made in terms of rule changes - their impact not being recognised.

In the absence of an obvious and immediate threat to the organisation by this non-participation, there was little motivation or cause to recognise the issue as organisationally strategic. Non-participation was, therefore, defined as a matter of individual choice rather than something caused by the manner in which the organisation carried out its business. The dominant cultural norms of participation were exclusive and alien to the non-participating groups, particularly women. An alternative culture of passive participation developed among these groups. This was also highly dependent on the paternalism of the dominant group.

When internal change related to participation of members was attempted in the period 1970-1987, there were a number of factors that appeared to impact upon it. These included the following.

The senior leadership in the organisation appeared to experience a sense of 'threat' posed by the introduction of an alternative perspective at national level, or an alternative leadership group emerging at national level with an alternative perspective. In this reaction, there was an apparent lack of consciousness of the contradiction in behaviour and approach between actions undertaken relating to external events and those occurring internally. In some ways, this may relate to the idea of a conflict between the 'espoused theory' and 'theory in use' among the leadership. This seems to have resulted in the senior leadership taking non-strategic, narrow, political action to defend its power and influence.

This reaction at national level was reflected among activists at district and branch levels through their passive resistance preventing consideration and engagement with issues of gender equality - acting as gatekeepers and boundary spanners.

In the late 1980s, on the instigation of the Equality Committee a major study was undertaken of gender patterns of participation among the membership of the I.N.T.O. This resulted in a number of subsequent reviews, recommendations and national ballots related to rule and structural changes. In general, these achieved little change. In terms of ballots, the proposals were defeated. The reason for this failure appears to have related to the following factors.

No concerted effort was undertaken by the senior leadership to prepare the activists in the organisation for change, or to strategically manage a change process. The adoption of a trade union training strategy at the end of the period may have indicated the start of such an approach.

There was no person charged with the overall management of change strategies within the organisation. Those that might have undertaken the task in the Equality Committee, or in trade union training, were prevented from doing so as a result of the high degree of control the C.E.C. had of activities, and from the highly regimented structures and rules of procedure in the organisation. This meant that by 1996, five years after the publication of the McCarthy (1991) report, little strategic change had occurred. The In-service and Trade



Union Training Strategy (to be implemented and managed by the unit established for the purpose) held the possibility of enabling this but was as yet unproven in terms of its impact on the activists in the organisation.

Where new sources of environmental feedback were developing within the organisation, these remained un-integrated with the main representative structures. There appeared to be little attempt to harness these in a manner that would create common understandings, knowledge, future vision and strategy. This appeared to remain an unacknowledged need within the organisation.

The interpretation of the McCarthy (1991) report as a matter of gender participation only by the senior leadership may have impacted on the felt need to engage energetically in a change strategy. The report clearly stated that gender was not the main issue in terms of non-participation in the organisation - in effect it was a coincidental issue. This, however, appears not to have been heard by the leadership or activists in the organisation. In saying this, however, it was only as a result of the action of the Equality Committee that this feedback to the organisation was provided. This provided the framework within which the report may have been perceived by the senior leadership and activist group.

This dysfunction suggests that there was a high degree of insulation among activists / leadership resulting from the strong culture that existed and the lack of diversity feeding into the formal and strategic processes / structures of the organisation. Where greater consciousness existed at senior leadership levels of likely future scenarios, only the training strategy adopted at the end of the period appeared to be concerned with the on-going need to create readiness for change among the membership / activists. This suggests the existence of significant learning dysfunction within the I.N.T.O. resulting from the organisational culture that had developed and become embedded in the operation of the organisation.

**Input output Analytical Model (Part Three):**

**The relationship between the strategic change capability, the organisational learning capacity and patterns of membership participation in the Irish National Teacher's Organisation**

**Input: Profile of the membership**

The CEC Report for 2000/2001 (INTO 2001) records the gender breakdown of membership and those in elected positions within the organisation. The total number of members was 21,951. The breakdown was as follows. In 2000/2001, women comprised 80% and men 20% of the membership. Women made-up 72% of the staff representatives and men 28%. Women were 56% of the delegates to Congress, men were 46%. Of the media co-ordinators, women were 54.75% and men 45.25%. At national level, women were 37.5% of the C.E.C., 43.75% of the Education Committee, 100% of the Equality Committee, 25% of the Standing Orders Committee and 31% of the Accounts Committee. In terms of elected positions at branch level, the gender breakdown was as follows:

- Cathaoirleach: women held 57% and men 43% of the positions;
- Leas Cathaoirleach: women held 62% and men 38% of the positions;
- Timire: women held 74% and men 26% of the positions;
- Runaí: women held 46% and men 54% of the positions;
- Branch Committee members: women held 58% and men 42% of the positions;
- Delegates to District Committee: women held 58% and men 42% of the positions  
(I.N.T.O. C.E.C. Report to Congress 2000/2001)

It can be seen that in 2000/01 out of a total of 21,951 only 2103 acted in elected / representative roles within the organisation - less than 10%. It can also be seen that it was only at the national level of the representative structures, that women remained in a

minority. At national level, the traditional profile of leadership still dominated. Similarly, the electoral structures still did not reflect the demographics of the membership of the organisation.

Change that had occurred was a result of the changing demographics of membership of the organisation bringing about unplanned change - that is to say it was not a process of organisationally driven strategic change.

The norm of length of participation of male members on committees at national level was in the region of fifteen years. Towards the end of this period a number of vacancies occurred on the C.E.C in particular. For the first time, it became difficult to get sufficient nominations to fill them.

It can also be seen that the overall percentage of members involved through the formal democratic roles was low - if the role of staff representatives is excluded, it was even lower. The position of staff representative remained un-integrated with the rest of the organisation. The McCarthy (1991) report indicated that non-involvement rather than gender was the salient factor determining the level of ownership the membership experienced of the organisation. Therefore, the quality of engagement by the members with the organisation appeared to be dependent on their experiences with the organisation at branch and school levels. This implied that the role played by elected representatives at those levels was clearly important in terms of engaging in two-way communication, reflection and boundary spanning.

By 1998/99, the I.N.T.O. began to experience a major decline in participation of the membership in national ballots of the organisation and branch meeting attendance. Increasingly, the leadership experienced difficulties in convincing the membership to vote for the position it was advocating. The organisation balloted, for example, on the early retirement clauses of the "Partnership for Competitiveness and Work" Social Partnership agreement. 39% of the membership balloted. In some branches, where the highest number of people voted, 75% voted. However, in others, where the lowest numbers voting were

recorded, only 10% did so. Subsequently, at the branch annual general meetings in January 1999, the membership was balloted in relation to conciliation and arbitration issues. The overall ballot dropped to 21% - the branches with the highest turnout being 70%, but those with the lowest being 8%.

### **Change arrangements**

The agenda for the national committees came about in two ways, it was reported by a senior official. The CEC asked for an issue to be looked at, or, the committee identified an issue to be looked at. It then proposed it to the C.E.C. This process was clearly dependent on the members of the committees, including the C.E.C., having effective sources of environmental feedback to ensure the issues proposed were pertinent and taken-up in a timely fashion. Their usefulness was similarly dependent on the ability of the committees to communicate and engage with the broader organisation.

The senior official who provided support to the work of two of the national policy development (Equality and Education) committees felt change was needed in the way the committees operated. This was because, she felt, they became locked into work agendas and therefore did not have the capacity to discuss current issues due to resource considerations of time, human resources and finance. The practice currently was, in relation to policy development by these committees, to produce finalised documents for presentation to the membership. This was the expectation of the committee resulting from practice historically. She felt that it was not necessary to have a finalised policy document for a members' conference. The conference could have been used to tease out issues, to utilise and engage the broader expertise of the membership through an alternative approach. This issue was echoed in Jordon's (1997) study where she reported resistance on the part of committee members to change the way they undertook their business.

The senior official who provided support to the work of the two committees believed that the forthcoming election of a new Education Committee at Congress 2000 might provide an opportunity to promote change. The 'new' committee, it was anticipated, would have a new chairperson and five new members - still a minority of the group. The official expressed a

desire to have more workshop style, small group meetings rather than large committee meetings. This implied a reallocation in the use of the budget in comparison to previous eras. She identified the need / opportunity to use committee meetings to look at current issues in a more in-depth manner than the C.E.C. had time to undertake. She identified what she believed would be the difficulties in achieving an alternative way of working at national committee level. These included:

- The workload and variety of commitments of all involved, including officials;
- The hierarchical approach that existed within the organisation that had the effect of inhibiting required action.

As indicated in earlier phases of the organisation's development, difficulties in getting particular policy issues discussed at branch meetings were also experienced by national level committees. This reflected the role of branch and district chairpersons in controlling agendas and structuring meetings. These were highly regulated by rule of the organisation. Dangers of overburdening members with demands for participation in discussion on various issues were also envisaged by some officials - particularly in the context of the ever-expanding external educational agenda.

The situation also indicated the need for increased clarity around the role of full time officials. This was apparent in two respects. Firstly, it was reported that often there was an unintentional overlap in work areas. This occurred, for example, with correspondence being sent to the General Secretary who delegated it to another official - without realising that yet another official was already working on the same matter. Some improvement had occurred in recent times in this respect, with the division of roles between staff according to matters requiring an industrial relations approach as opposed to an administrative or developmental one. Fundamentally, however, the issue appeared to relate to internal communications and information exchange.

Secondly, the work of national committees was often undertaken and finalised by full time officials. Due to externally imposed deadlines, it is not always possible for committees to see final drafts of reports before publication, or for the C.E.C. to approve policy statements

as was required by rule of the organisation. Yet, the expectation was that the membership of these committees should be engaged in this work. Therefore, the roles of officials and elected members of national committees appeared to be somewhat confused and in need of clarification. Did the situation indicate the even further reduction of the role of elected representatives in the organisation as sources of environmental feedback and reflection at the apex of the organisation?

The difficulties experienced by officials were also indicated in regard to the operation of staff meetings. There tended not to be a formal agenda. Any member of staff could raise an issue but the meetings tended to be dominated by the concerns of the General Secretary on the day. To some members of staff, sometimes these meetings appeared to be wasteful of human resources. However, given the large workloads and commitments of all involved it was necessary to agree the timings of the meetings sufficiently in advance in order to enable officials to meet together at all. This raises the issue of the strategic context of the meetings and their use as strategic development opportunities within the organisation. It also relates to the levels of integration that occurred between the various aspects of the organisations work - and perhaps, the level of human resources engaged in the maintenance of historic structures and ways of working. Jordon(1997) found that committee members described strategy in terms of the organisation's structure. They also described it in terms of external relationships, for example with management bodies and the Department of Education. This may have indicated a preoccupation with current realities rather than a focus on the future.

New structures that had been established within the organisation, for example the Principal's Forum, had no formal relationship with the national committee system. The branch structure was envisaged as the integrating mechanism for all the new initiatives and interest groups. This, however, depended on individual members reporting to these structures and opportunity being provided for the interaction at that level.

At the Joint Seminar of the C.E.C. and other national committees held in 1997, it was stated that there was too much emphasis on the external image of the I.N.T.O. on the part of the

leadership. It was also said that there was a 'gap' between teachers' issues and 'official' thinking in the organisation.

This experience was reflected in 1999 in the decision making process in the organisation regarding the extension of membership to childcare assistants in classrooms. A number of issues were evident in this. There was a strong relationship and influence gap between the leadership at the apex of the organisation, the membership who attended branch meetings and activists who were engaged in branch activity. There appeared to be a lack of trust and resentment on the part of the activists at branch level. This was evident from the nature of the adversarial communication and debate that took place.

The operation of, and methodology applied at, branch meetings and congresses inhibited reflection, constructive debate and information sharing and encouraged adversarial behaviour. The impact of the traditional agenda used at branch meetings - determined by both tradition and the rules in operation in the organisation, and their impact on the formal working methods utilised at these meetings - facilitated this result. The number of members attending the meetings was low in terms of the total membership of the branches.

The motion to admit the new category of membership was lost despite the fact that their non-admittance posed a major threat to the influence of the organisation - as another trade union was attempting to recruit the childcare assistants. The defeat ensured the way was clear for a second trade union to become involved in the domain of the primary school teacher. No longer being the only representative voice clearly had the potential to reduce the power, influence and control of the I.N.T.O. The perceptions of the membership and activists in particular appeared not to be strategic in orientation - they appeared not to have a clear future focus. This reflected the manner in which the change project was approached and managed - particularly in relation to the preparation of the general membership in relation to the necessity for change. This in turn related to the nature of the relationship between the leadership and the membership - and in particular the most active members of the organisation that had historically been supporters of the national leadership

### **Communication, conflict / difference management, participation styles and roles**

The survey carried out for the purposes of this study of members of the three main national representative committees (the CEC, Education Committee and Equality Committee) found the following.

The majority of the members of the national committee members communicated with the members of the C.E.C., other national committees, the Head Office staff, the General Secretary, district and branch committees and members at local level. This entailed two - way communication with members of the C.E.C., Head office staff, branch committees and members at local level. Only half of the respondents had two-way communication with members of district committees. Less than half had two-way communication with the General Secretary. 72% of the respondents communicated with members of the C.E.C. on a monthly basis or more frequently. 38% communicated with Head Office staff on a monthly basis or more frequently. 28% did so with the General Secretary on a monthly basis or more frequently. 25% communicated with members of the other national committees on a monthly basis - the remainder doing so less frequently. 15% communicated with district committees on a monthly basis - the remainder doing so less frequently. 29% communicated with branches on a monthly basis, the remainder communicating less often. 46% communicated with members at a local level on a monthly basis or more frequently.

In all instances, members of these national committees communicated with all others both in response to need and as a formal organisational requirement. It occurred most often in response to need in relation to communication with C.E.C. members, Head Office Staff, the General Secretary and members at local level. It occurred most often in relation to formal organisation requirements in communication with members of other national committees, district committees and branch committees.

The focus of the communication with members of the C.E.C., Head Office staff, members of other national committees, district committees, branch committees and members at local level was most often related to current realities experienced by the organisation and / or



individuals. Only in the case of communication with the General Secretary was the communication equally likely to focus on the future / vision of the organisation and / or individuals.

The communication involved both policy-making / strategic planning and short term / reactive discussion and decision making in almost equal measure when engaged with members of the C.E.C. In all other instances it involved short term / reactive discussion and decision making most of the time. It was reported that a systems perspective was adopted in communication with members of the C.E.C. and the General Secretary. In all other cases, the communication mainly had a narrow / single issue perspective.

Information gathering was a purpose of communication as follows: with C.E.C. members (73%), Head Office staff (62%), the General Secretary (44%), members of other national committees (48%), district committees (46%), branch committees (46%), and members at local level (56%).

Information imparting was a purpose of communication as follows: with C.E.C. members (58%), the Head Office staff (44%), General Secretary (27%), members of other national committees (54%), district committees (54%), branch committees (60%), and members on the ground (52%).

Reflection and analysis was a purpose of communication in relation to the following: with members of the C.E.C. (50%), Head Office staff (42%), the General Secretary (37%), members of other national committees (39%), district committees (42%), branch committees (35%) and members at local level (21%).

Decision making was a purpose of communication as follows: with the members of the C.E.C. (46%), Head Office staff (37%), the General Secretary (37%), members of other national committees (33%), district committees (42%), branch committees (42%) and members at local level (25%).

Decision imparting was a purpose of communication as follows: with members of the C.E.C. (27%), Head Office staff (10%), the General Secretary (17%), members of other national committees (29%), district committees (39%), branch committees (35%), and members at local level (42%).

Whilst various patterns are evident, it appears clear that a systemic process of strategic communication and learning did not take place between the members of the I.N.T.O. at national, district, branch and local levels.

When the respondents were asked about the values that were given practical effect at various levels of the organisation, and whether this occurred as a result of a formal policy / programme or informally, they responded as follows.

Was a sense of belonging created? The response was that this occurred according to 62% at branch level, 44% at district level and 42% at national level. This resulted from informal action (58%).

Was a sense of collective security and individual significance established? This occurred according to 52% at branch level, 37% at district level and 48% at national level. There was no consensus as to why it occurred.

Was solidarity asserted and diversity valued? This occurred according to 39% at branch level, 35% at district level and 54% at national level. There was no consensus as to why this occurred.

Were cultural differences accepted and similarities the focus? This occurred according to 31% at branch level, 29% at district level and 44% at national level. There was no consensus as to why this occurred.

Was an inclusive culture developed, through its overt negotiation and definition? This occurred according to 33% at branch level, 23% at district level and 46% at national level. There was no consensus why this occurred.

Was a comfortable milieu for all to participate created? This occurred according to 37% at branch level, 27% at district level and 39% at national level. There was no consensus regarding why this occurred.

Was there a clear recognition of difference and tolerance of differences? This occurred according to 31% at branch level, 29% at district level and 39% at national level. There was no consensus regarding why this occurred.

Was shared commitment through dialogue and empathy developed? This occurred according to 46% at branch level, 35% at district level and 44% at national level. There was no consensus regarding why this occurred.

This response appears to indicate that there was no conscious attempt to establish a culture which was inclusive of difference or that would enable the organisation to manage differences within it to its advantage in terms of organisational learning or strategic development within the INTO. It may also help to put into perspective the reducing levels of participation within the organisation and the increasing levels of destructive conflict among activists within it.

The approach to dealing with conflict at various levels of the organisation was described as follows. At branch level, 27% felt that it was treated as constructive contention enabling development and 39% felt the approach was non-adversarial problem solving in a context of mutual understanding / values and recognition of differences. 21% felt it was approached as a threat to security, power, resources and influence. 31% felt it was adversarial with a win/lose focus.

At district level, 17% felt that it was treated as constructive contention enabling development and 35% felt the approach was non-adversarial problem solving in a context of mutual understanding / values and recognition of differences. 19% felt it was approached as a threat to security, power, resources and influence. 15% felt it was adversarial with a win/lose focus.

At national level, 52% felt that it was treated as constructive contention enabling development and 42% felt the approach was non-adversarial problem solving in a context of mutual understanding / values and recognition of differences. 17% felt it was approached as a threat to security, power, resources and influence. 32% felt it was adversarial with a win/lose focus.

This suggests that there was quite a divergence in the experience and perspectives of national committee members of conflict / difference management at the various levels of the organisation.

The respondents were asked what roles leadership encompassed at the various levels of the organisation in their experience. At branch level, the greatest degree of consensus (62%) agreed that leadership enabled debate and discussion. 52% felt that it actively enabled others to participate in debate/ discussion. At district level, 52% felt that leadership enabled debate and discussion. 44% felt that it actively enabled others to participate in debate/ discussion. At national level, 56% felt that leadership enabled debate and discussion. 46% felt that it actively enabled others to participate in debate/ discussion. 44% felt that leadership encouraged closure of a difficulty within a given time frame.

The greatest level of consensus around the roles played by leadership at branch level related to leadership as being 'the authority and source of knowledge' (54%), 'enabler / facilitator' (48%), 'describer of current realities' (42%). At district level, 50% identified the role of leader as 'the authority and source of knowledge'. Little consensus around any other definition of the role emerged. At national level, 58% identified the role of leader as 'the authority and source of knowledge'. 56% identified the role as including 'describer of

current realities' and 'vision stator'. 52% identified 'reflector and analyser' as a role. 50% identified the role as 'enabler / facilitator'. 49% identified the role as involving being a 'mediator / negotiator between different groups / perspectives in the organisation'. 48% stated it included 'enabler / facilitator'. 44% described it as including being a 'designer of learning processes so that people in the organisation can deal productively with critical issues and learn effectively from the experiences'.

The majority of the respondents felt the role of representative in the INTO impacted on the rest of the life of the individuals involved. There was no majority consensus regarding whether the organisation responded to this situation. Similarly, there was no consensus among the respondents regarding whether this situation impacted on the equal opportunities of I.N.T.O. members undertaking representative roles.

Jordon (1997) found that the members of the national committees saw their own role as:

- Raising pertinent issues,
- Contributing views
- Questioning practices
- Being involved in the work of the committees
- Listening to the people they represented
- Bringing the views of the people they represented to the committees and vice versa.

There appeared to be little direct connection between Congress and the national committees - except for the formal C.E.C. report that included those from the Education and Equality Committees. The C.E.C., as the organisation's central decision-making body, was not felt to utilise the resources of the other national committees on a consistent basis. The expansion of work of members of national committees was seen as 'duplication of work' (to the work of C.E.C. representatives) by the most senior officials in the organisation. This was not supported as an approach. At national level, communication was generally channelled through the officials and through the General Secretary or his deputy attending national committee meetings - when they attended.

Members of national committee felt that the C.E.C. was supportive of their work but that communication links were inadequate as there was no direct communication with C.E.C. and other organisation groups. Jordon (1997) found that this was a source of difficulty and frustration for committee members. The indirectness was felt to have a filtering effect on the urgency of messages or requests from committees. The supporting official was the formal channel of communication.

The members of national committees saw the role of the official supporting their work was to:

- Co-ordinate the work of the committees between meetings;
- Liase with external organisations and committees;
- Link the committees, Head Office and the C.E.C.;
- Inform the committees on developments at national level within the organisation;
- Provide administrative support to the committees.

Some close interaction existed between the national committee district representatives and C.E.C. representatives at district level. This largely depended on the district in question and on the personal relationship network involved. It was, therefore, an uneven experience throughout the organisation. This kind of engagement between representatives at national level in a district tended to occur more in Dublin. The Teachers Club, in particular, provided an informal contact point. In rural areas, this was more difficult to achieve. In general, therefore, there was little sense of 'district team' among these representatives.

Districts chairpersons and secretaries were only required to meet twice annually. Therefore, the development of relationships and cohesive groups was difficult to achieve. No organisational resources were deployed to achieve this - although, over time, the training strategy may have an impact. Again, it was easier for district committees or officers to meet and co-operate if based in Dublin.

The members of national committees experienced frustrations regarding the limitation of their roles at district levels, and their lack of involvement with branches. They also felt it

took a long time to receive a response to complaints. It was felt there were too many formalities in the operation of the organisation and committees and that these inhibited effective discussion. It was felt that the main focus of meetings appeared to be to get through the agenda. There were also difficulties in getting committee members to adhere to deadlines. There was a feeling among national committee members that they were operating in a vacuum. They experienced a sense of isolation between meetings.

Often the influence of members of special groups was highly diluted within the traditional structures of the organisation. It was often difficult for them to get their concerns included on the agenda at branch meetings - and by extension on those of national committees. The national leadership could intervene to have an issue considered if enough members requested this. This, however, was often dependent on the informal relationships that existed between senior officials / leadership and those particular members of interest groups.

It was reported by some officials that the membership appeared not always to be aware of work going on in the organisation, or make the connections between policies and decisions made by the organisation at Congress and the implications of these for the campaigns undertaken by the organisation. It was felt that members were circulated with information but it may not be read or heeded - perhaps reflected on? There also appeared to be issues of receiving communication / feedback from the members through the structures of the organisation.

It was suggested that the investment in communications made by the organisation had led to a decrease in attendance at branch meetings. This was felt to be because the membership received publications and have easy access to the C.E.C. and I.N.T.O. Head Office. It confirmed the McCarthy (1991) finding that the main reasons members attended branch meetings was to get information rather than to contribute to the meetings. This was echoed in the branch discussions on participation reported on by the members of the Equality Committee in 2001.

It was questioned whether there should be other ways of communicating other than attendance at branch meetings. It was felt that services and benefits to members were a good way of retaining membership levels and these are demanded by the membership. It was also said that the In-service provision strengthened bonds with the membership, especially when teachers provided the training. The use of Internet technology was an issue to be further developed or at least further considered. There was a sense that there was a need to create direct access to each member. At the same time, this was seen to, perhaps, individualise the interactions of the member and the organisation - impacting on the sense of commonality and joint development of understandings within the organisation. The most senior officials in the organisation did not highlight this latter consideration. Their main concern was the need for more direct engagement with each member.

Another observation was that members appeared to expect instant attention and response from Head Office to their enquiries. They still perceived the organisation as doing everything for them. This was consistent with the established organisational culture.

Byrne's study (1998) into management roles in the I.N.T.O. gave some useful insights into the exercise of leadership at senior levels of the organisation. In the course of the research, she interviewed both of the senior, elected officials (the General Secretary and the National Treasurer / Deputy General Secretary) in relation to their views of the role of the C.E.C. member. It transpired that, in their view, the role was two fold:

- To bring the members' perspective to discussion and decision making at C.E.C. meetings;
- To organise the members in the district from which they had been elected.

They felt that the responsibility for the management and leadership of the organisation was delegated by the C.E.C. to the General Secretary, and through him to other officials. The C.E.C., however, had the ultimate authority under the I.N.T.O. rules and elected officials were responsible to the C.E.C. The National Treasurer suggested that the C.E.C. was comparable to a Board of Directors that was concerned with directing the business of the organisation at a macro level. On a daily basis, the paid employees (the officials)



implemented decisions and directives. It was stated that the rules of the I.N.T.O. were seen to provide a framework for the role of the C.E.C. members and officials. The rules provided a form of protection for the organisation if the officials were not acting appropriately.

The elected officials believed that the executive member should adopt a leadership role in the districts. It was felt that s/he should bring to the C.E.C. meetings, not just a 'shopping list' of what members wanted but, also, an analysis and judgement on both district and national issues. It was further stated that the role of the C.E.C. should be to

"leaven, qualify, modify, change or reject the ideas and proposals generated and presented by the officials" (Byrne 1998: 88).

The General Secretary believed that the generation of ideas, planning and goal setting should be primarily initiated and driven by officials. Whilst the General Treasurer agreed with this, he also felt that the C.E.C. members had a role in being innovative and contributing to the generation and formulation of new ideas and organisation policies.

Both elected officials felt that, in the interests of the effective operation of the organisation, and the protection of the democratic process of the organisation, it was crucial that the C.E.C. was fully informed of all organisational developments and that their judgement on issues was fully taken into account. They stressed that the C.E.C. had the authority to modify or reject the officials' proposals. It was also acknowledged that the ability of the C.E.C. members to offer leadership at the district level was dependent on their individual ownership of the decisions and strategies they were promoting on behalf of the organisation.

The National Treasurer expressed a fear that the C.E.C. was becoming over dependent on officials for information and direction. He felt they were not bringing a critical analysis to the organisation's decision-making process. He felt this was a result of the increasing complexity of the education environment. He believed this forced the C.E.C. members to concentrate on collecting and assimilating information for the purpose of reporting back to meetings and members in their district areas. He continued by expressing the view that this

was resulting in a diminished ability to provide a critical analysis, and to be proactive, in the decision making process.

During the interviews for this study, the elected officials stated that strong officials and a weak C.E.C. would result in a poor dynamic reducing the vitality of the I.N.T.O. This would risk the loss of contact with the membership and increase the level of bureaucracy of the organisation. They therefore felt it was important to maintain a balance between both groups. This was seen to be the need for balance with the proactive role of the officials. This was in leading and driving the organisation, and the reactive role of the C.E.C. in response to this - supporting, modifying or rejecting officials' proposals as they rejected the members' views and brought their judgement to bear on discussion and decision making.

The General Secretary was of the opinion that the C.E.C. members should not have an involvement in casework or membership queries. He believed that that procedure was not envisaged when the rules of the organisation were established. He stated that he felt such procedures were an inefficient and ineffective use of the I.N.T.O. human resources. He stated that this work should be carried out by officials and perhaps, branch officers. If this were the case, it would enable C.E.C. members to devote more time to the organisation and development of districts, and to national policy development and implementation. This would reduce the demands on the time of the C.E.C. member and reduce the potential for conflict between their different roles - domestic, professional and I.N.T.O. One C.E.C. member, for example, disagreed with this perspective. He believed that casework enabled the development of personal relationships with the CEC representatives within districts that in turn produced support from members when required (C.E.C. Representative XII: Interview 2000).

When discussing the training and development requirements of C.E.C. members, the General Secretary identified a number of areas as follows (Byrne 1998):

- The ability and skill to be forward looking, assess change proposals rapidly and face new challenges;

- The need for openness to new proposals and the ability to critically assess them - vital if the organisation is to grow in status and increase its influence within the education field and in Irish society generally;
- The ability to lead the membership in districts through rapid and complex change in the teaching profession and in the organisation.

The National Treasurer identified a number of related skill areas (Byrne 1998):

- The ability to take on a brief quickly;
- The ability to critically assess information;
- The need for a good basic knowledge of the organisation's core issues.

When asked was there a need for the organisation to change its structures, the senior officials both stated that there was a need to examine and change to ensure structures reflected the real needs of the membership, and not just those of core activists. They believed there would be strong resistance among the latter group to any change proposed, particularly regarding the role of the C.E.C. member.

The General Secretary observed that parallel structures had been developed where members, who were not active within the formal structures of the I.N.T.O., could participate in other ways. He gave examples such as the Professional Development Programme, the Principals Forum, new information and communication technology, conferences and seminars. In the instance of the increasing use of communication technology, he felt there was resistance to this development among core activists. He believed, however, that increasingly the organisation would have to find ways to accommodate the increasing variety and complexity of the membership.

Both officials believed that as the range of the activities in which the I.N.T.O. was involved increased, the role of the C.E.C. member would become even more demanding.

"Whilst the demands could be eased to some extent by the involvement of the branch officers in query and case work, through the development of team work and delegation within each district, the General Secretary considered that the Executive member would be reluctant to relinquish the sense of power and influence in the organisation which is based on the well established norms and practices of the Executive members" (Byrne 1998:91).

Byrne (1998) concluded that the duality of role within the union's leadership structure was loaded with potential conflict. She continued by observing that C.E.C. members perceived that they were not fully engaged in leading and managing the affairs of the organisation as they are directed to do by the rules of the I.N.T.O.:

"to manage, superintend and direct the affairs of the organisation...to direct the action of the paid officials"(Byrne 1998:95). Her research findings identified that C.E.C. members suffered a degree of frustration with the C.E.C. meetings caused by "the lack of time to read documentation, rubber stamping decisions, the lack of opportunity to tease out the issues and all items beset with a sense of urgency due to the speed at which the meeting progresses"(Byrne 1998:95).

This was borne out by the observations of this researcher during the course of this study.

This experience was compounded by the lack of time to prepare for the meetings due to the competing demands of school and I.N.T.O. work. Byrne also found that there was a sense of a lack of knowledge and expertise related to issues raised and discussed and decisions taken which contributed to the frustration of the C.E.C. members.

Byrne observed that the position of the officials was strengthened by their control of C.E.C. documentation and also by their expertise in the issues under discussion.

"It could ...be argued that...the officials...are providing both the community of purpose and the organisation, which may be undermining the democratic process in the organisation. It appears that the role the Executive is undertaking in respect to leadership of the organisation is consultative rather than full participative" (Byrne 1998:95).

She continued that her research findings identified the underlying tensions related to role expectations and where power lay in the relationship between the C.E.C. and the officials. She stated that there was a full awareness on the part of C.E.C. members that the power of the officials was increasing with the growing variety and complexity of the organisation and the wide range of issues the C.E.C. deals with. The increase in the number of officials employed by the organisation in the last five years had coincided with a decrease in the length of time that C.E.C. members stay in office. Byrne stated that concern was expressed by C.E.C. members that the combination of this increase in the number of officials together with the reduction in the terms of office of C.E.C. members might lead to the organisation losing touch with its members in the districts. This would result in the balance of power shifting further to the officials.

Byrne suggested that the management of the content and context of meetings, together with the control and conduct of meetings, effectively contributed to the stifling of the C.E.C. function.

“The General Secretary’s role and style of leadership in meetings, and within the organisation at national level, could be seen as playing a part in the restrictive nature of the Executive Committee’s contribution to strategy direction and policy making. Yet...this arises from the ambiguity of the rules regarding his duties” (Byrne 1998:104).

She continued by saying that role ambiguity, lack of clarity and lack of shared vision concerning the power relationships between the C.E.C. and the elected officials in the I.N.T.O. were among her main research findings.

In relation to change, the General Secretary stated in interview that it was necessary to ignore what was in place in the organisation as to try and change that always met with resistance. He felt the existing structure was useful for the purposes of elections but it did not aid the ability of the organisation to hear what the members and others were saying. Neither did he feel existing organisational processes were helpful in this. He felt a parallel structure of interest groups was necessary. However, these would not be decision-making groups. He felt that those that existed were the main locations of reflection within the organisation.

He felt that currently in the I.N.T.O., people tended to say what was expected of them and to role-play at meetings and conferences. He felt that this was partially about activists believing that they had to keep the senior leadership in its place and kept under pressure. He also felt that part of the behaviour was due to a sense that it was not appropriate behaviour to be in favour of proposals. He also felt it was always easier to be negative. He felt the dominant approach to discussion in the organisation was adversarial. He identified the lack of follow-through by the membership in terms of making the connection between decisions they made and campaigns and developments that resulted.

The General Secretary explained how it was possible to mobilise the membership for a traditional ‘service’ issue but what was most difficult was to get them to engage in the examination of issues. This reflective / evaluative gap was identified in both the Mc Carthy study (1991) and by the Equality Committee in 2000. Sometimes the membership would

react against something, not because of the issue itself but because of a general sense of anger or dissatisfaction. The Deputy General Secretary / National Treasurer said his belief was that the membership perceived the leadership to have gone too far ahead of them - he felt that they might even say they were coerced. He stated that the challenge for the organisation was that, whereas a managed change process may be acceptable to members from the professional point of view, they were feeling overwhelmed by the number of changes occurring. They had become antagonistic to change and in the absence of value being put on their work, they were also angry. He felt the organisation faced a very difficult situation. He felt that there was a representation gap in the structures of the organisation, in terms of their effectiveness. He felt this related to the need to communicate directly with the members using new technology or whatever other method seemed appropriate. He described the current phase of the organisation's development as a period of transition.

The Deputy Secretary General felt that the old modes of communication at branch and district level were no longer operating and no longer reflecting issues back to the top. He believed one of the biggest mistakes that had been made over recent years was the delegating of responsibility for training to branch and district levels. He felt this created a gap between officials, executive members and the ordinary member. He felt that if the senior leadership had been involved in the training, they would have received the messages that were coming from the membership. He also felt that this would have been absorbed into their thinking and they would have slowed down the change process. He did not address the logistical issues such an approach would raise.

He reflected that at C.E.C. level there seemed to be very little debate around issues.

"Since, Joe's leadership has come in, its just automatic and unanimous, and partly due to Joe, and I am not saying this in a critical fashion. Joe is a very persuasive, confrontational type of leader and if you say, as some members have been, that you have to slow down the process, Joe would come in immediately and say you can't slow down, you can't pull back the tide of change etc. There is very little room on the Executive for the alternative point of view. The Executive tended to go a long with the leadership."

The Assistant General Secretary felt that one of the biggest issues in the organisation was the need to try and retain a level of coherence in the organisation in order to try and ensure

there was a connection between the many different areas in the organisation. She felt there was a huge output and that the organisation was stretched to the limit. She felt that there was not a shared vision within the organisation. She described the style of leadership in the organisation as paternalistic but as often securing strong loyalty.

**Output:        The relationship between formal organisational change processes, patterns of participation in the organisational strategy cycle and the organisational learning capacity of the Irish National Teachers' Organisation**

In the final period under review, 1996-2000, there were increasing numbers of women participating in the strategy development/ formal processes / structures of the organisation to the extent that they were in the majority at all levels except national. At this level, the traditional profile of activist still dominated.

Increasingly within the organisation, there were additional opportunities to engage either with special interest groups, conferences or through the training structure. However, none of these alternative structures was formally engaged in the core, formal strategy development processes in the organisation. Even though they appeared to be locations of reflection in many instances, the results of this were not channelled into the traditional formal organisation channels or structures effectively.

The majority of members did not engage with the structures in terms of elected positions or branch meetings. In fact, the participation of members at branch meetings and national ballots dropped significantly.

At national level, the ability of national committees, except the C.E.C., to engage with the rest of the organisation at either national, district or local levels, was highly controlled and a source of frustration to representatives on these bodies. The membership of the C.E.C. was, however, equally under pressure due to the volume of work they undertook, the complexity of issues they had to deal with and the level of contact they maintained within districts.

There remained among the general membership a large and increasing number of members not participating. In addition, special interest groups accorded a place in the organisation were prevented through the brief and structures of the groups from engaging in the full cycle of strategy development processes of the organisation. They remained un-integrated with the traditional structures. Similarly, this impacted on the in-service and trade union training provision. This under or non-participation can be understood in terms of the development of the organisation's culture over time, particularly through its impact on the formal rules, procedures and process of the organisations. It indicates that the organisational culture precluded the participation of groups with different profiles in the strategy development process and other formal organisational processes / structures. This resulted in a limited range of environmental sources of feedback, reflection and strategy implementation within the organisation. This indicates the existence of an organisational learning dysfunction.

Organisational dysfunction inhibiting strategic organisational change in terms of the engagement of the general membership in the strategy development processes and envisioning of the organisation remained largely un-addressed. This resulted in a number of significant strategic defeats, or near defeats, for the senior leadership of the organisation in national ballots and consultative processes within the I.N.T.O. These debates became increasingly adversarial and the nature of the conflict increasingly destructive. The level of participation of the general membership at branch meetings dropped further.

The main inhibitors to change in the organisation towards increasing participation in strategy development and implementation by non or under participating groups appears to have related to the impact of the paternalistic organisation culture within the organisation. In particular, this seems to have included the following considerations:

- The entrenched structures, rules and rule bound processes that ordered the operation of the organisation and the manner in which it regulated its work at all levels;
- The entrenched behaviours related to leadership and membership (paternalistic and authoritative on the one hand and passive on the other). As time based, the nature



of the interaction appears to have become increasingly distrustful and lacking in mutual respect;

- The adversarial manner in which conflict was managed and expressed in public situations;
- The inability and lack of reflective space to envision alternative ways of doing business and the inability to change practice as it was so entrenched;
- The insulation from diversity within the traditional structures, disabling envisioning and reflection skills/ opportunities. This issue remained even though women had increasingly, i.e. the dominant group associated with under participation, taken over the structures.

In addition, the initiation of change in the organisation did not occur in an integrated, systemic fashion. It attempted to mould new structures onto the old without impacting on the old. This, therefore, continued to reduce the level of diversity feeding into the system and caused those involved in the new structures to be frustrated.

This was in a context of increasing environmental complexity being experienced by both the organisation and individual members. No one in the organisation was charged with the integration and management of the change strategy, and in particular the development and monitoring of readiness among the membership was left largely unmanaged. The training strategy undertook this role to some extent. However, it operated as a parallel organisation and often involved members who were otherwise uninvolved in the formal activist structure.

Similarly, the role of staff representative was left without a formal structural link with the rest of the structure, and without clarification of the brief - often being used in a representative function at branch meetings. It was not formally empowered to do this and appears to have had the effect of disenfranchising non-attending members at branch meetings - one vote being counted for the staff representative as opposed to the total vote of a school staff. This was despite the fact that this role was highly regarded by the

membership on the ground, was closest to the 'on the ground' experience and the one members were most likely to have experience of undertaking.

## **Analysis**

It is suggested, therefore, that within the I.N.T.O. the dominant organisational culture precluded the participation of groups with alternative profiles and cultural norms to that of the dominant coalition in the organisation in terms of communal processes of analysis and envisioning. This was in terms of their participation in the strategy and other formal processes and structures in the organisation. This led to a level of environmental insulation among activists and leadership and the under development of organisational processes to enable effective environmental scanning, reflection, decision-making and implementation. In turn, this resulted in an inability in the organisation to bring about strategic change in line with the organisation's changing environment and increasing complexity.

The key factors impacting on the learning, and therefore the strategic change capacity of the I.N.T.O. were the following. One set of cultural values and norms of behaviour completely dominated the organisation. These became highly institutionalised in the structures, rules and procedures of the organisation in addition to the informal norms of behaviour. This resulted in a paternalistic culture where the general membership was passive in their engagement with the I.N.T.O. This created a situation where the leadership / activist groups became insulated from divergent perspectives, experiences and sources of information and reflection. In general, the need for internal change was therefore unrecognised among the dominant activist group. This was even in the face of external expert input identifying the need for this. When internal demands for change arose, it was interpreted as a threat to the power and influence of the leadership / activist groups.

The democratic structures reflected the culture of the dominant group and therefore enabled its participation. They did not act as a balancing opportunity in terms of membership participation. When the profile of those participating in the representative structures altered, the culture of those structures / regulations / rules remained the same - thus continuing to ensure the exclusion of diverse perspectives.

Within an increasingly complex environment, the need for the organisation to change also increased. The strains in the culture of the organisation became apparent at this point as the

relationship gap between the general membership and the leadership widened. This was evident in the nature of discussion and adversarial conflict, and increased levels of non-participation, in the various structures of the organisation. This was to the extent that the power of the organisation began to be undermined.

This resulted from the I.N.T.O. being unable to recognise the need for the required internal change at an appropriate time in response to environmental challenges, to create a sense of readiness for change among the membership and activists, and to institute a properly resourced, managed, system wide, change strategy. It represents a significant learning dysfunction impacting on the strategic change capabilities of the organisation.

In terms of this study's hypotheses and research questions, the following have been found in relation to the I.N.T.O.

The under or non-participation of certain groups of members in the strategic development functions of the I.N.T.O. can be understood as a symptom of an organisational (system) learning dysfunction.

The process by which the dominant organisation culture was established and maintained in the I.N.T.O. provides an explanation for the existence and perpetuation of such participation difficulties and learning dysfunction within this organisation. This relates to the impact of this organisational culture on the patterns of participation of a diversity of organisational members/ actors in the strategic development functions of the organisation.

The focus of attempted change within the I.N.T.O. in respect of these issues was at a non / under participating individual member or group level only. This approach did not succeed in addressing participation and learning difficulties. This was demonstrated by the increasing difficulties experienced in the I.N.T.O. in terms of the willingness of the membership to support the leadership in undertaking necessary, organisationally strategic, change resulting from environmental challenges, impacting on the future survival of the organisation.

These change initiatives in the I.N.T.O. did not address the effects of organisational culture on how and when the membership were involved in the organisational strategy development cycle particularly through its impact on:

- Communication;
- Management of internal conflict / difference;
- Organisational leadership, representative and membership roles.

Specific and congruent arrangements for the management of systemic change, and a timeframe for its completion, were not put in place by the organisation.

The organisation did not succeed in increasing effective membership participation in its formal decision making structures and processes, and did not increase the learning and innovative capacities of the I.N.T.O. As a result, the ability of the organisation to survive and thrive into the future remained in doubt. This experience highlights the relationship issues in learning between the individual member and the organisation as actions to increase the learning of individual members occurred but these appear not to have translated into the increased learning and strategic change capacity of the organisation in terms of increasing the effectiveness of the achievement of the organisation's mission or response to the environmental challenges it faced..

## **Chapter Seven: Case Study Report 3:**

### **Concern Worldwide**

Given the danger of unwieldy case study reports as discussed in chapter four, the approach adopted relates to a combination of two strategies proposed by Yin (1994) to counteract this problem. These were also outlined in chapter four. In addition, the case study database is available from the author. This provides all evidence of triangulation, or the use of convergent lines of inquiry, to establish the 'facts', the 'narrative'. All such detail is fully referenced to the data sources used. A comprehensive list of the data sources is included in the database, as it is below. For detail of all points made in the case study report, reference should be made to the case study database. The format of the description is in narrative form. This conforms to standard methodological practice in terms of case study research methodology and is, in fact, a necessary structure in order to promote an understanding of the evolution and the interconnections between the dynamics under review.

As discussed earlier, the importance of theory in both case study and qualitative research methodology has been highlighted by Yin (1994), Strauss and Corbin (1991) and Pettigrew (1985). This relates to the importance of theoretical context for case study and qualitative research in terms of enabling replicability and representivity - its 'scientific' basis as discussed in chapter four. The Input Output Analytical Model, proposed in this study, has been utilised in the preparation and structuring of this case study report. The model has been developed on the basis of the key themes emerging from the literature review and directly relates to the study's propositions, hypotheses and research questions - in addition to the question metrics attached to the model. It emerges from and is fully grounded in the study's conceptual framework. It has been the instrument guiding the collection, structuring and analysis of the case study data. The approach, therefore, meets the conditions regarding theory in the development of this case study as outlined by these commentators and as discussed in chapter four

The data sources used in the development of the Concern Worldwide Case Study included:

#### **1. Archival Documentation and Records:**

- Council Minutes 1978-2000
- Officer Board Minutes 1986-2000
- A.G.M. Minutes 1981-1999
  
- Annual Reviews 1985-1993
- Annual Reports 1994-1999
  
- Financial Statements 1978-80
- Consolidated Financial Statement (year ending 31st December 1997)
- Concern Worldwide Accounts 1999
  
- Memorandum of Association Concern Worldwide (1993)
- Policy and Structure of Concern Worldwide (May 1994)
  
- Towards Increasing Effectiveness with the Poor: Strategic Plan 1997 -2002 (September 1998)
  
- Concern Management Structure (January 1999)
- Concern Management Process (January 1999)
- Outline Job Descriptions - Management (January 1999)
- Memorandum to overseas and home based managers from the Chief Executive regarding changes in management structure (13th January 1999)
  
- Director of Marketing meeting notes regarding Concern membership: current situation and future objectives (17th November 1998)
  
- Application Form for Membership of Concern Worldwide (1999)
  
- Chairperson's Speech to Concern AGM (May 2000)

- National Review of Charitable Agencies. Confidential Report  
Commissioned by Concern  
(February 1999) Behaviour and Attitudes Marketing Research
- Draft Policy on Capacity Building in Overseas Work (June 2000)
- How Concern Targets Countries for Poverty Elimination - Draft (August 2000)
- Topics for Policy Discussion Between Council and Management (September 2000)
- Changing Strategy on Growth and World Poverty  
Begg D. (Chief Executive) (September 2000)
- History of Concern - Draft (2000)  
Dublin: Concern Worldwide

**2. Direct Observation:**

- A.G.M. (May 1999)
- A.G.M. (May 2000)
- Triennial Review Seminar (September 2000)

**3. Tape-Recorded (audio) open-ended interviews with:**

- Mr David Begg, Chief Executive Officer (1997-2001)
- Mr Tom Arnold, Chairperson (1994 - 1999)
- Mr Tom O'Higgins, Chairperson (1999 - 2001)
- Ms Sallyanne Kinahane, Director of Marketing and Communications (1998-2001)



All of the data gathered, structured according to the chronological development of the organisation, is included in the study's database. The Case Study description is fully referenced in the database document. The references to the Concern Worldwide Database, which provide access to the more specific references listed above, are:

Concern Worldwide Input Output Analytical Model Part : Concern Worldwide Case Study Database pages 2-3;

Concern Worldwide Input Output Analytical Model Part 2: Concern Worldwide Case Study Database pages 3-15, 25-59;

Concern Worldwide Input Output Analytical Model Part 3: Concern Worldwide Case Study Database pages 12-25, 25-59.

### **Analytical Summary**

There was a tradition of strong centralised leadership and authority in Concern Worldwide. The strong, informal and cohesive friendship network that dominated for the first two decades of the organisation's life enabled this. This shared culture was largely action focused and reactive in orientation. A strong concept of the mission of the organisation was shared informally. The operation of power in the organisation was, therefore, largely based on informal influence and networks.

As a result of this, the organisation's strategy development structures / processes / procedures remained underdeveloped. This was also the case in relation to the development of approaches to conflict management and reflection opportunities and skills. The high levels of uniformity and conformity also meant that the organisation was insulated from changes in the external environment, as its capacity to perceive them was limited. A single, unchallenged 'world view' dominated.

When dissonance internally and major challenges externally reached a point where they could no longer be avoided, the organisation was unable to cope. Challenges and alternative perspectives were treated as threats. Few within the dominant coalition were

ready for change. Conflict became personalised and destructive. The climate was highly politicised with various actors vying for power and influence and attempting to undermine their perceived opponents. The organisation began to fragment and the levels of insulation from its external environment remained inhibiting its ability to respond to the environmental challenges it faced.

There was no uniformity of vision for the future or plan. The focus was completely on the current realities, crisis, in which the organisation found itself. The democratic structures and procedures in the organisation reflected the dominant culture that had developed within it. This was with one exception. They allowed the election of two chairpersons from the mid-1990s onwards who did not share all the norms of the dominant culture of the organisation. This fact allowed the organisation to take some remedial strategic action. Their Council membership had originally resulted from co-option rather than from the traditional channel of membership recruitment.

Their alternative cultural norms related to conflict and difference management, communication, strategic thinking, reflection and approach to power / authority. It became possible to build a degree of common vision and approach to the future, though some levels of dissension remained largely related to the former dominant coalition. There was increased engagement in reflection and relationship building among various groups. This aided the rescue of the organisation from the downward spiral of destruction on which it had embarked. It should be noted, however, that the ability of the new leadership at the volunteer and staff apex of the organisation to bring about change was enabled by the culture of strong, centralised leadership within Concern.

It can be seen, therefore, how learning dysfunction developed during the course of the organisation's evolution, impacting on its ability to anticipate the need for strategic change, and undertake such change, in a timely fashion in response to the environmental challenges it faced.

In terms of the study's hypotheses and research questions, the following was found in relation to Concern.

The under or non-participation of certain groups of members in the strategic development functions of Concern can be understood as a symptom of an organisational (system) learning dysfunction.

The process by which the dominant organisation culture in Concern was established and maintained provides an explanation for the existence and perpetuation of such participation difficulties and learning dysfunction within the organisation. This relates to the impact of organisational culture on the patterns of participation of a diversity of organisational members / actors in the strategic development functions of the organisation.

The successful organisational initiative which began to address these participation and learning difficulties within Concern had as its focus change at a systemic organisational level rather than at a non / under participating individual member or group level only.

The change initiative addressed the effects of organisational culture on how and when the Council membership and staff were involved in the organisational strategy development cycle particularly through its impact on:

- Communication
- Management of internal conflict / difference
- Organisational leadership and membership roles.

It had not addressed the same issues in terms of the general membership at the time of undertaking this study. This area remained contentious among the leadership of the organisation.

Specific and congruent arrangements for the management of systemic change, and a timeframe for its completion, through the definition of the duration of the strategic plan, were put in place by the organisation.

In addition to increasing effective membership participation at Council level, this change initiative increased the learning and innovative capacities of this non-profit, democratically structured organisation enabling the more effective achievement of its mission and response to environmental challenges. As the change initiative had not yet impacted on the more general membership participation, the change initiative had not yet addressed the depth of the learning and strategic change dysfunction in existence within the organisation.

**Input output Analytical Model (Part One):      The development of organisational culture at the foundation of Concern Worldwide**

**Input: Profile of founding membership**

Prior to the establishment of the organisation, there were well-developed connections between Irish missionaries in Biafra and the population in Ireland. There were an estimated seven hundred Irish religious personnel in Biafra, for example. When war broke out between Nigeria and Biafra in 1968, the news spread quickly to Ireland, and relief efforts were made by various groups in terms of fund raising and sending medical and other supplies. One group was called Africa Concern.

During this time, a joint visit was made to Ireland by the Catholic and Anglican bishops from Biafra. A meeting was arranged for them by the Knights of Columbanus in Dublin to launch the Joint Biafra Famine Appeal. This served as a focus to unite the efforts of the various groups.

When this joint appeal group incorporated shortly after - for the purposes of purchasing a ship - it became known as Africa Concern. The Chief Knight of the Knights of Columbanus became Chairperson. Two of the principals of the original Africa Concern group became the Managing Director and Company Secretary. During the first year, a number of voluntary teams of specialist medical personnel and others were sent to various places in the conflict zone. When the Biafran forces capitulated to Nigeria in 1970, this occurred at a Catholic mission. The parish priest of this mission became very involved in the work of the organisation as time passed - as did his brother, also a missionary priest.

In the same year, a need to consider the future of the organisation was perceived by the Chairperson. He stated that the organisation needed to broaden as it became more permanent. The organisation expanded its areas of work into Pakistan, Calcutta and Bangladesh and various other locations. There were fifty volunteers working in these by

1975. The organisation's profile in Ireland developed, as did the demands being made upon it.

During the late 1970s, the organisation experienced a major financial scandal involving the Director of the organisation. Aside from the direct loss of finance, the scandal caused major problems for the organisation in terms of its public credibility and trustworthiness among the Irish public.

In response, the organisation appointed a new Chief Executive who had credibility and who was a trusted figure. It appointed a missionary priest who had been involved with the organisation abroad - the brother of the parish priest mentioned earlier. He had been involved since the early years of the organisation and had established relationships with many of its volunteers. He was action oriented, charismatic and was able to develop a credible public profile.

Also during this period, volunteers returning to Britain from working with Concern abroad established a separate organisation - Concern UK. It was hoped that the two organisations would work in tandem. Relationship difficulties, however, prevented this.

The nature of the incorporated structure determined how the membership was admitted into what was now called 'Concern'. Existing members were required to nominate new membership candidates. Therefore, in the main, those who became members had established relationships with those already in membership. These consisted largely of returned volunteers from locations where Concern was active. This group shared a strong sense of common, significant, experience.

The volunteer leadership operated through 'Council'. This was elected at the A.G.M. It met four times annually.

### **Decisions regarding structures, rules and procedures**

Due to the increasing numbers of volunteers in the organisation, formal guidelines for volunteering with Concern were developed.

An internal commission was established to propose a structure and operating policy for the organisation. This reported in 1975 and was adopted.

The rules / structures / processes that were put in place in the organisation during this period appear to reflect the requirements of incorporation. These determined that there would be a Board of Directors, Chairperson, Vice Chairperson and Honorary Secretary. There was also a Company Secretary. The Board was called the 'Council'. This was a large body of thirty-five elected members. It met four times annually. Its membership was elected at the A.G.M.

All members were invited to attend the A.G.M., to vote in and run for election. Resolutions could also be put to the A.G.M. To become a member required nomination by two existing members.

The organisation employed staff from an early stage. The Director was the senior member of staff. It appears clear from the financial scandal that occurred that the administrative, financial and accountability procedures were not well developed up until the 1980s. The records of the organisation also suggest that the keeping of minutes of meetings during the early period was irregular.

The main focus of the operation of the organisation was not on formal organisation development but on responding to needs as they arose in the 'developing' world, and engaging in fund raising initiatives to support these efforts.

**Behavioural norms – communication, conflict / difference management, formal / informal organisational roles**

From this juncture, it is hard to identify the norms of informal participation that developed. It can be seen, however, that those involved shared a strong sense of common vision and convictions about the work of the organisation. They also shared an action oriented and reactive approach. The new Chief Executive appointed following a financial scandal in the organisation epitomised these cultural values and norms and was at the centre of a strong, informal relationship network.

From the lack of apparent internal accountability that had developed in the organisation resulting in the financial scandal, it seems that the Director / Chief Executive role in Concern had a high level of centralised control and authority in the organisation. The organisation appears to have appointed a person who could fill those shoes when a new Chief Executive was employed. It was felt that this helped the credibility and perception of trustworthiness of the organisation - a strong sense of personal leadership. The response to the financial scandal seems not to have aimed to increase levels of internal accountability. It did not appear to be reflected in the development of the strength and influence of the senior voluntary leadership of the organisation, or of the Council as a body.

**Output:        Patterns of organisational participation and their relationship to the formation of organisational culture**

There appears during the foundation period to have been little strategic development or decision-making focus within the organisation. Its operation appears to have been determined by reaction to crises as they arose, and by requests for help particularly from informal friendship or collegial networks.

The engagement of the membership was limited to the A.G.M., or if a member of the Council, to meeting four times a year. It appears from the financial scandal that occurred during this period, that the Officer Board of the Council was not regularly in contact with the day-to-day management or development of the organisation.



The senior member of staff, the Director / Chief Executive, appears to have largely determined the management of the operation of the organisation and the decisions made. When a new Chief Executive was appointed, this approach to management continued. This was, perhaps, not least due to the strong informal relationship network that existed in the organisation, and the related strong sense of common experience and vision.

It is probably true to suggest that the membership in general under participated in the decision making and strategy development of the organisation during this time. It also appears that there was a strong, informal sense of common vision and experience among the membership. There were few divergent voices or people with diverse profiles involved.

This under or non-participation can be understood in terms of the development of the organisation's culture over time. This suggests that the culture determined the levels of participation of the membership in the strategy development process and other formal organisational processes / structures. It also precluded the participation of people with different profiles in the membership of the organisation. The formal structure and related processes helped the establishment of this pattern, and subsequently assisted its maintenance.

These factors indicate that there was a lack of diverse sources of feedback and reflection included in the formal organisational processes and strategic thinking. This indicates the development of an organisational learning and environmental scanning dysfunction.

These remained unrecognised as matters of concern or action. Formal processes, procedures and structures remained underdeveloped. Therefore, the organisation's response - or rather lack of it - to participation issues did not enable greater participation of under or non-participating members in the organisation's development, formal and strategic processes / structures of the organisation.

**Input output Analytical Model (Part Two):**

**The development of the  
organisational learning capacity of  
Concern Worldwide**

**Input: Profile of the membership**

The Chief Executive remained in position until 1997 - his contract was renewed in 1987. On his retirement, he was described in the Annual Report at the time as the 'personification' of the organisation. He had been Chief Executive of Concern for fifteen years. Subsequently, he remained as Chief Executive of Concern U.S.A.

The organisation expanded into many new countries. The number of local or national staff increased as a result of this - particularly in response to crises in Ethiopia and Sudan. The organisation employed in the region of 4,198 locally recruited staff in nine countries. However, the number of volunteers travelling abroad reduced. In 1986, for example, there were eighty-six volunteers. It was also increasingly common for volunteers to extend their service overseas on quasi-professional terms - usually in supervisory or training roles. The organisation in Ireland also had a growing number of paid employees.

The profile of the membership of the organisation remained as before - returned volunteers. Even though the constitution allowed anyone to become a member, once they were nominated by existing members, the established profile of membership had become the accepted norm. The source of new members reduced, however, as the numbers of volunteers decreased.

The need to recruit young people into membership was raised as an issue at Council. It is also evident that practice was not uniform in terms of involving new people where local Concern groups existed around Ireland - particularly in relation to formally affiliating to the organisation.

In 1988, a concern was evident at Council of the need to keep a range of expertise among the members of the Council. The Chairperson stated that people could be co-opted to Council even if they were not members of Concern. The need to develop external influence networks with other organisations was also mooted.

A suggestion was made that increased numbers of volunteers could also be involved in the work of the Head Office. The Chief Executive, however, stated that relying on volunteers to undertake essential work created difficulties.

By 1990, 4,357 locally recruited workers, and 87 expatriate volunteers (47 first time volunteers) were involved in the work of Concern 'in the field'. These volunteers were recruited from Ireland, UK, USA and Canada.

In 1993, Concern operated in thirteen countries with 141 expatriate volunteers, 4519 national / local staff. 60% of volunteers were first time volunteers. This was described as a worryingly low number by the Chairperson and that there was a need to increase this number. It was stated that the organisation did not intend to adopt a policy of recruiting volunteers with high levels of expertise and 'specialism'.

A large number of volunteers were on short-term contracts. This represented a major recruitment problem for Concern.

The recruitment of volunteers for overseas work was becoming an increasing issue for the organisation. At Council, the Chief Executive stated that many factors existed affecting the recruitment of 'traditional' volunteers. Many existing staff, including all current field directors, had originally been volunteers as were many Council members, fund-raisers and active voluntary workers. He stated that the organisation would inevitably change if its capacity to recruit volunteers diminished.

Discussion of the issue at Council identified the following. Volunteer recruitment difficulties was believed to be a result of the employment market at home. It was felt volunteers were not coming forward until becoming established in jobs.

Host countries appeared reluctant to accept expatriate volunteers if the required skills already existed among natives of the host country. Therefore visas were not being issued.

There was a large number of highly skilled and experience local staff. It was, therefore, very difficult to put inexperienced volunteers in supervisory roles. This indicated a need to utilise volunteers differently.

Technical assistance was out of favour and donors did not want to fund expatriate technical assistance if they could find alternative local non-governmental organisations to undertake the work.

The Council also questioned whether returned volunteers were being effectively harnessed in the marketing of Concern in Ireland.

Some of these factors contributed to a downsizing of the staffing compliment of the organisation at home and overseas. The Chief Executive at a Council meeting in 1996 stated that, in relation to the costs of the organisation in Ireland, the use of volunteer effort should be considered. He believed that there was a pool of people willing to help the organisation that had not yet been tapped. This represented a reversal of the view he articulated during the previous decade.

An organisation name change occurred the same year - to 'Concern World Wide'. This reflected the international profile of the overseas workers in the organisation - 107 Irish, 38 UK, 2 USA, 1 Canadian, 1 Dutch, 1 Indian, 1 Bangladeshi international staff members. These, had, in the past, been volunteers.

In 1994, marketing research undertaken in the Republic of Ireland showed that the Irish support base for the organisation was broadly representative of the main demographic groups in society. There was a slight bias towards women and young people. Almost half of public donations were from people under 35 years of age. Donors, however, were not included in the membership.

The membership profile of the Council and organisation remained largely the same, although ageing. Legal advice was sought to clarify whether those standing for Council membership had to be members of Concern - even though the practice had developed that non-members were co-opted to the body.

At a Council meeting in September 1993, it was requested by a member that a membership policy be developed. The Chairperson asked him to put proposals in writing for consideration by the Officer Board. In 1994, it was agreed people involved with Concern World Wide could be made aware of the procedure for gaining membership of Concern. This did not mean, however, actively encouraging them to apply for membership of the organisation. The Chief Executive asked that the membership issue be considered particularly in relation to children and expatriate staff.

At the 1994 A.G.M., only sixty members attended. Insufficient nominations for Council places were received. The Chairperson commented that younger people and women were under represented on Council.

At the same A.G.M., a new Chairperson was elected. He had become involved in the 1980s, having been invited to become a member of the Council. He had not been a volunteer with or member of Concern. He was a civil servant who had worked with the E.U. in Africa and in Belgium on the E.U.'s development aid programme.

It was decided that the organisation needed to have a presence in the U.S.A. in order to help shape the international debate and help the organisation secure resources. As a result,

Concern U.S.A. was established as an autonomous organisation. The Chief Executive of Concern World Wide was also appointed to the same role in Concern U.S.A.

### **Communication, conflict / difference management, participation styles and roles**

The same norms of informal participation that had developed in the earlier period continued. There was a heavy reliance on both the role and person who occupied the Chief Executive position. He provided the direction and the decision-making function within the organisation to a very large extent. There was also an increasing presence and reliance on paid staff within Concern in Ireland. When it was mooted that volunteers could become more involved in undertaking work in Head Office during the late 1980s, the Chief Executive replied that it would cause difficulties to rely on volunteers to undertake essential tasks in Head Office.

There was, however, a sense of lack of control within the organisation. Reactions to emergencies, consequent increases in staff at home and particularly abroad and the heavy dependence for funding on public donations that were largely influenced by the occurrence of disasters all contributed to this. Funding raised for these purposes had to be spent in this way - rather than on the general development work of the organisation. Due to the earlier financial scandal, there was a particular consciousness of this.

Communication with the membership tended to be one way - from Head Office down. Members received only one mailing per year, and that related to the A.G.M. The A.G.M. was usually the only organisational event they were formally invited to year on year. Members of Council received four mailings a year related to meetings of Council. Few attended the A.G.M. so the overall level of participation appears to have been very low.

Interviews undertaken for this study indicate that there was a high degree of interpersonal destructive conflict and narrow, political behaviours among staff at this time. The impression the new Chief Executive (appointed 1997) had of the period was that there were huge disagreements within the organisation - requiring that an outsider be appointed to the position of Chief Executive. His initial experiences of staff meetings indicated a poisonous

and highly, narrowly political and conflictually destructive culture. There had been a lot of positioning for the senior management role. He also referred to the philosophical or ideological debate that occurred within the organisation regarding its future.

He described the situation as relating to two groups. There were the people who had been the long term 'servants' of Concern who felt that the best thing was to continue as things had been before. The organisation had been a success story. Others were very anxious to change the organisation in line with the developing thinking in the sector. The degree of contention between the two was very strong. The new Chief Executive reported that this impacted on the attempts to develop a strategic plan. These foundered, as he understood it, not on the content of the plan but on whether there should be a plan at all. It was a badly divided organisation

This experience was reflected in the findings of the report produced by external consultants. Towards the end of the 1980s, the Council decided that a report should be prepared on the structures and operating procedures related to Council-Management Interaction within the organisation. This suggests that difficulties were being experienced in this relationship and between the respective roles. External consultants were appointed to undertake the task.

The report, included reference to the need for a more team-based approach, a consensus oriented management process and improved communication at all levels. Regarding the implementation of this report, the Council stated in 1992 that there should be significant effort to improve communication within the organisation. It continued that an attitude change was essential to the successful implementation of the recommendations. The team approach to management was critical to future success in developing the operation of the management process. It was agreed that guidelines to regulate the flow of information would be drawn up. This took place when Council decided that a framework for Council - Management Interaction should be developed. The achievement of all of these appeared to have been delayed as a result of pressure of work resulting from international emergencies experienced by the Chief Executive. At the last Council meeting of 1992, it was proposed by the Chairperson that this work be put on hold. However, following debate, it was agreed

that the work should be completed as soon as possible - requiring the senior management of the organisation to undertake this. This indicates that there were tensions between the leadership at the apex of the organisation (volunteer and staff) and the general membership of Council.

Later the following year, during discussions at Council, it was stated that the Council should not be seen as a 'policeman' but as an aid to the work of management. The completion of these various policy and other documents were further delayed, and the Chairperson eventually requested the Chief Executive that they be ready for the first meeting of Council in 1994.

In relation to the role Council played during this period, there appears to have been a feeling among some of its members at least that the body acted as an ad hoc committee. It did little except approve what was presented to it, much of which was a fait accompli - as for example the establishment of Concern U.S.A. On one occasion, it was stated that it was important that Council made the 'right decisions' that keep the loyalty of those who worked for Concern and its donors. Support was still evident in the numbers of donations being received - and it was, it was stated, important not to give the impression of crisis.

The Chairperson from 1994 onwards, reflected that it was the management's duty to propose things, to put certain things on the agenda of Council. It was Council's duty to formally decide. He noted, though, that there was a grey area around issues that were not in the natural domain of interface between the Council and Management. He stated that there had been an attempt to ensure that the Council did not get involved in management issues that were properly the remit of the management.

The Council did have certain issues that it raised with management. Issues, for example, like the role of volunteers in the organisation.

There was tension regarding the retirement of the Chief Executive. He requested that his contract be renewed although he stated that the continuance of his employment was not



dependent on this. He had also been suffering health difficulties during this period. He decided to retire in 1996, although he stayed on until the following year until his successor could take-up the position. He continued as the Chief Executive of Concern U.S.A.

The Chairperson during the latter part of the period commented on the ongoing sometimes acrimonious debate in the organisation, particularly amongst the staff and Council members, regarding the direction of the organisation, planning and capacity building. He believed that the difficulties had resulted in part from two factors. The terminology used in relation to 'capacity building' was alien to many, particularly the longest established in the organisation. The second was the impact on the organisation of the Chief Executive's action-orientated approach. This influenced the nature and level of reflection and discussion that occurred, and the value placed on strategy and planning.

He felt that during this period, as Chairperson, he had acted as a mediator between people on either side of the debate. He had undertaken 'ground-work' with them in the hope that what would emerge within the organisation would be a rational approach to the issues faced. He felt his task was to ensure that a conclusion was reached - rather than directing the organisation to any particular conclusion. Given the climate in the organisation, resulting from financial 'cut-backs' amongst other things, discussions were often fraught. People brought 'baggage' to the table involving personalities, histories and their individual agendas.

Owing to the budgetary situation being experienced, the Officer Board began to meet regularly during this time. This became normal practice from then on. The Chairperson increasingly placed developments within the organisation in a strategic context and reminded the Council and A.G.M. of the changing environment in which the organisation was operating.

The Chairperson also noted that, since the 1980s, there had been a feeling that some sort of organisational evaluation should be going on. Many issues were put on the agenda of the organisation, and Council. This resulted from the instigation of committees or by sheer

force of argument of some individuals. It had proved difficult to establish a formal process to enable local staff to input on issues or to put issues on the organisation's agenda - even though there was a concern about this at Council.

The Chairperson felt the difficulties related to two factors in particular. The distances and costs involved in enabling local staff to become involved in formal decision-making and strategy development processes in the organisation were prohibitive. Secondly, the Constitution/ Articles of Association prevented employees from being members of the organisation. This had been investigated but had been found to be the case. He felt that this was reasonable given the need to maintain a balance of accountability within the organisation.

His successor stated that during this period that, he believed, there had been too much consultation regarding the strategic planning process and not enough decision-making. He believed that the unity of management thinking had forestalled action and change within the organisation - resulting in the institutional thinking in the organisation not keeping up with changes in its environment over time. It was his impression that there had been a kind of nostalgia among those who had come through the organisation for their time spent together in Bangladesh and for the organisation when it was comparatively small and family like. At times, others experienced this as being quite exclusive and excluding.

He stated that the role played by the Chairperson from 1994 on had been essential to the survival of the organisation. He had attempted to bring everyone 'into the tent' at a time when there was serious division, tension and confusion as well as financial pressure in the organisation. He held the organisation together when it was extremely fragmented.

A staff source reflected during interview on what was going on in the organisation at that time. She suggested that it was the beginning of the end of the way things had traditionally been done in the organisation. As a result, there was a lot of internal strife about the way work was undertaken. There was a lot of personality based and personality driven interaction between various individuals, perhaps, even, a power struggle. This battle

reached Council level and it was divided. When the Chief Executive resigned, other staff members in positions of relative power within the organisation were hoping they would become the new leadership. There was a lot of destructive conflict and a lot of people appeared to have been damaged by this. Stories were reported regarding the main staff protagonists in this - orchestrating campaigns against others that were very personally damaging. It was also observed that there seemed to have been a lot of sick leave taken at the time.

**Output: Participation patterns in the organisational strategy cycle and their relationship to the development of organisational learning capacity**

During the 1980s, the established patterns of participation continued. This implied the dominance of the Chief Executive in the organisation's formal and strategic processes and the comparatively marginal involvement of the membership generally or at Council level. These patterns may have become further entrenched as a result of the employment of increased numbers of full time staff in the organisation. There also appears to have been an attitude held by the Chief Executive regarding the utilisation of volunteers / members in the work of Head Office. In addition, there seems to have been some difficulties experienced in the interactions between the Council and Management as indicated at the end of the decade by the decision of Council to have the relationship formally reviewed.

The established source of new members was decreasing with changing patterns of volunteering for service abroad. There was also an increase in the numbers of local staff employed by Concern abroad. These had no formal input into the organisation's strategy development or at the organisational apex.

The membership of Council was becoming conscious of the need to encourage young people to join the organisation, and to increase the skill base of the Council and its external influence network. This may have been as a result of both the ageing profile of the existing composition of the Council and as a result of the organisation's changing environment. As a result, there was a decision to co-opt members of Council who were not already members

of the organisation. In general, however, these still appear to have been people who had experience of volunteering or working in the 'developing' world. They also remained in the minority. Few younger members joined.

It also appears that there was a pattern of non-participating members of Council. It was suggested that those who had not attended a Council meeting for three or four years should be required to be re-nominated before being allowed to stand for election again. This suggests that the membership of the Council was quite static.

A pattern of under participation by the membership, a decrease in new members from established sources into the organisation, a slight increase in new membership resulting from co-option to the Council (although with a broadly similar profile), and little or non-involvement in the general membership of the organisation by those with alternative or diverse profiles continued. Despite the fact that during the decade the organisation had employed a large number of national / local staff in its fields of operation, they had no formal involvement in the formal or strategic structures and processes of the organisation. Ostensibly, this was because they were in the paid employment of the organisation and, therefore, could not become members. Paid employees of the organisation were precluded from membership of the organisation - to maintain a balance of accountability within Concern.

Similarly, the target groups with whom the organisation worked had no formal channel of influence or representation within the organisation.

A number of local support groups operated in Ireland. These did not have any formal relationship with the organisation. They had no involvement in the organisation's strategic or decision making processes or structures.

This under or non-participation can be understood in terms of the development of the organisation's culture over time. This indicates that the culture continued to preclude the participation of groups with different profiles to the dominant coalition in the strategy

development process and other formal organisational processes / structures. The organisation's response to the participation difficulties did not enable greater participation of these under or non-participating members in the organisation's development, formal processes / structures of the organisation. Neither did it open the membership to people with more diverse backgrounds.

Between 1990-96, the same profile of membership and leadership existed. However, during this period there were severe conflicts between the Management / Chief Executive and Council, within the Head Office staff, and within the Council. The period was dominated by major crisis internally and externally, to which the organisation appeared to have difficulty responding.

It has been suggested that during the period of the foundation of Concern and through the 1980s, the patterns of participation that emerged can be understood in terms of the development of the organisation's culture. This indicates that the organisational culture encouraged the participation of some and the exclusion of others in the strategy development processes and other formal organisational processes / structures of the organisation as a result of their differing profiles. This indicates the development of an organisational learning and environmental scanning dysfunction within Concern at that time.

The organisation's response to these participation patterns did not enable the participation of the under or non-participating groups. There were a number of factors that appear to have influenced this. The organisation was highly dependent on the senior member of staff for the development, direction, decision-making and credibility of the organisation. This was enabled by the existence of a strong, informal relationship network enabling cohesion within the organisation. This was strengthened by an informal, commonly held vision of the purpose of the organisation by this dominant group. It had a strong sense of ownership of the organisation.

The approach to the organisation's work was strongly action oriented and reactive. By the late 1980s, this appears to have resulted in a sense of lack of control due the high levels of dependency on public donations related to emergency appeals and a greatly increased staff compliment also resulting from responding to emergencies. The limited diverse sources of environmental feedback at decision-making levels, and within the reflection processes, of the organisation ensured that for much of the time until the late 1980s, there was little dissonance in the organisation. Therefore, the organisation was not required to acknowledge and respond effectively - strategically - to changes in the organisation's environment in a timely fashion, or to the internal development needs of the organisation. The situation was further exacerbated by the organisation's underdeveloped formal accountability and strategy development processes, in particular the limited occasions of formal common reflection and knowledge development.

By the end of the 1980s, however, there were indications at Council level that the cohesion within the organisation was diminishing. Dissatisfaction was evident among some within Council regarding the roles played and interaction between the Council and the management.

Until the mid-1990s, the organisation experienced extreme difficulties in reacting effectively to the major challenges it was experiencing internally and externally. The input of external Consultants in the early 1990s aided the strategic focusing of the organisation, and provided a diverse input that was not otherwise available to it. There were, however, major delays in acting on their recommendations. The blocks that appeared to inhibit an effective response to crisis appeared to relate to:

- A history of insulation from changing environmental conditions among the senior management, some staff and some Council members, and an inability to take on board diverse experiences and perspectives;
- The centralised management style and philosophy of the Chief Executive including suspicion of the Council;

- A history of under participation in decision making and strategy tasks by the Council including a history of lack of effective accountability of the Chief Executive;
- An over concern with action and reaction in the senior management and significant numbers of the staff and Council members, and an undervaluing of planning, reflection, evaluation and strategic consciousness and development. This resulted in a lack of readiness for change among the senior staff leadership and the historically dominant membership group;
- Poor communications at all levels;
- Division among Council / management / staff regarding the future of the organisation and the way it should undertake its work;
- Adversarial, interpersonal conflict;
- Lack of developed reflective space / skills in the organisation.

The initial response to the crisis did not enable greater participation. However, the intervention of the Chairperson elected in 1995 did so. While he shared some characteristics with the dominant group of the membership, he had not been a volunteer with the organisation, and professional he had a strong managerial background. The Chairperson adopted an alternative approach to conflict management, communication and negotiation than had been evident to that point. This suggests that he did not share the organisation's established culture particularly in terms of behavioural norms, but understood its operation. He was, therefore, able to engage with it whilst remaining removed from it. This provided space for the organisation to stop or at least reduce its spiralling to destruction. He also provided leadership that enabled important administrative and managerial resources to be put in place, and some significant decisions to be made in a similar vein. He also enabled an internal strategic focus to be established - despite the failure of frequent attempts to do this to this point.

The period under discussion was increasingly dominated by adversarial conflict over control of the direction of the future of the organisation. The conflict emerged from within the established membership and staff. It also related to the manner in which the

organisation determined its future - through a planned process or through reaction to external events. This took place within the context of major changes occurring within the organisation's environment.

This conflict can be understood in terms of the development of the organisation's culture. The insulation of the leadership and dominant membership group in the organisation from changes in the organisation's environment over a lengthy period occurred. This resulted in their inability to contend with an environmental crisis facing the organisation in the early 1990s - even when both financial and its traditional source of human resources were in decreasing supply, and alternative approaches were immediately required by both its target countries and its institutional donors.

Some of these changes had been flagged during the previous decade. When an alternative approach was strongly articulated, it resulted in adversarial conflict - as the ability to consider new data, reflect on this, develop common understandings and vision, and adopt alternative explicit strategies had not been developed. The divergent view was experienced as a source of threat. The mechanism to deal with conflict had not been developed in the organisation as a result of the dominance of a central authority figure and the cultural norms and informal understandings he shared with the dominant group in the organisation.

This indicates an organisational learning dysfunction related in particular to:

- The insulation of the leadership and dominant membership group from changes in the environment / alternative perspectives;
- The under development of a strategic context within the organisation and related processes and procedures to enable constructive contention, conflict resolution, reflection and analysis;
- The perception of the organisation as a sphere of personal control, influence and power among those sharing the established culture of the organisation. This resulted in the organisation becoming an arena for destructive adversarial conflict.



**Input output Analytical Model (Part Three):**      **The relationship between the strategic change capability, the organisational learning capacity and patterns of membership participation in Concern Worldwide**

**Input: Profile of the membership**

In 1997/1998, there were in the region of 850 members of the organisation. Twenty new members joined in the period 1998-2000. There were thirty voluntary support groups around the country but only ten were active. They had no structural link with the organisation. A strategy to develop Concern shops around the country was adopted. It was envisaged that these would also act as regional resource centres. Two had been established by 2000.

The membership was ageing and declining. It was still dominated by returned volunteers of the 1970s and 1980s. Many members of Council had been members for twenty years.

A new Chief Executive was appointed and took up his position in 1997. He came from a trade union management background and had no previous history with Concern.

In 1998, the organisation was operating in nineteen countries. By the following year, it was in twenty-three - including two European countries for the first time. Within the programmes operated, the objectives included increasingly enabling local management by local agencies and the 'poor' whom the projects were established to serve.

In 2000, there were 108 international staff and 1947 locally recruited personnel.

A new chairperson was elected in 1999. He had a similar profile to his predecessor in terms of his involvement with Concern. He made the point that it was important that the organisation did not 'pack' the Council with professionals. There needed to be a wide

spectrum of Irish life represented. There was a need for certain skills, however, particularly those related to financial literacy.

In 2000, there were twenty-seven people elected to Council indicating that the full compliment was not filled. Among those, there were a number of engineers, a former Honorary Secretary of the organisation, an ex-army general, nurses, teachers, academics, a former National Secretary of one of the political parties and the Director of the Chamber of Commerce of Dublin.

The new Chairperson believed that any change in the structure of the organisation would not discourage participation as a result of increased bureaucracy often associated with membership organisations. He felt that Concern had a strong institutional culture derived from the volunteers that were the heart of the organisation from its inception. He believed the number of volunteers had declined as a result of social change.

The Chief Executive was still the main source of leadership in the organisation. Although, since 1994, those occupying the position of Chairperson had also played significant roles particularly in terms of holding the organisation together in times of trauma, and in enabling strategic change in the organisation. All three, had been sources of reflection and analysis.

The Chief Executive believed that being a membership organisation should give the organisation a huge advantage. This was because it should achieve more effective integration with the population at large - for example, through the presence of the organisation on the ground through someone known locally. This should create a broader commitment to the work of Concern - with tentacles reaching out into every part of Ireland, and the possibility of political strength being achieved in campaigns.

However, the Chief Executive observed that the membership base was not as strong as he would have liked and it was also ageing. The culture of volunteering was declining and, therefore, the traditional source of membership was declining. This also related to the

impact of the changing approach internationally to development aid - that is the non-encouragement of unqualified volunteers for overseas work.

According to the Chief Executive, one of the questions this posed for the organisation, based on its traditional approach, was would there be enough people going through the organisation to create a central core of managers for the future. This also related to the need to retain the human linkage with Ireland. That was something that was becoming harder to achieve. The membership was ageing and there was a need to find some way to revitalise the membership. There was also a need to open the membership in terms of who was enabled to join. The Chief Executive felt that there were people who would be very interested in becoming involved in some way but that, currently, it was a very exclusive club. One had to be proposed and seconded by existing members. There were people who did not know how to join, or who to ask. If the organisation adopted a strategy of explicitly recruiting members, he believed, it would get a much bigger membership. This had been a strategy that had been rejected by the organisation in the past.

By the end of 1998, the recruitment of volunteers for overseas work was a still major problem for the organisation. The Council felt the organisation should actively target groups in third level institutions. It was also suggested that strategy should be developed to encourage volunteers for home service who might progress to overseas work.

The Strategic Plan 1997-2002 sought to secure the support of high profile people within the Social Partners to develop the corporate sector in terms of fund raising and influence in a consistent manner.

By 1999, a meeting took place with Concern Universal in Britain with a view to developing co-operative strategies.

## **Change arrangements**

At the 1997 A.G.M, a motion to review the structure and composition of Council was proposed. This included the criteria for appointment and election to Council. The review was presented to the A.G.M. in 1998.

In early 1998, the Officer Board sent a memo to Council. This stated that one of the great strengths of Concern was that it was a membership organisation. However, the narrow profile of its membership meant that the advantage had not been exploited fully. There was a need to create a situation where a greater number of people could identify with and become involved with the organisation. The organisation had the potential to be "The People's Agency" based on transparent democratic principles. The memo recommended that the organisation should seek to maximise the potential of being a membership organisation with a campaign to secure greater public engagement and to revitalise the support structure where this was viable. This reflected the view of the Chief Executive.

At the 1998 A.G.M., a need to maximise Concern's potential as a membership organisation was stated. This was in order to secure greater public engagement. It was also stated that the local support groups needed to be reactivated, and some way found to assess whether existing members were still active in their support for the organisation. Further to these points, it was emphasised that, whatever actions were taken to activate or increase membership, these needed to be effectively resourced.

In interview, the Chief Executive made the point that if the organisation recruited members it also would have to provide a way for them to engage with it. At the time, the engagement with existing members was low. Each received a mailing for the A.G.M. and an invitation to that. Members of Council received mailings for those meetings and could attend. Unless they were also regular donors, that was the limit of contact - except in exceptional circumstances when an event like the reunion in 2000 was organised. Regular donors received fund raising mailings from time to time.

The Chief Executive indicated that an integrated strategy to address these matters had been put in place. However, to make this meaningful, he believed the organisation had to change its governance structure. It would have to create some kind of regional assemblies, where members could be elected onto the Council - rather than let it remain as a sort of reserved club. He believed that the politics of trying to achieve that level of change were formidable.

The newly appointed Marketing Director was charged with responsibility for the development of regional development and a membership drive. This was because of its relationship to fund raising, public profile and lobbying activity. In interview, she stated that there was a need to look at membership as more than a constituency for governance - as she interpreted the current practice. She questioned how the organisation might involve more people on this island and in other areas, in order to have a more representative structure, a more representative constituency of supporters owning the organisation. She stated that if one of the ways to make a real impact on poverty was by building and supporting civil society, then there was a huge strength in the organisation doing it itself in its 'core market' or 'operational environment'. That would be a resource and support for the development of civil society where the organisation worked.

The Chief Executive sought the reduction of the size of the Council and an increase in frequency of its meetings. The Chairperson of the time explained why this was rejected. He stated that there were advantages to having the larger group. It allowed a wider group to participate in the organisation. It also provided the opportunity for a wider pool from which other people could be selected to serve as officers.

The question of the representivity of Council of countries in which Concern worked was raised at Council. The Chairperson replied that the membership issue was being addressed and that the view was that the Council election was a democratic process and should remain so. In interview, he identified two issues that impacted on the participation of those people in countries in which the organisation worked. The first related to the costs involved in

bringing people to Ireland, and the second related to the fact that many of these were staff constitutionally prohibited from becoming members.

In 1998, there were increased levels of public donations. This was largely in response to international crises and the employment of the new executive in this area.

A Corporate Advisory Group was established to increase the effectiveness of public fund raising.

The long awaited strategic plan was completed 1998 - six months after the new Chief Executive took up the position. It was stated in the document that both in Ireland and overseas, participation in decision making led to a greater, and more sustained commitment to achieving developmental objectives. In Concern's overseas work, the organisation believed in a high level and quality of participation by its target group in decision-making about developmental initiatives taken on their behalf, the implementation of such initiatives and the benefits that derived from them.

The strategic actions to be undertaken in this respect included:

- Accessing and influencing policy makers on advocacy issues;
- Information exchanges;
- Lobbying to maximise donor aid and quality;
- Raising Concern's profile and agenda.

Developing a programme of feedback to donors to build loyalty, relationships and commitment, and securing the support of high profile people within the Social Partners was also included.

The strategy continued that through development education and awareness raising activities, Concern would seek to keep the public informed of the reality of poverty and the structures that perpetuate it. Its advocacy would seek to influence decision-makers to design, adopt and change policies and practices in furtherance of a just and equitable global

order. Though advocacy was not new to Concern, opportunities for embarking upon a more proactive strategy alongside development education had been enhanced by significant changes in the social and political environment, the organisation believed. It observed that to differing degrees, policy / decision-makers world wide were generally more open to change and increasingly responsive to N.G.O.s. Opinion formers within the public, and probably the public itself, were now more supportive of the idea that poverty cannot be tackled by charity alone and that it required changes in government's performance in relation to their citizens. They saw that abuse of power, lack of democracy and denial of human rights were an integral part of the problem of poverty. Overseas, the potential for working with local N.G.O.s had increased, the capacity of whom might be strengthened through advocacy, particularly southern advocacy.

The Annual Report (1998) challenged the organisation to adapt in new and innovative ways in order to address the ever-increasing needs of the Poor. It envisaged greater emphasis being placed on development education, advocacy and capacity building of local groups within developing civil societies. The report indicated a particular conceptual development within Concern in terms of the relationship between Civil Society and development work. This, it stated, coincided with the analysis that development would only take place in a democratic environment with respect for human rights, and with a vibrant civil society composed of informal and formal trade, professional and social groups.

Within such societies, the report continued, it was envisaged that this would be an important role for local N.G.O.s. The traditional role of service delivery, it believed, was fast disappearing. This thinking coincided with emerging policies of developing country governments and would require careful strategic responses from Concern.

Many analysts predicted that the main role for northern N.G.O.s would be as advocates for good development policies by donors and the U.N. This would require such advocates to achieve legitimacy by their statements being clearly related to their practice. A start had been made on this, the report said, in Concern but a lot remained to be done in targeting its

development education and advocacy initiatives with its overseas programmes - and creating long term goals and performance measures for them.

In the same year, Concern implemented a number of external evaluations of a number of overseas projects. The results of these fed into the work of the Monitoring and Evaluations Subcommittee. It was intended to develop non-financial performance indicators. This was in partial recognition of the need for best practice monitoring in order to help Concern to deliver improvements beyond its own experience - to bring knowledge into the organisation and to share its own knowledge with others. This was to help it position itself as an agency interested in quality - and yet to institutionalise good internal capture of useful knowledge and ensure its use.

It remained easier to harness funds from the public for high profile emergencies rather than for the less dramatic but the equally important work of addressing the causes of poverty.

During this period, Concern became involved in Kosovo and Turkey. This prompted an internal debate as to whether the organisation should be there - as they were not two of the poorest countries according to U.N. statistics. The participation in these countries represented a de facto policy shift in Concern. The debate reflected the remaining culture clash between the 1970s and 1980s volunteers and the others involved in the organisation. A similar change was reflected in the increased number of projects engaged in through local agencies rather than directly through international staff or volunteers.

A new policy directorate was established. This had responsibility for development education and advocacy work. It also had responsibility for the quality audit function in the organisation.

Since 1998, there was an increase in public donations - this reflected the marketing plan adopted. The objectives of this plan were:

- To increase the public profile and the prominence of Concern and present focused messages about poverty;



- To build Concern's leadership in donated income in the Republic of Ireland and N.I. and to increase the impact of the organisation's operations in England and Scotland;
- To develop new sources of income;
- To change the structure of funds from ear marked (i.e. for emergencies) to general funds;
- To harness new technology to communicate, campaign and raise funds;
- To invest in developing long term support for Concern while increasing the efficiency of fund raising
- To build public understanding of global poverty and support for action to eradicate poverty

In 1999, the Chief Executive presented a paper to the Council "Civil Society: Ireland and Overseas". This explored the idea of the development of civil society as part of the remit of an agency such as Concern. He also commented the same year that the external environment had changed since 1994 when the last formal policy review had taken place in the organisation. He stated that the organisation had no formal vision or mission statement. The Council delegated the task of looking at the issue to the Evaluation and Monitoring Committee. Following the recommendation of the Evaluation and Monitoring Subcommittee, the Council agreed that a major review of organisation policy should take place in 2000. This would include the development of a vision and mission statement, and the development of a range of resource, advocacy and programme policies. There would be a meeting of managers and field directors from overseas in addition to the senior management and members of the Council to consider the policy.

A Policy Review Committee was established and a procedure involving a consultation was agreed. However, during the course of the following year some comments were made at Council regarding the process of development of a mission statement being a waste of time. This again reflected a culture clash in the organisation. By the autumn of 2000, and before the review seminar, the Chief Executive had ensured that such a statement was agreed. In the end, this caused little controversy. The policy seminar was held in the autumn of 2000,

with Council, field directors and management present. The purposes of the event included and achieved:

- Information exchange;
- An opportunity for reflection;
- An opportunity to contribute to policy development;
- The opportunity to develop relationships between the diverse groupings in the organisation.

Whilst some in the organisation, were critical of the innovative quality of the output of the event, the event was notable for the open discussion that took place between disparate organisational groupings. Genuine engagement in a process of reflection was evident in the discussions that took place - noting that this process was not a developed cultural norm within the organisation and the destructive conflict that had been experienced in the recent past.

The Chairperson, elected in 1999, envisaged continuing to work in emergencies world wide whilst also targeting people in extreme poverty. He stated that it was important to keep informed of the views and perspectives of various major funders. He noted that increased professionalism was being forced by funders too - and altering the manner in which the organisation worked. He believed that the organisation needed to be pragmatic in terms of the methodology it employed overseas.

Overseas management was restructured based on three geographical regions - rather than on an emergency and development basis as had been the case previously. Each region had responsibility for emergency and development work within its area of remit.

In terms of change within the organisation, the area of membership was the source of greatest level of disagreement exists in the organisation. Differences of opinion were apparent between the previous and current Chairpersons, and the Chief Executive. This was in terms of how and to whom the membership should be opened, what structures should be adopted and the resources implications of these decisions. Part of the

disagreement seemed to be influenced by the vision held of the organisation - whether this was dominated by the past and current realities, or by the likely future environment. It may also have been related to the purpose of the membership that was perceived by the various parties - whether this was related only to the governance process or whether it related to the membership being the organisation 'on the ground'. The Chief Executive resigned in 2001 - this issue remained unresolved.

### **Communication, conflict / difference management, participation styles and roles**

The new Chief Executive described during interview his experiences of staff meetings when he took over the role. Nobody talked. People sat around a table. The meetings were large because they included all the senior and middle level staff. There was a pattern of a person attending with his or her line manager. That person would throw into the meeting what was described as 'a hand grenade'. Somebody else from middle level would throw in another. The key players, the senior staff members, would just sit back and do nothing. There was a poisonous atmosphere. The Chief Executive observed that from the perspective of 2000, that had changed. In comparison, the management team was very relaxed. Arguments still occurred but they were not directed personally.

When the strategic plan and new management structure were introduced, the Chief Executive stated that the structures proposed represented a means to an end - not an end in itself. The most important thing was the attitude of the people who worked in the organisation. Information should be seen as common property and that the structures should assist everyone to talk to each other. The strategy included principles on which decisions should be made. It included a section on organisational learning.

The Chief Executive said that within the strategic planning process, he had tried to be inclusive. He set up working groups looking at different questions. He received feedback, distilled the responses and finalised the document. He recognised at the time that he would not be able to engage in developing a vision statement. This was because it would have required a review of policy. The people in the organisation would not have been able to engage as they remained traumatised by their recent conflictual experiences in the

organisation, he believed. With the easing of organisational and personal tensions, that became possible subsequently.

In 1998, the Chief Executive reported to Council that he was concerned about the poor level of morale among staff. There was also a high turnover of staff. A report on staff retention was commissioned from external consultants. It aimed to establish, given the limited resources of Concern, how the organisation could achieve better staff retention. Staff turn over was running at 26% annually. Communications in the organisation were identified as one issue. Implicitly, the Chief Executive felt, that this meant that staff felt that no one communicated because no one ever told any body anything from the top down. Yet, he felt the organisation was an extremely effective rumour mill. He stated

“Its not we never communicate. Now a lot of the time people don't communicate what we want to hear...But if you could find ways of really relaxing - lighten up, when I started that was my mantra”.

The staff turn over impacted on a number of areas, one being the knowledge held within the organisation. The Chief Executive also observed that it was hard to predict what people tell to others because of differences in personality. He believed that some people believed knowledge was power and used it to bolster their own position. He wanted to try and encourage open exchange of information. One way to attempt this was by providing opportunities for dialogue - enabling people to go away and say ‘ what are we doing, what are we learning, what are the issues of the day’. He felt mentoring systems might be another option.

The Chief Executive felt knowledge transfer was facilitated by face-to-face meetings between people. If it were possible to reduce the turnover in human resources, in many ways it would be possible to reduce and capture a lot more knowledge and keep it. He stated that he believed that there was a need to have positive and trusting relationships in the context of a relaxed organisation for those processes to work. Past conflicts and political dynamics interfered with that.

Communication with the membership tended to be one way - from Head Office down. Members received only one mailing per year, and that related to the A.G.M. The A.G.M.

was usually the only organisational event the members were formally invited to year to year. Members of Council received four mailings a year related to meetings of Council. Few attended the A.G.M. so the overall level of participation appeared very low. When a social event was arranged in 2000, however, there was a very high turn out. This was a reunion, focusing again on the strong communal ties among particular groups of returned volunteers.

It was observed by the Director of Marketing and Communications that the Chief Executive's communication style was enabling if the person was able to engage with it. He held strong views. He would look for plans and then let people implement them. It was observed that not all people felt comfortable with the approach. Some felt threatened by it. The Chief Executive was also described as being reflective and cerebral in his approach.

The Chairperson described the style as follows. The new Chief Executive

“ coming on board was very important in getting some focus, a handle on the organisation, putting some discipline into the management structures. Trying to deal with the unease within the organisation, within the management team... I think he experienced quite a lot of difficulty in his first eighteen months here in kicking this organisation into a common sense of purpose and a way of moving forward. I think he did it partly by persuasion, partly by his force of personality, partly by discussion but also by indicating that he had a clear view of where the organisation was going and more or less indicating that this is it. We are not going to reopen this again. The strategic plan is the way we are going forward.

I think the culmination, if you like, in the change in the organisation, and in the professionalisation of the management, came about in that conference in the autumn. My understanding is that there was a certain degree of inevitable scepticism among the management and particularly among the field directors about the direction and so on. I think the feedback that I heard, from the Chief Executive's personal point of view, I think that a very important outcome was that he came out of that as the undisputed leader and I think that anybody who was semi-detached within the management team and within the next lower level down, now has moved fully behind his leadership and with a clearer sense of where the organisation is going.

I don't think the organisation would have survived the travail that was going on in the mid 1990s if it hadn't been for the efforts of the former Chairperson and also, frankly, the change of management style within the organisation as exemplified by the Chief Executive”.

The Director of Marketing in 2001 observed in relation to the Chief Executive's approach to conflict in the organisation that he

“... kind of hit things head on. He first assured people that they had a future in the organisation so they didn't feel they were going to loose their jobs at any moment. And then [he] hit things on the head. He is very visible, very transparent in his way of dealing, way of operating, I think. He is up front and honest with people.

Conflict often happens when people are unsure that there is a hidden agenda, or don't know what is going on. So I think his approach has been to address the issues that are there and to talk them through with people. Even when what he had to say was not what they wanted to hear, he has said it, he has been honest about where he stood. People have known. Then they can make the personal choice 'well this is where he is going, this is what he believes. I don't believe in that. I don't belong here'. Not that many people have done that. But it certainly came across to me. We had a policy review in September...he very clearly stated where he saw the organisation going, how he saw the organisation developing. He gave the message to all the people who were in a position to make it happen. Told them what change he wanted to see. There was no messing about. It was clear. It couldn't have been any clearer.

So I think a lot of conflict was avoided by that. Conflict in the organisation tends to be about the reluctance that people have to move on as he has demanded or directed. The people who have the difficulty mightn't necessarily go and try and address it. He would welcome them, welcome people coming and talking to them about it. It shows a fundamental weakness in some people. They would rather meet in clusters and talk in clusters about how they feel about something and get themselves all upset and upset other people who have found change difficult and create trauma rather than deal with the issue head on...

Its a legacy from the past. Not an adversarial approach to conflict. I think part of it would be that people would see him as formidable. They probably wouldn't dare...he's not, he is formidable but he is not, he is the most open person I have ever worked with when it comes down to discussing things...he has strong views on things but equally he is willing to listen...I think it probably goes back to the culture, how things have been done in the organisation over a number of years."

The Chief Executive reflected on the situation in the organisation. He stated that the old divisions still existed in the organisation to some extent. They would surface and they would interfere with the achievement of full effectiveness. But they had changed a lot. There was less argument about whether the organisation needed to attune itself to the broader sector. There was more argument about 'how' rather than 'what' should be done.

The Chief Executive referred to a description of a not for profit organisation being dominated by political behaviours. He stated that if people were working in Concern in a way that they were just concerned about being paid, he believed life would be much easier. He felt, however, that because there were battles going on between key players, each key player had his or her constituency. Other peoples' fortunes were hooked to this or that star. If one belonged to one person's area and another to another, even though both might get on, they would have to be terribly careful or they would get into "deep trouble".

**Output: The relationship between formal organisational change processes, patterns of participation in the organisational strategy cycle and organisational learning capacity**

Between 1997-2000, there was increased meaningful participation of Council and staff within the strategy development / formal processes / structures of the organisation in an increasingly non-adversarial climate. There were the beginnings of the development of trusting relationships among some groups.

The development of evaluation mechanisms 'in the field' began to enable the participation of target groups and local staff. Change has occurred.

Non-participation related to the public donor support base of the organisation in Ireland and the general membership continued, that is to say those not involved at Council level. This under or non-participation can be understood in terms of the development of the organisation's culture over time. The composition of the membership was largely determined and delimited by it.

The level of engagement of the general membership remained relatively inactive. Communication tended to be limited and in one direction - from the centre down. A strategy to improve this was adopted and was implemented, albeit slowly largely due to human resourcing and I.T. issues.

This indicates that the organisational culture precluded the participation of groups with different profiles in the strategy development process and other formal organisational processes / structures. This suggests that the organisation still did not have sufficient sources of environmental feedback and reflection in its strategy development and implementation processes. This indicates an organisational learning and environmental scanning dysfunction.

It should be stated that the Chief Executive's intention was to extend the membership, and to increase the level of engagement of the general membership. This remained, however,

an area of internal contention. A strategy was adopted which ultimately would result in an extended and more engaged membership if effectively implemented.

The organisation's response to the participation difficulties enabled greater participation of the membership involved at Council level in the formal processes / structures of the organisation. The nature of the engagement between and within the staff and Council also became more constructive and strategic. This was enabled primarily by the new leadership at the staff and volunteer apex of the organisation. All had alternative cultural norms, at least to some degree, to the dominant culture in the organisation. In particular, these related to conflict and difference management, strategic thinking, and vision statement. They all also appeared to have a greater awareness of the changing environment and the threats this posed to the organisation. All three also had significant managerial and organisational experience, and had strong analytical skills.



## **Analysis**

It is suggested, therefore, that during the course of Concern's history the following factors impacted on the learning capacities, the participation opportunities within the organisation, and its strategic change capability.

The organisation had a tradition of strong centralised leadership and authority. The strong, informal and cohesive friendship network that dominated for the first two decades of the organisation's life enabled this. Its shared culture was largely action focused and reactive in orientation. A strong concept of the mission of the organisation was shared informally. The operation of power in the organisation was, therefore, largely based on informal influence and networks.

As a result of this, the organisation's strategy development structures / processes / procedures remained underdeveloped. This was also the case in relation to the development of approaches to conflict management and reflection opportunities and skills. The high levels of uniformity and conformity also meant that the organisation was insulated from changes in the environment, as its capacity to perceive them was limited. A single, unchallenged 'world view' dominated.

When dissonance internally and major challenges externally reached a point where they could no longer be avoided, the organisation was unable to cope. Challenges and alternative perspectives were treated as threats. Few within the dominant coalition were ready for change. Conflict became personalised and destructive. The climate was highly politicised with various actors vying for power and influence and attempting to undermine their perceived opponents. The organisation began to fragment.

There was no uniformity of vision for the future or plan. The focus was completely on the current realities, crisis, in which the organisation found itself. The democratic structures and procedures in the organisation reflected the culture that had developed within it. This was with one exception. They allowed the election of two chairpersons from the mid 1990s onwards who did not share all the norms of the culture of the organisation. Their Council

membership had originally resulted from co-option rather than from the traditional channel of membership recruitment. Their election allowed the organisation to take some remedial strategic action. This was further facilitated by the appointment of a new Chief Executive with similar alternative norms of participation related to conflict / difference management, communication and strategic thinking / reflection.

The alternative cultural norms related to conflict management, communication, strategic thinking, reflection and approach to power / authority. It became possible to build a degree of common vision and approach to the future, though some levels of dissonance remained largely related to the former dominant group. There was increased engagement in reflection and relationship building among various groups. This aided the rescue of the organisation from the downward spiral of destruction on which it had embarked. It should be noted, however, that the ability of the new leadership at the volunteer and staff apex of the organisation to bring about change was probably enabled by the culture of strong, centralised leadership within Concern.

It can be seen, therefore, how learning dysfunction developed during the course of the organisation's evolution, impacting on its ability to anticipate the need for strategic change, and undertake such change, in a timely fashion.

In terms of the study's hypotheses and research questions, the following can be said of Concern.

The under or non-participation of certain groups of members in Concern can be understood as a symptom of an organisational (system) learning dysfunction. The low levels of diversity among the participating membership impacted on the organisation's learning and strategic change capabilities.

The process by which the organisation culture in Concern was established and maintained provides an explanation for the existence and perpetuation of such participation difficulties

and learning dysfunction within the organisation. This related to the impact of the organisational culture on enabling a diversity of membership to participate.

The successful organisational initiative which began to address these participation and learning difficulties within Concern had as its focus change at a systemic organisational level rather than at a non / under participating individual member or group level only.

The change initiative addressed the effects of organisational culture on how and when the Council membership and staff were involved in the organisational strategy development cycle particularly through its impact on:

- Communication;
- Management of internal conflict / difference;
- Organisational leadership and membership roles.

It had not addressed the same issues in terms of the general membership at the time of undertaking this study. This area remained contentious among the leadership of the organisation.

Specific and congruent arrangements for the management of systemic change, and a timeframe for its completion, through the definition of the period of operation of the strategic plan, were put in place by the organisation.

In addition to increasing effective membership participation, this change initiative increased the learning and innovative capacities of this non-profit, democratically structured organisation.

## **Chapter Eight: Analytical Overview**

Each of the case study organisations has been described and analysed individually utilising the Input Output Analytical Model proposed in this research. This was in order to enable:

- The identification of the development of the patterns of membership participation, organisational learning capacity and strategic change capability in each organisations impacting on the effective achievement of the organisational mission in the context of environmental challenges;
- The inter-dynamics between each of these - a systemic approach;
- Patterns matching between these and the study's theoretical framework - explanation building.

The purpose of this chapter is to provide an analytical overview of the case studies in the context of the theoretical perspectives outlined in the Literature Review and in consideration of the hypotheses and research questions suggested there and in chapter one. This takes two forms. This first reviews the case study analysis arrived at through the utilisation of the Input Output Analytical Model - allowing for the development of a systemic analysis based on a system of pattern matching resulting from the structuring of the theoretical framework / hypotheses in the form of the model. The second approach involves the matching of particular organisational experiences in each organisation with particular aspects of the theoretical framework. The reason for undertaking the second approach is to further ground the findings of the study in the theoretical framework, ensuring the representivity and replicability of the study.

The chapter is structured as follows:

- A brief review of the analysis of each of the case studies (involving approach one above)
- A discussion of the findings in the context of the theoretical framework proposed (approach two above)
- An analysis of the data in terms of the hypotheses.

## **A brief review of the analysis of each case study**

### *The National Youth Federation*

In the review of the development of the National Youth Federation, the key issues that emerged in terms of the relationship between membership participation, organisational learning and strategic change, and therefore the effectiveness in meeting the organisation's mission and its response to environmental challenges, are the following.

The culture of leadership at the apex of the organisation, and at the apex of the regional member organisations, emphasised centralised authority and control. This had consequent implications for the development of a sense of ownership of the organisation among other groups. It also had implications for the management methodology that was applied to, and the roles assumed by, other organisation actors. During the second period reviewed (Input Output Model Part 2), the mission of the organisation and the philosophical basis for this evolved such that it was in conflict with the established, unspoken, culture of leadership and use of power. Subsequently, both operated in tandem resulting in, what appeared to be, a culture clash in espoused theory and theory in use within the organisation - particularly at very senior levels. As time passed, there was an increasing absorption with the current internal realities facing the organisation rather than its future vision and development in the context of its likely external environment. As such it became 'insulated' from environmental challenges it faced.

This situation resulted in an increasing use of informal power and influence and non-organisationally strategic political behaviours. This influenced the norms of behaviour in relation to conflict and difference management and communication. It encouraged a fear of participation in formal processes and structures among some groups, and the increasing influence of informal friendship and other networks - often controlling key resources in the organisation.

Ultimately, the representative structures were weakened. This related to the lack of cohesion among members of the Board at national level, and the patterns of participation of National Office staff. There was a lack of commonly held vision of the organisation and of

the future. The levels of engagement in the strategy processes were reduced, as were the quantity and quality of sources of environmental information and reflection. The operation of the democratic processes and structures in the organisation reflected this situation and culture. They did not act as a balance to it.

The change strategy adopted in the final period sought to address these issues. The levels of success it achieved can be attributed to the cultural boundary spanning capacity of the Chief Executive of the time (Input Output Analytical Model Part 3). The timing of the change project, and its resourcing, however, had implications for its ultimate success and the survival of the organisation. This was such that by the time the organisation embarked on an effective change strategy, it may have been too late in terms of responding to the environmental challenges it faced. This reflects the preoccupation with current rather than likely future realities that developed at an early stage – a lack of vision and effective environmental scanning.

It may be suggested that this situation can be attributed to the insulating effect of the dominant organisational culture, particularly in relation to the participation and relational behaviour norms of senior leadership and their impact on general participation in the strategy cycle. This caused a serious learning dysfunction within the organisation impacting on its ability to engage in strategic change in a timely fashion in order to effectively carry out its mission in the context of severe environmental challenges - for example in the context of new legislation changing funding arrangements and creating greater competition in the provision of local and regional youth services among youth work service organisations..

#### *The Irish National Teachers' Organisation*

It is suggested that within the I.N.T.O. the dominant organisational culture precluded the participation of groups with alternative profiles and cultural norms to that of the dominant coalition in the organisation in terms of communal processes of environmental scanning, analysis and envisioning. This was in terms of their participation in the strategy and other formal processes and structures in the organisation. This led to a level of environmental

insulation among activists and leadership and the under development of organisational processes to enable effective environmental scanning, reflection, decision -making and implementation.

The key factors impacting on the learning, and therefore the strategic change, capability of the I.N.T.O. were the following. One set of cultural values and norms of behaviour completely dominated the organisation. These became highly institutionalised in the structures, rules and procedures of the organisation in addition to the informal norms of behaviour. This resulted in a paternalistic culture where the general membership was passive in their engagement with the I.N.T.O. This created a situation where the leadership / activist groups became insulated from divergent perspectives, experiences and sources of information and reflection. In general, the need for internal change was therefore unrecognised among the dominant activist group. This was even in the face of external expert input identifying the need for this. When internal demands for change arose, reflecting environmental challenges faced by the organisation, it was interpreted as a threat to the power and influence of the leadership / activist groups.

The democratic structures reflected the culture of the dominant coalition and therefore enabled its participation. They did not act as a balancing opportunity in terms of membership participation. When the profile of those participating in the representative structures altered, the culture of those structures / regulations / rules remained the same - thus ensuring the exclusion of diverse perspectives.

Within an increasingly complex external environment, the need for the organisation to change also increased. The strains in the culture of the organisation became apparent at this point as the relationship gap between the general membership and the leadership widened. This was evident in the nature of discussion and adversarial conflict, and increased levels of non-participation, in the various structures of the organisation. This was to the extent that the power of the organisation began to be undermined because it was unable to respond effectively to significant challenges within its environment - for example in relation to the

offering of I.N.T.O membership to child care assistants working with teachers in class room settings.

This was a result of the I.N.T.O. being unable to recognise the need for the required internal change at an appropriate time, to create a sense of readiness for and ownership of change among the membership and activists, and to institute a properly resourced, managed, system wide, change strategy. It represented a significant learning dysfunction impacting on the strategic change capabilities of the organisation.

### *Concern Worldwide*

During the course of Concern's history, it can be suggested that the following factors impacted on the organisation's learning capacities, the participation opportunities within it, and its strategic change capability.

The organisation had a tradition of strong centralised leadership and authority. The strong, informal and cohesive friendship network that dominated for the first two decades of the organisation's life enabled this. Its shared culture was largely action focused and reactive in orientation. A strong concept of the mission of the organisation was shared informally. The operation of power in the organisation was, therefore, largely based on informal influence and networks.

As a result of this, the organisation's strategy development structures / processes / procedures remained underdeveloped. This was also the case in relation to the development of approaches to conflict management and reflection opportunities and skills. The high levels of uniformity and conformity also meant that the organisation was insulated from changes in the external environment, as its capacity to perceive them was limited. A single, unchallenged 'world view' dominated.

When dissonance internally and major challenges externally reached a point where they could no longer be avoided, the organisation was unable to cope. Challenges and alternative perspectives were treated as threats. Few within the dominant coalition were



ready for change. Conflict became highly personalised and destructive. The climate was highly politicised with various actors vying for power and influence and attempting to undermine their perceived opponents / sources of competition. The organisation began to fragment and remained unable to respond to the major external environmental challenges it faced - for example in the wake of the Rwandan crisis.

There was no uniformity of vision for the future or plan. The focus was completely on the current realities, crisis, in which the organisation found itself. The democratic structures and procedures in the organisation reflected the culture that had developed within it. This was with one exception. They allowed the election of two chairpersons from the mid-1990s onwards who did not share all the norms of the culture of the organisation. Their Council membership had originally resulted from co-optation rather than from the traditional channel of membership recruitment. Their election allowed the organisation to take some remedial strategic action. This was further facilitated by the appointment of a new Chief Executive with similar alternative norms of participation related to conflict / difference management, communication, strategic thinking / reflection and the use of power and authority.

It became possible to build a degree of common vision and approach to the future, though some levels of dissension remained largely related to the former dominant group. There was increased engagement in reflection and relationship building among various groups. This aided the rescue of the organisation from the downward spiral of destruction on which it had embarked. It should be noted, however, that the ability of the new leadership at the volunteer and staff apex of the organisation to bring about change was enabled by the culture of strong, centralised leadership within Concern.

It can be seen, therefore, how a learning dysfunction developed during the course of the organisation's evolution. This impacted on its ability to anticipate the need for strategic change, and undertake such change, in a timely fashion in order to effectively achieve its mission in the context of severe environmental challenges.

## **Discussion**

### ***Organisational Culture and Its Impact***

The evidence of the three case studies indicated that the beliefs and expectations shared by organisational members powerfully shaped the manner in which they participated. This confirms the literature relating to the experience in other forms of organisation (Schwartz and Davis 1981, Deal and Kennedy 1982, Van Maanan and Barley 1989, O'Reilly 1989, Mezirow 1991).

Pascale (1989) distinguished between two sets of cultural norms. The first he described as the core factors that drive a business towards success and the second related to social conventions signalling commitment and belonging. He suggested that the former were the more essential as they ensured consistency related to strategically important activities. This study, however, demonstrates that, in the organisations studied, the latter types of norms were of particular significance in terms of the development of organisationally strategic learning capabilities ( i.e the integrated strategic-learning tasks of action, reflection, conclusion drawing / decision making and testing). This was because they related to the behaviours that enabled involvement and a sense of belonging. In turn these, therefore, excluded those who did not share these cultural norms. These related to a certain set of experiences in society and ways of looking at and participating in 'the world'. The formal structures and processes that developed reflected these norms of behaviour and understanding.

These norms encouraged the entrenchment of organisational cultures based on limited sets of experiences, norms, expectations and worldviews - this relates to the earlier work of Breathnach (1996) and that of Druskat and Wolff (2001). The organisational cultures became, in this way, the primary systems of control determining the direction and co-ordination of activities (Wilkins and Ouchi 1983). The impact of these entrenched cultural norms of participation and interaction - communication, conflict and difference management, participation roles and styles - was detrimental to the environmental scanning capabilities of the three case study organisations. This resulted in each of the case study organisations developing strategically significant organisational learning dysfunction

during the course of the histories, impacting on organisational effectiveness in achieving the organisational mission in the context of significant environmental challenges.

As has been suggested in the literature, structures and procedures were adopted based on these cultural norms. In this way, the power and influence of those who shared the dominant culture were 'institutionalised', confirming Salancik and Pfeffer (1977) findings but applying them in a new organisational domain. These formal and informal processes and structures designated what activities were undertaken by the organisations studied, and how they were undertaken, and what alternatives were considered in terms of the environmental challenges which existed.

This included the gathering and interpretation of data through the establishment of committees and consultation with particular groups formally and informally, directly and indirectly. These reported to designated people / groups. Others were excluded from the loop. Therefore, those with the greatest power in the organisation, or more closely connected to those in positions of power, were in the strongest positions to interpret information, particularly related to the organisations' environment but also in relation to the patterns of participation of the membership of the organisations internally. They had the power to frame the agenda in the three organisations reviewed. This in turn increased the level of insulation of the organisations from their changing external environments and from dissonant voices within the organisations themselves. This reflects the work of Thompson (1980), Lyle and Mitroff (1980), Dutton and Jackson (1987), Thompson and McDaniel (1990), Mezirow (1991), Coghlan and Brannick (2001) related to other organisational sectors.

Thomas et al (1990) found that the information processing capacity of the senior management team was a significant factor in enabling it to perceive issues as organisationally strategic (responding to the effective achievement of mission and environmental challenges) rather than 'political'. In this instance this term was interpreted as meaning dissonance as a threat to power, resources or influence. Janis (1982) found that when a dominant coalition is able to interpret events in this way everything will be

incorporated into the traditional / dominant ways of thinking within an organisation. As a number of commentators have found (Korber and Kluckholm 1952, Freire 1971, Salancik and Pfeffer 1977, Ouchi 1981, Siltenan and Stanworth 1984, Feldman 1984, O'Reilly 1989, Pascale 1989, Senge 1990, Thomas et al 1990, Coombs et al 1992, Keher 1993, Coyle 1995, Breathnach 1996), a problem for the organisation arises, if, as part of this process of the institutionalising of power and culture, opposition or divergent voices are designed out of it. This means that the interpretation of the dominant group remains unquestioned. The organisation becomes out of touch with its environment and its survival is threatened ultimately. As suggested above, this process was observed in the three case study organisations.

Similarly, Nadler and Tushman's (1986) comments also find a resonance in the experience of these organisations when they stated that as organisations grow and become more successful, they develop internal pressures for stability - to avoid change. Organisational structures and systems become so inter linked that they only allow compatible changes. This was particularly evident in the case of the I.N.T.O. in the attempt to achieve greater balance in gender participation patterns and in the attempt to extend membership to child care assistants.

The authors mentioned above continued by suggesting that over time members of the organisation develop a sense of competence in knowing how to get work done within the system. These reinforcing norms and patterns of behaviour contribute to increased organisational stability, and to a sense of organisational history. This is useful to the organisation as long as the organisation's strategy is appropriate in terms of its environment. However, if it is inappropriate, the corporate culture can be an obstacle to organisational effectiveness and competitiveness. It may not be able to recognise a threat due to complacency, stunted external vigilance, concern with perceived current realities rather than future envisioning, and the maintenance of the status quo (Salancik and Pfeffer 1977, Nadler and Tushman 1986, Kanter 1988, Thomas et al 1990, Kiernan 1993, Du Toit 1998, Gilchrist 1998, Garratt 2000). Again, this pattern was evident in the I.N.T.O.,

Concern Worldwide and the N.Y.F. The role played by senior organisational leadership over time in each case was found to be of particular significance in this respect.

The organisation, Nadler and Tushman (1986) suggested, will often conform rigidly to the way it has always operated, even making an increased commitment to this, in the face of major challenges due to the manner in which it perceives them. This occurred in all the organisations studied, particularly in the I.N.T.O. and Concern Worldwide. This was even though external consultants commissioned by the organisations had, in both cases, reported on the challenges and the need for change. Kiernan (1993) described this as a type of blindness to the requirements for success, among organisation activists. It essentially creates learning dysfunction through reducing the capacity of the organisation to gather and reflect on evidence which might contradict the dominant approach - this activity occurred very clearly during the 1989-1997 period in the N.Y.F. Of particular interest here is the manner in which the organisational culture enabled reversion to a highly centralised view of and approach to controlling authority. It also occurred, however, in the other organisations, particularly in their ability to interpret environmental information. Kanter (1988) refers to this approach as 'insulated leadership'.

During the course of the case study organisations' histories, change was attempted and difficulties were encountered. In a number of instances, this appears to have been as a result of a clash of espoused theory and theory in use (Argyris 1991, 1999) within them, and that these, in turn, related to clashes of cultural norms and values. Examples of this included the establishment of the Equality Committee in the I.N.T.O. and the attempt to establish the constituent bodies within the N.Y.F., and in attempts to develop a strategic approach in Concern Worldwide during the early 1990s.

The resistance that was experienced can be interpreted as resistance to the underlying values in the espoused theory in the organisation - but in concert with those of the theory in use amongst those most active, or those with high levels of power. The failure of these change initiatives might be interpreted, as Dornbush and Scott (1975) have suggested,

as an over-reliance on the formal system and a failure to shape culture dynamics in the change initiative.

A lack of understanding regarding this type of dynamic may have led to the demotivation experienced by the I.N.T.O. Equality Committee and those actively supporting the establishment of the constituent bodies in the N.Y.F. - in attempting to bring about structural and procedural change in keeping with the organisations' stated policies responding to environmental challenges and new realities. The norms and resulting attitudes and behaviours of a culture can often be implicit rather than explicit. As Krober and Kluckholm (1952) and Frieire (1971) observed this may particularly be the case for those elements of culture which have been inherited. To understand it, one has to share or hold a deep understanding of the culture in question - to almost be 'born' into it.

The effectiveness of such cultural systems of control is dependent on the strength of the culture. Feldman (1984), it has been noted, suggested that such cultures only exist when there is both intensity and consensus in relation to the cultural values and norms. These have to be reinforced and valued. Pascale (1989) stated that when there is inconsistency between what is said and done, particularly by those in authority, the culture will be undermined and weakened. It can result in cynicism and confusion. In such a context, he suggested that social roles are unclear, nobody speaks the same language and as a result communication and trust breaks down within the organisation.

It can be suggested that this occurred in all three of the case studies. For example, this was apparent during the incorporation process and the procedure for re-admittance to membership under the new Membership Charter in the N.Y.F. It was also evident at the end of the 1990s, in the lack of cohesion amongst the members of the national Board of the N.Y.F. It was apparent during the recent national debates and ballots in the I.N.T.O. and during the early 1990s in Concern when the organisation faced huge challenges within its external environment following the Rwandan crisis in particular. All three of the organisations were experiencing increasingly complex external environments. The result

for many in the organisations was increased non-participation, and destructive inter-personal conflict and defensive behaviour

Within each of the organisations studied, at various points in time, it appeared that activists in each did not agree on what the organisation should do or how it should do it. In the absence of effective, communal reflective processes, this resulted in high levels of destructive, adversarial conflict and narrowly political, non-strategic behaviours - insulated from the external challenges the organisations were facing. A number of commentators described this process (Salancik and Pfeffer 1977, Senge 1990, Thomas et al 1990, Coombs et al 1992, Breathnach 1996) as a situation where there is no clear criteria for making decisions or resolving conflicts of interests. The only means for doing so, they suggested, is the use of social, informal processes like power, status or social ties /informal influence networks. These impact on the effectiveness of organisational decision making and strategic thinking - the effective achievement of the organisation's mission and response to environmental challenges. They have suggested that under these conditions, the dominant individual or group will win their position due to the degree of control possessed over scarce resources, favours and rewards, punishments and networks. Opposition or diversity of perspective will not be strong because of this situation. Ultimately, they observed, this results in an ineffective organisation. Nadler and Tushman (1986), Kanter (1988), Thomas et al (1990), Kiernan (1992), Du Toit (1998), Gilchrist (1998), Garratt (2000) have all confirmed this in their work in types of organisational contexts other than that under review here.

This process was observed in all of the case studies. For example, this occurred in the N.Y.F. with the dismantling of the constituent bodies and the treatment of staff. In Concern, it related to the late 1980s / early 1990s and during the late 1990s in the I.N.T.O. In all instances, this meant that when the organisations needed to be able to adapt to a changing external environment rapidly, they were not in a position do to so. This was because of the impact of destructive conflict on organisational participants, the lack of readiness for change this caused and related skill shortages. This appears to have been as a result of, at least to some extent, an over concern in the past with the maintenance of the

status quo in terms of the location of power and control over scarce resources, reflecting an over concern with current realities internally rather than future environmental envisioning.

A review of the literature suggests, therefore, that a senior management team that is diverse in background or perspective, and that is open to new information from a variety of sources, but which has a strong group identity, is likely to be the most useful to an organisation in strategic development terms (Salancik and Pfeffer 1977, Nadler and Tushman 1986, Kanter 1988, Thomas et al 1990, Kiernan 1992, Du Toit 1998, Gilchrist 1998, Garratt 2000). This relates to the diversity of information exchange and reflection, and the methods through which conflict is used as a source of constructive contention, the encouragement of communal understanding and team working.

It can be seen that in the penultimate period under review in the case studies (Input Output Analytical Model Part 2: Output), almost the opposite had developed in each case, with, as mentioned above, the anticipated results. During the final period, these issues were addressed to some degree in the N.Y.F. and Concern. The I.N.T.O. had yet to deal with this issue (Input Output Analytical Model Part 3: Output).

### *Organisational Structure*

As has been noted earlier in the study, collectives form to accomplish complex tasks (Argyris and Schon 1978, Simon 1981, Dixon 1994, Grant 1996, Argyris 1999). The organisational task system adopted is a pattern of interconnected roles that are both a design for work and a division of labour. They, therefore, reflect the culture of the dominant coalition. Organisations can be seen to exist because they can create the conditions under which multiple individuals can create their specialist knowledge (Grant 1996). A group of people become an organisation when they develop processes for making decisions in the name of the collective, delegating to individuals authority to act for the collective, and setting boundaries between the collective and the rest of the world (Argyris and Schon 1978, Argyris 1999). The purpose of the organisation is to enable co-ordination and co-operation - not internal competition - in the effective achievement of the organisation's mission and response to environmental challenges.



Grant (1996) created a framework identifying four mechanisms for the integration of specialist knowledge within an organisation. It appears that historically in Concern the dominant approach to doing this was through the use of 'routines'. That is to suggest the use of 'grammars of action' (Pentland et al 1994) that are triggered by a relatively small number of signals or choices. These are recognisable but in a relatively automatic fashion. However, in attempting to come to grips with the difficulties faced by the organisation due to new environmental conditions, there appears to have been an increasing use of group problem solving and decision making at staff and Council levels. Within this approach, there is a reliance on high interaction and non-standardised co-ordination mechanisms that increase with complexity (Perrow 1976) and uncertainty (Galbraith 1973). In the face of extreme environmental conditions, this reflects the redundancy of much of the established culture in Concern on which its 'routines' were dependent (Grant 1996).

The N.Y.F. used a combination of rules and directives - as implied through the use of representative structures. These are used, it has been suggested in the literature, because they are felt to be impersonal and to create standards to regulate interaction. Grant (1996) suggested that this is a low cost method of communicating between specialists and large numbers of either non-specialists or specialists in other fields.

There were two notable exceptions to this in the N.Y.F., however, where an almost opposite approach was used. These involved the use of group problem solving and decision making. This occurred within the N.Y.F. during the 1970s when a heavy emphasis was placed on the use of group work. This approach continued during the 1980s but its effect was reduced due to the increasing impact of informal networks and narrowly political behaviours at senior levels. This resulted from an over concern with current internal realities and a lack of effective future environmental envisioning relating to a strategic deficiency at senior leadership levels. Similarly, in the final period of the history of the N.Y.F. reviewed (Input Output Model Part 3), in the context of the active dismantling of much of the representative structure in the organisation, this method was again used. The effectiveness of the use of group work in the N.Y.F. was related to the

strategic context (organisational learning context) and degree of future environmental envisioning within which it was utilised

The dominant formal approach adopted by the I.N.T.O. was 'rules and directives'. Within the I.N.T.O., rules were used to keep various groups separated from direct interaction. It focused intra-group communication on elected representatives or officials. Grant (1996) among others (Jago and Vroom 1988, Tsjolvold 1995, Druskat and Wolff 2001), however, observed the difficulties in using this method related to communicating tacit knowledge, particularly associated with divergent cultures. He suggested that this encouraged organisations to maximise the use of rules, routines and other mechanisms in the interests of efficiency. In the case of the INTO, however, the efficiency appears to have been at the expense of effectiveness. The processes used contributed to the insulation of various groups in the organisation from coming in contact with diverse sources of experience and perspective. These groups reflected the emerging environmental challenges for example resulting from the increased diversity in the class room population, increased expectations of the education system, gender issues and so forth. The situation undermined the ability of the I.N.T.O. to scan its environment effectively, learn and enable the readiness of organisation members. Due to the nature of the organisational culture, the method contributed to the levels of insulation experienced by the organisation and its members.

Grant (1996) observed how group problem solving and decision making is often reserved to unusual, complex and important tasks - those usually associated with the higher levels of the organisation hierarchy. This, as we have mentioned above, can have a negative impact on the organisation if those involved are drawn only from the dominant coalition within the organisation - as demonstrated by Friedlander (1984), Kanter (1988), Hamel and Prahalad (1992), Kiernan (1993), Grant (1996), Brown et al (1998), Alvesson and Karremar (2001). This appears to have been the case for much of the I.N.T.O.'s and Concern's histories, and also in the informal influence networks in operation in the N.Y.F in particular.

As Healy (1998), for example, has observed, it also must be borne in mind that the rules and routines themselves reflect a particular cultural world view and, therefore, in their

operation can inhibit effective environmental information gathering, reflection and decision making and action - they have a filtering effect. The operation of the rule bound procedures at branch level in the I.N.T.O., in particular, was an example of this.

Simon (1981) suggested that hierarchical forms of organisation have emerged as a result of the evolutionary and problem-solving advantages they provide. He suggested that it is an efficient system for co-ordinating complex systems comprising multiple socialised units. Intensity of interaction is the basis suggested for the hierarchy. At every level, interaction between the superstructure and the substructure was more intense than between the substructures. He suggested that this permitted near decomposability - the functioning of each unit maybe viewed as operating autonomously. Thompson (1976), however, suggested that hierarchies should be grouped according to, in the first instance, those individuals who were reciprocally interdependent - that is to suggest those who were co-ordinated by mutual adjustment (Thompson 1964).

Both of these approaches are based on assumptions that hierarchies are involved in the processing of forms of knowledge utilised within organisations. However, we have already seen that when managers or those in the superstructure know only part of what those in the substructures know, and cultural issues / tacit knowledge issues are not consciously addressed, such knowledge cannot be transferred upwards. Equally, this approach does not allow communal development of knowledge within an organisation. This requires joint reflection on diverse information by organisation members. This is essential if common knowledge is to be developed and a sense of joint ownership of the organisation maintained / achieved enabling the organisation to be effective in the achievement of its mission and in responding to environmental challenges. The more complex the environment and diverse the experience of the membership, the more this is a necessity. The traditional forms of hierarchy outlined above, therefore, appear to be inefficient means of co-ordination in terms of enabling organisational learning. As Grant proposed (1996), if decision making at upper levels of the hierarchy is dependent on difficult to communicate knowledge existing at lower levels, the quality of senior level decision making is impoverished.

This issue of organisational ownership emerged in two of the case studies in particular - the I.N.T.O. and the N.Y.F., although it was also apparent in Concern. The I.N.T.O. was increasingly suffering from the disengagement of members in national ballots and consultation processes. The engagement of activists became increasingly adversarial and destructively and non-strategically conflictual. This was impacting on the self-confidence of the organisation at national level and its ability to sustain its powerful position into the future in the context of an increasing demanding environment.

Within the N.Y.F., significant problems of identification with and support for the organisation had emerged among its members during the last twenty years of its existence. As a result of destructive, conflictual experiences in these fora formerly, this situation was compounded by the development of a culture of fear of participation in formal settings. This impacted on the ability of the N.Y.F. to assert its interests in the national youth work debate. It also impacted on the ability of the organisation to raise awareness among its membership of the need for change and to engage them in development processes at an appropriate point in time in the context of a rapidly changing external environment.

These issues are reflected in the discussion of Hamel and Prahalad (1992) who contended that the traditional organisational hierarchy, with its implied managerial and communication styles, has a number of relevant impacts. They suggested that the structure fosters an elitist view of management that disenfranchises most of the organisation. Organisation members fail to identify with corporate goals or involve themselves in the work of making the organisation the best it can be. They also stated that this form of organisation is associated with a lack of openness and trust between the various levels of an organisation. These effects can be observed in the case study organisations.

Hamel and Prahalad (1992) suggested that this type of situation means that strategy formulation often becomes an elitist activity, and that it is difficult to produce a creative strategy to effectively achieve its mission and respond to its environment in this context. They suggested that this occurs because insufficient points of view are included in the strategy formulation process to challenge conventional wisdom in the organisation - and

insulation from new environmental challenges. These processes, they contended, generally relate to annual planning rituals and the need for boundary spanning capabilities (Brown et al 1998, Garrat 2000). They stated that such rituals, and the absences of these capabilities, limit the horizons of discussion as they entail limited incremental action to what occurred previously. It implies that no effective environmental or future scenario scanning takes place.

This was borne out in each of the case studies. Where there was a dependence on a ritualised formal annual planning system in these three democratically structured, voluntary organisations, little strategic development occurred. These were not occasions of effective communal reflection, environmental scanning or analysis, or strategic decision making.

The nature of participation of delegates, and the general membership, was limited and low in terms of numbers attending and / or quality of input. Those in the senior staff roles of the organisations at the end of the review of each organisation (Input Output Analytical Model Part 3), believed that the annual congress or annual general meeting was ineffective as a means of moving the organisation forward. It was seen as an opportunity to get a formal decision on an issue. It required a lot of other intensive, dialogical and reflective work to be carried on previously. This was highly dependent on the senior member of staff to ensure this occurred.

In most instances, the general membership appeared to have little input into setting the organisations' agenda, and often appeared to make little connection with decisions made at these events responding to environmental changes and changes that occurred subsequently. This suggests, particularly in the case of the I.N.T.O., that the formal structures and processes of the organisation did not enable the membership to reflect on these matters, or reach a sense of joint understanding and ownership related to them. It also relates to the N.Y.F. history and was the focus of the change initiative undertaken in the organisation in the late 1990s.

It has also been suggested by a number of observers (Friedlander 1984, Kanter 1988, Hamel and Prahalad 1992, Kiernan 1993, Grant 1996, Brown et al 1998)) that hierarchy inhibits learning. It has been suggested that power differentials hinder system learning when subordinates suppress or deny their own resources and expertise, and that of superiors is imposed. It can also be affected by the distancing of the two groups for the purposes of self-protection.

In the case of the I.N.T.O., this process can largely be understood in terms of the organisational culture that traditionally helped and hindered the participation of various groups. In more recent times, the nature of the adversarial debate that took place in the traditional structures of the organisation, undermined the contribution of all involved as the aim was, apparently, to 'win' at all costs as opposed to reaching a commonly held decision based on commonly developed understandings.

In the instance of the N.Y.F., the reticence and power plays between the membership and National Office was indicative of this type of behaviour. One of the aims of dismantling most of the formal structures was to create more open opportunities to gather and reflect on information, and to do so within a developmental agenda rather than a highly formalised and regulated one which inhibited participation. In ways, Brown et al's (1998:101) observations have an interesting resonance here.

"The firm needs to work towards synergy or divest until it achieves coherence...firms are valuable exactly to the extent that ...they make communities of practice that expand their vision and achieve collective coherence ...the problem of relationships is a critical organisation feature - and one that demands significant organisational investment".

Brown et al (1998) continued by stating that the easy spread of 'knowledge' reflects suitable social contexts rather than suitable technology. They suggested that this is because people connected in this way can rely on complex networks of overlapping communities, common backgrounds and personal relationships. This echoes Kim (1993), Argyris (1999) and Habermas (1987). Brown et al (1998) stated that this aided the evaluation and propagation of experience / knowledge. This is of significance in this discussion in terms of the alternative perspectives being brought to bear in the strategic-learning tasks in the three case study organisations.

In the I.N.T.O., there was a deep concern to develop connections with members. The traditional structures of the organisation were perceived by the most senior members of staff as being largely redundant in this respect. Whilst new structures were established, their influence was limited and contact with the rest of the organisation highly restricted. To some extent at senior leadership levels, the use of new technologies was seen as a particularly useful tool in achieving connection with the membership but again it individualised the relationship with all the implications that carried.

These approaches did not enable 'overlapping communities' as Brown et al described them. If anything, they ensured the isolation and separation of members from each other, thus undermining the opportunity for developing common understandings of the environment and ownership of required developments. It, in many ways, extended the application of the traditional organisational culture in terms of power, and control. A similar pattern was evident in the introduction of the 1850 telephone help line.

In Concern, some limited initiatives were undertaken - for example, the autumn review seminar and in the establishment of the strategy development working groups. This certainly enabled the evaluation and propagation of experience of the environment and knowledge. The use of evaluation mechanisms was initiated but the distribution of learning from these was still at an early stage of development.

Within the N.Y.F., this was one of the primary purposes of the change actions that were undertaken at the end of the 1990s. The dismantling of the traditional structures and the organising of new and responsive developmental meetings in the context of policy and programme development relating to new environmental conditions, had, at its core, the desire to achieve shared understandings. It also aimed to achieve practical and strategic results from these with the support of the members. The changes had a process rather than structure focus, combining both relational and strategic / learning processes.

In this context, Brown et al identified the need for 'boundary objects' - in addition to 'translator' and brokerage roles. Boundary objects are described as being items of interest to different communities but viewed from different perspectives / interests. They enable discussion that brings the different groups to a greater understanding of each other and themselves - again echoing Habermas (1987). This provides for co-ordinated, loosely coupled systemic behaviour and encourages second loop learning (Argyris 1991, 1999).

These authors suggested that this type of approach allows for the greater development of informality between groups normally associated with intra-group situations. They believed that formal interactions that often dominate inter-group relationships are often less productive than more informal ones.

It can be suggested that the Chief Executives in Concern and N.Y.F. at the end of the period reviewed (Input Output Analytical Model Part 3) were attempting to work with this approach. The emphasis on bringing various organisation members together to discuss issues of mutual interest (related to environmental experiences and challenges) in workshop style settings seems to reflect this. These were also located at the heart of the organisations' strategic development - not at the periphery. In both instances, the Chief Executives were conscious of the need to develop relationships between various groups that heretofore had been somewhat suspicious of each other. The development of a 'relaxed' organisation was how one described it. This reflects Goleman's (2001) findings.

Central to the adoption of this approach appears to have been, however, the ability of the two senior staff members to have a deep understanding of the existing organisational cultures, and yet to be part of an alternative one based on alternative norms of behaviour. They also had clear understandings of the environmental challenges by the organisations. These related, in particular, to the relational and strategic / learning processes of communication, conflict and difference management, strategic thinking and reflection, and, indeed, approaches to leadership.



Whilst this involved them in elements of translation between one group and another, it involved more than this. It required them to be able to operate credibly in each culture, to span cultures. This appears to have been a particular aid in moving the organisations forward in a strategic manner. This also enabled the Chief Executives to engage organisation members in effective discussion of the environmental challenges faced by the organisations.

Drucker (1992) highlighted the role of the Chief Executive in enabling the Board of an organisation to operate effectively. Working effectively implied, in this instance, the enabling of the Board's and organisation's consciousness of its environment and its ability to respond - if this is not happening the Board, Drucker suggested, would often be the last to know the organisation was in trouble. This appears to have been borne out in this study, in the evolution of each of the case study organisations in their relationships with their memberships and 'need sources'.

The issue of power and its use in an organisation is clearly key to the manner in which an organisation develops. As Spender (1996) suggested, the theory of bureaucracy presupposes that all knowledge necessary to strategy and organisational design processes is available at the top of the organisation, and that this underpins its authority. When this is not the case, he suggested, and when subordinates are able to deal with uncertainties that cannot be resolved by senior management, those subordinates have power over the top management.

In the case study organisations, it was possible to observe the dynamics of much of this. For example, by the end of the 1980s in the N.Y.F. the regional officer group in particular had a significant degree of power in the organisation at the expense of the operation of the national organisation, and as was suggested, the regional membership. They had closer environmental connections and relationships at regional level. The new Chief Executive of that time addressed this matter 'head on' and to some extent reversed the situation. In doing this, however, the sense of ownership of the organisation among many of those active at regional level, and in National Office, was diminished. A culture of non-participation

grew-up in response to this, and also due to a level of fear that had been generated by the manner in which the national organisation was controlled at this time.

In Concern, the tradition in the early years was that top level, central authority made the decisions with little engagement with the membership, even elected representatives. This led to friction by the end of the 1980s between Council and Management - requiring an investigation to be carried out. When the central authority was not in a position to contend with a rapidly changing external environment, the organisation began to fragment with destructive, non-strategic and adversarial conflict becoming the norm. As a result of the reliance on the top level of bureaucracy for leadership, when this was not forthcoming the organisation was not prepared to cope as effective leadership did not exist at other levels. It was only with the election of a new Chairperson in 1994 that such leadership become available. Essential to the success of this in slowing the decline of the organisation was, again, the culture spanning capacity of the Chairperson in terms of his norms of participation and leadership in combination with his broad environmental awareness.

It might be possible to suggest that the difficulties experienced by the I.N.T.O. in the final period reviewed resulted from a similar set of difficulties causing gradual fragmentation through destructive conflict. It remains to be seen whether leadership with a cultural boundary spanning capability (particularly in terms of relational norms / norms of participation) will emerge at a sufficiently senior level to come to the aid of the organisation.

It can be seen, therefore, that the participation or relational norms underlying the culture of an organisation also have a significant influence on the development of formal organisational structures/ processes/ rules/ roles and their operation. Regardless of the espoused mission of the organisation and the philosophy of operation this suggests, it seems that the organisational culture of participation - particularly that related to leadership - had the dominant impact in the case study organisations. This again relates to Goleman's (2001) findings in the business sector.

### *Accountability, Politics and Democracy*

This discussion may have particular significance in addressing the criticisms that Coopey (1995) makes of Senge's approach to the learning organisation. Coopey criticises the absence of an explicit approach to organisational politics and the treatment of politics as a pernicious way to resolve conflict. In particular he states

"...the absence from the learning organisation model of specific features to facilitate changes in the framework and institutions of governance, and in the political processes constrained by them detracts considerably from the model's prescriptive value, especially as it effects the interests of rank and file employees" (Coopey 1995: 197).

Pedler et al (1997) referred to the resentment and disenchantment that can result in this situation. Spender (1996) also referred to the impact of political dynamics.

The experience of the case study organisations outlined above demonstrates the impact of this on the functioning of the organisations when such emotions and disenfranchising occurs. However, we have also seen that formal political processes and structures tend to reflect the culture of the organisations in their approaches to power and conflict management. They have tended in the case study organisations, it would seem, not to provide, effective mechanisms to manage conflict constructively or enable strategic development and learning.

The factors that appear to have enabled change / development in the organisations heretofore engaged in destructive cycles related to the existence of cultural boundary spanning capacity at senior leadership levels (Brown et al 1998). Such leaders held alternative norms or cultural values in relation to leadership and participation - particularly those related to reflection and strategic thinking (related to environmental challenges and the effective achievement of the organisational mission), conflict management and communication. Their approach to power was fundamentally different. This experience would tend to support Senge's (1990, 1994) approach to leadership rather than Coopey's (1995) in relation to formal representative / political structures / processes as a key element in dealing with the problems Coopey identified.

The same reflections apply in relation to Coopey's view of the work of Argyris (1991) on double loop learning. Coopey cites the work of Snell, Kleton and Fletcher (1994) and Becker (1992). The conclusions which must be drawn, he suggests, are the necessity for constitutional forms of checks and balances within organisations to ensure that leaders do look after the interests of constituents. He also cites Pedler et al's (1988) contention of the need to involve other stake holders, but criticises this on the basis that the authors do not propose a legislative and institutional framework within which a learning organisation might thrive.

This study suggests that, while clearly effective formal processes and structures are necessary, they develop and operate on the basis of the culture that exists in the organisation. The creation and support of an appropriate culture appears to be the key issue in achieving the objectives of the learning organisation including the management of conflict / politics in a productive way and the engagement of and 'ownership' by organisation members.

As has been said, the political dynamics of an organisation appear to be largely determined by the culture in the organisation, which in this study, seemed to be heavily influenced by the culture of leadership at senior levels. It can be suggested that any action undertaken is essentially political - what differs is its organisationally strategic intent and context (i.e. the effective achievement of the organisational mission and response to environmental challenges). This relates particularly to the relational and strategic/learning processes highlighted as significant in this research. Therefore, the approach that leadership takes, and the basis on which it takes it, seems to be essential as, in turn, this influences the reactions and behaviours of the other organisation members.

It has been seen that this, not only or even primarily, related to the end objectives of the leader but, importantly, it applied to the manner in which he operated. It applied to the definition of the role of leader and member. It applied to the approach and norms of participation related to communication, conflict and difference management / inclusion, and the approach to enabling change readiness.

The success of the approach of the leadership, from these case studies, appears to depend on the degree to which there is ownership and support throughout the organisation for this. In addition, it relates to the degree to which that support is given to a constantly evolving and responsive, reflexive organisation in respect of changes in its internal and external environments. This echoes Kanter (1988), Beer et al (1990), Giddens (1994) and Goleman (2000) and Quinn (1986) in particular in his discussion of the role of management in 'logical incrementalism'. Where they appear to concur is in their perception that what is directed in an innovative and learning organisation is a particular process as opposed to the direction being related to the achievement of a highly specific problem solution. This process must enable close contact with environmental sources.

Friedlander (1984), it was noted earlier, suggested that democracy becomes a functional necessity whenever a social system is competing for survival under circumstances of chronic change. Lijphart (1998) described democracy as an institutional arrangement that is able to produce as much consensus as possible in divided societies where a spontaneous consensus is in short supply. Each of the case studies reviewed had, as a core characteristic, a democratic structure and process. In this context, it appeared that these structures and processes did not enable the organisation to compete for survival or to achieve an effective level of consensus to enable the organisations to move forward. In fact, in a number of instances, they provided a focus for destructive, adversarial conflict and non-strategic decision making.

The reason for this may be found in Friedlander's (1984) proposition that, for a democratic system to be effective, certain conditions must apply based on a particular set of values - in particular that enable the creation of conditions for productive dialogue. He outlined these as being:

- Full and free communication regardless of position;
- Reliance on consensus rather than coercion or compromise to manage conflict;
- Influence based on technical competence and knowledge rather than personal whim / power;

- An atmosphere that permits and encourages emotional expression and task oriented behaviour;
- Human bias - accepting the inevitability of conflict between the organisation and the individual and a willingness to cope with and mediate this on the basis of rational judgement.

It is apparent that what he described are core elements of an organisational culture related to norms of participation. As has been identified in these case studies at least, the development and maintenance of such a culture is highly dependent on the culture of leadership in the organisation in relation to these very issues.

It is clear in the views of Friedlander (1984), Lijphart (1998) and Garratt (2000) that the purpose of having an effective democratic system in times of conflict and chronic change is to enable the survival of the organisation and its ability to move beyond those circumstances.

The inference from the conditions that are required for the existence of an effective democratic system is that without them, the system will fail in achieving the objectives. It can be suggested that this relates to the existence of organisational learning dysfunction. This impacts on the ability of an organisation to create conducive conditions for learning and innovation. This limits the horizons the organisation scans, under-utilises the resources available to it, and undermines the commitment and motivation of members to engage. Central to this is the manner in which conflict is utilised, difference is managed and communication occurs - in many ways this implies the manner in which power is shared and the degree of future and system focus employed.

Therefore, it is necessary for an organisation to reflect critically on its own behaviours internally in order to develop the conditions outlined (Pettigrew 1985, Habermas 1987, Giddens 1994, Argyris 1999). Senge (1993) has described this as the importance of the self-reflective principle. In each of the case study organisations, attempts at such reflection and review were made - in two cases, Concern and the I.N.T.O., this involved external

consultants being commissioned. In both cases the change that occurred was minimal and largely maintained the established relational and participation norms as was particularly evident in the case of the I.N.T.O. A similar experience occurred in the N.Y.F. during the 1980s. Internal review took place in this instance. Whilst this proposed and initially implemented quite radical changes in structures, these were ultimately undermined on the basis of re-establishing strong, centralised control consistent with the founding culture of participation within the organisation.

In the case of Concern, significant time delays in the implementation of effective change were suffered. These were only effectively embarked upon when the new Chairperson was elected in 1994 who had an effective cultural boundary spanning capability. The new Chief Executive shared this.

An analysis was undertaken in the N.Y.F. in the late 1990s under the auspices of the Chief Executive. This had a comparatively immediate and ongoing effect in terms of enabling strategic change related to increasing the effectiveness of the organisation in terms of anticipating environmental developments. Again, this reflected his cultural boundary spanning ability. This can be understood, in part at least, as relating to a strong reflective and listening orientation.

The difficulties in achieving change in these respects in the case study organisations might relate to what Argyris (1991) has described as first loop learning. This, he suggested, results from defensive reasoning that blocks learning even when commitment to learn is high as those involved have never learned to learn from failure. This may in turn be related to the experience of those in leadership being part of the dominant coalition and therefore not having had to contend with varying perspectives (alternative experiences of internal and external environments) - neither have they had the experience of being marginalised. That is not to suggest that this in itself would enable double loop learning - it is the reflection on the experience that enables development through the identification of pertinent issues.

It can be suggested, however, that the requirement to contend with varying perspectives may encourage a higher degree of reflection as questioning occurs. That is, of course, if the nature of the conflict is managed constructively. There are clearly key skills required in enabling this. The insulation of the dominant coalition in both Concern and I.N.T.O. particularly, and during much of the history of the N.Y.F., impacted on their ability to anticipate the need for change in response to environmental challenges, frame and accept the change required and implement it. It resulted in the exclusion of those with diverse perspectives and profiles from the core strategic processes of the organisations.

### *Learning and Strategic Dysfunction*

Senge (1990) - and echoed in the work of Hines (1993) Kim (1993), and Lesser and Prusack (2001) - suggested that organisational learning dysfunction may be a result of three fundamental problems organisations experience. Comparisons can be seen between these and the reactions of the dominant groups in the case study organisations.

The first issue Senge described as 'fragmentation'. This occurs when a complex situation is divided into its component parts. Each is studied individually and then recreated as a whole. Senge considered this to be a linear form of thinking precluding an understanding of the inter-relationships and dynamics of the whole organisational system.

It can be suggested, for example, that the I.N.T.O. C.E.C.'s approach to the McCarthy (1991) Report reflected this as did the introduction of the 1850 number. The rule changes introduced in terms of equality of participation c.1919 suffered similarly.

It could be suggested that the same was true in the changes brought about in the N.Y.F. during the late 1980s through to the mid-1990s. The fragmentation of objectives from methods employed had unforeseen negative impacts on the long term operation and sense of ownership within the organisation. This relates to the divergence between espoused theories and theories in use (Argyris 1991)



The second issue Senge (1990) identified related to 'competition'. He suggested this has become the dominant model for change and learning. The balance between competition and co-operation has been lost to the extent that competition dominates between those who need to co-operate. He suggested that in this context it is the appearance of success that is considered important rather than the reality of it. The dynamic results in defensiveness. Argyris (1991) described this as 'skilled incompetence'. As competition emphasises short-term results, Senge suggested it hinders learning which requires a longer time frame.

This need to show results quickly regardless of their long term system wide consequences results in a 'quick fix' mentality, creating system blindness. This relates to the manner in which conflict and difference is managed in an organisation. It also relates to an over concern with current realities at the expense of future envisioning. In all of the case study organisations, crisis was compounded with the use of severe adversarial, often interpersonal, conflict. The use of power and control, as has been discussed earlier, became the key dynamic. This was apparent during the 1990s /2000 in the I.N.T.O., during the late 1980s to the mid-1990s in the N.Y.F., and during the first half of the 1990s in Concern.

The final issue Senge (1990) identified in this respect relates to 'reactiveness'. As a number of commentators also suggested (Mintzberg and Waters 1982, Quinn 1986, Mintzberg 1987, Oriole 1989 and Kiernan 1993, Pascale 1994, Maletz and Nohira 2001, Carroll and Hatakensaka 2001) change often only occurs in an organisation in reaction to external forces. As such it is essentially reactive rather than envisioning. Senge suggested that reactivity among management has resulted in a fixation with problem solving - that is to say only dealing with the symptoms of a problem and therefore only producing temporary relief. This is akin to crisis management that may produce change but will enable little learning.

The experience of the case study organisations indicated that the culture of the organisations insulated them from recognising changes in their environments or engaging in explicit future envisioning which went beyond their current experiences.

In each instance, it was at a late stage before these needs were acknowledged and in each instance the ability of the organisations to achieve change was limited at that point. The process ensured that the response had to be reactive, and was ineffective (Porter 1979, Porter 1986, Dunphy and Stace 1990, Senge 1990, Stalk et al 1992, Kiernan 1993, Abrahamson 2000, Gadesh and Gilbert 2001, Swan and Scarbrough 2001). In the case of Concern and the N.Y.F., the introduction of new senior leadership with alternative cultural norms of participation enabled the development of strategic, more long term and environmentally conscious, responses.

This reflects Argyris's (1991, 1999) and Healy's (1998) view that learning is not simply a matter of how people feel about learning - motivation - it is also a reflection of how they think - the cognitive rules or reasoning they use to design and guide their actions. To address this it is necessary, as has been suggested above, to make these the focus of reflection - the 'self-reflective principle'. One of the main difficulties Argyris (1991, 1999) identified in bringing about change and engaging in reflective processes at an organisational level is that people consistently act inconsistently - apparently unaware of the contradiction between their espoused theory of action and their actual theory in use. He suggested that most such theories in use are based on a number of core values - these relate largely to Senge's (1990) concern with the impact of 'competition'.

These values are:

- To remain in unilateral control;
- To maximise winning and minimise losing;
- To suppress negative feelings;
- To be 'rational' - that is to suggest defining clear objectives and evaluating behaviour in terms of whether or not they have been achieved.

All of these relate to this discussion explicitly or implicitly. Underlying each is a behavioural norm or cultural value related to participation. In particular, they relate to conflict and difference management, communication and strategic thinking / reflection, and the inclusion of diverse others.

### *Conflict and Difference Management*

High levels of destructive, non-strategic, adversarial, interpersonal conflict were evidenced in each of the case study organisations. This in itself, and the manner in which this was managed, impacted on the ability of the organisation to move forward strategically. It was only after senior leadership with alternative cultural relational / participative norms took office in both Concern and the N.Y.F. that the tensions were eased allowing movement.

Many commentators have demonstrated that the conflict situation, in itself, can prevent those involved from performing at their best in terms of discussing problems under review, and from communicating their concerns effectively (Deutsch 1969 & 1994; Steisleder et al 1980, White 1984, Gilchrist 1998, Jenn et al 1999, Druskat and Wolff 2001). An example of this was the development of a culture of non-participation at formal meetings by some members of the N.Y.F. in the period 1989-1997.

It has been established that culture affects all phases of conflict including the antecedent conditions, thoughts and emotions pertaining to conflict, conflict behaviour and the aftermath (Pondy 1967). The approach to conflict during the late 1980s to the mid-1990s adopted by the senior leadership of the N.Y.F. impacted to such an extent that it caused the less developed regional youth services to adopt an approach of 'keeping the head down'. As Tjosvold (1995) stated, too little contention occurs when a single viewpoint becomes excessively dominant. This can cause organisations to become strategically and intellectually unbalanced.

In the I.N.T.O. during the final period under review, similarities between the findings of Carnevale et al (1998) and the nature of adversarial debate, engagement of activists, the perception of leadership, relationships between leadership and activists in that organisation exist. They suggested that conflict produces restricted categorisations and reduces general problem solving abilities. They prime cognition that later affects cognitive behaviour, independent of the actual variable (the focus) of the behaviour. In the I.N.T.O., the decision making process in relation to admission of a new category of membership (child

care assistants) was defeated on the basis of a limited engagement in real discussion and reflection on the issue. In the main, the debate appeared to be characterised by a sense of antagonism between the leadership and activists that limited the scope of the discussion and reflection.

Gilchrist (1998), Brown et al (1998) and Druskat and Wolff (2001) all suggested that for effective conflict resolution to occur it is necessary to establish nurturing relationships which are authentic, holistic and sustainable. For this to be achieved, the divergent groups must be provided with 'safe' opportunities initially in order to meet and work together around non-contentious issues and shared aspirations.

There needs to be an emphasis on the development of social infrastructure and a shared framework so that the relationship is not solely dominated by the area of difference / conflict. Gilchrist (1998) described this as a social networking approach that aims to create a sense of belonging. When the significant levels of destructive conflict emerged in all of the case study organisations, it occurred at a time when the thinking and culture which had been traditional in the case study organisations was no longer adequate as a basis for effective organisational strategy and environmental connection. This had been the basis on which the dominant coalitions had relied for cohesion and a sense of ownership and belonging among those that shared that culture.

The dominant groups perceived the demands for change as threats as the social network or infrastructure had not been developed to engage / include the divergent voices. This reflects the findings of Nadler and Tushman (1986) and Streble (1994) when they found that the lack of sufficient dissonance and constructive contention led to organisational complacency and stagnation. Excessive, ineffectively managed contention, Zelenik (1990), Tsjovold (1995) and Gilchrist (1998) all suggested, can cause paralysis. Formal structures and processes can impede progress as they become a focus for internal non-strategic power struggles, in turn generating new difficulties (Gilchrist 1998) and disabling the ability to deal effectively with environmental challenges.

The social networking approach only began to emerge in Concern and the N.Y.F. when the new leadership engaged the organisational members in the development of shared agenda and vision. They also linked this to attempts to increase the level of social infrastructure - to enable a relaxed organisation as one described it. These initiatives occurred during the final period under review and following the emergence of new leadership at senior level. It facilitated more strategic and effective engagement with the environmental challenges faced by the organisations.

This reflects the observations of Du Toit (1998) on the role of facilitators in conflict situations. The collective challenge, she suggested, is not what to do but what to be. The key strategic challenge for those involved in these types of situations is to appreciate who they are in order to discover what they can become. That is to suggest recognising the breadth of what they are in all its diversity, rather than simply perceive themselves in terms of conflicting subgroups with different cultures and visions. It also reflects Senge (1990,1994) in saying that learning occurs by telling the truth about the present (the environment and the effectiveness of the organisation's response to it) and identifying a motivating vision for the future.

Du Toit (1998) also identified the need to construct an inclusive culture with negotiated, shared symbols. This is a conscious development process. In each of the case study organisations, one of the key problems experienced was that the organisational culture was exclusive of many and only empowered those who shared the dominant culture. When crisis impacted to such an extent that overt conflict or issues related to non-participation were unavoidable, the prevailing cultures did not have shared, negotiated motivating symbols or processes to enable the organisation to manage the situation.

The concentration on the development of a Model and Quality Template for a Local Youth Service was a move in this direction in the N.Y.F. The development of the debate on Civil Society may also have been the beginning of such an initiative in Concern.

The focus on the professional aspects of teaching may have been an attempt to do this in the I.N.T.O. Even though the programme encouraged the involvement of formerly passive members, it could be suggested that the manner in which this was undertaken was not inclusive of both the formerly passive and the organisation's activists within the mainline structures of the organisation. It could be suggested that, in the end, it caused increased dissension and destructive conflict because of this. In effect, it had not become a shared symbol or motivating vision for the entire organisation even though inherent in it was greater effectiveness in terms of undertaking the mission of the I.N.T.O. in terms of the environmental challenges faced.

Kiernan (1991) suggested that, in the past, 'control' was the dominant responsibility and test of senior management / organisational leadership. In the case study organisations, it can be seen that for most of the history of each organisation control was the dominant concern of the senior management / leadership. Such was this the case, that it stifled diversity in environmental feedback and reflection and organisational innovation - except in a very limited and congruent way. Examples of this are the dismantling and under resourcing of the constituent bodies in the N.Y.F., the manner in which new structures were established in the I.N.T.O. and the under development of strategic management in Concern. The impact of externally commissioned reviews of the I.N.T.O. and Concern can be similarly interpreted.

#### *Participation Roles and Styles*

This experience is reflective of what Dixon (1994) described as the 'Superman' approach where the central leader / authority collects information, analyses it and tells others about it and what it means. The information subordinates have is seen as the valuable commodity, not their analysis or reflection on it. The communication process is largely in one direction - downwards. The approach ensures, among other things, that diversity is organised out of the process. Senge (1990) stated that this approach to leadership is rooted in an individualistic and non-systemic worldview. The focus is on short-term events and charisma rather than on systemic and collective learning - in other words to not have a developed environmental awareness. It can be seen that this echoes the approach to

leadership in the N.Y.F. during the 1960s and 1989-97 in particular, the paternalistic approach to leadership in the I.N.T.O. identified in the McCarthy (1991) report, and similarly the culture of leadership in Concern until 1994.

It has further been suggested by Dixon (1994), Senge (1990), Bonbeau and Meyel (2001), that within the learning organisation, the roles of leader and member require radical redefinition. This is because it is felt that learning acts to lessen the conventional power and attributed wisdom of the leader. This implies that the leader's ideas should be challenged and tested through rational reflection processes involving organisation members rather than being accepted unquestioningly by them because of the origin of the ideas at a higher level of the organisation - presumably the same applies in relation to their rejection. Therefore, leaders in such organisations require egalitarian values that support individual ability and collective wisdom.

The leader is a supervisor in the process of finding leverage in jointly established directions and goals. It requires skills to enable organisational dialogue - to enable members to become involved in all aspects of the strategy cycle. As Fahey et al (1998) and Keher (1993) suggested, this requires the ability to build shared context at local level in particular - implying the existence of a shared understanding of the organisation's external and internal worlds, reflecting Habermas (1987)

It was only with the emergence of new leadership in the N.Y.F., in particular, that organisational learning (involving effective environmental scanning and anticipation) became centre stage as the dominant responsibility of senior management / leadership - as Kiernan (1991) suggested was the need in modern times. Similar moves were made in Concern with the strategy development processes introduced and the increasing focus on evaluations influencing decision making which occurred during the late 1990s / 2000. Kiernan (1991) observed that this type of approach focusing on organisational learning emphasises the utilisation of agreed processes over rules in the maintenance of organisational control, and the need to ensure effective feedback to the organisation from the environment. He suggested this has particular implications for the nature of leadership

in terms of who exercises it and how it is exercised. This was particularly evident in the N.Y.F. in the dismantling of the traditional structures, the delay in the adoption of the prepared national strategy and the empowerment of a local strategy development process involving the development of increased environmental awareness. All of this resulted from the alternative approach adopted by the Chief Executive appointed in 1997.

This review also sheds a particular light on the respective roles and relationships of paid staff and volunteers in voluntary organisations, and the level of competition / co-operation which occurs impacting on the strategic and learning capabilities of voluntary, democratically structured organisations. Issues arose in relation to these in each of the case studies impacting on the degree of involvement of each group in strategic processes, and often on the level of narrowly political or non-strategic political behaviour that occurred in each instance, and the levels of insulation from the environment.

The literature also comments that leadership in this context needs to ensure an understanding among members of the processes in which they are engaged and their potential roles within it - in order to enable and ensure their participation and empowerment within them (Fahey et al 1998). This requires the effort to ensure that conflict is depersonalised (Leonard et al 1998), and sensitivity is demonstrated to 'people issues' (Van Kogh 1998). The latter highlighted the need for leaders to pursue guiding relationships characterised by a caring approach - showing serious attention, concern and interest that helps the 'other' grow and become actualised. This type of activity entails open communication, explicitly stated values of courage and trust, training in caring behaviours, project debriefings and social contact.

It can be seen that in the initiatives undertaken in the late 1990s in both Concern and the N.Y.F., these characteristics were evident in the senior leadership. In earlier phases of the organisations, however, they appear to have been absent. This contributed to the development of the dominant culture in these organisations that subsequently inhibited the ability of the organisations to engage in change in a timely and strategic manner in response to the environmental challenges faced.



Within the I.N.T.O., the relationship between the leadership and members / activists did not allow these conditions to develop. This was particularly evident in the national debates that took place during the 1990s and 2000 - the debate on the extension of membership to child-care assistants was a prime example. What may have had a particular impact on this at national level was the increasingly complex and extensive agenda which inhibited reflection at the C.E.C. and therefore, the identification of the need to prepare members for change effectively as a core concern at an early enough stage. This also signifies a listening and reflection dysfunction within the organisation. This impacted on the ability of the district representatives to span boundaries within the organisation, enabling understanding and translating information and facilitating shared understandings across organisational boundaries (Dixon 1994; Brown et al 1998). It also reflected the absence of 'slack' organisational time - thinking time - at C.E.C. level (Alvesson and Karremer 2001, Lesser and Prusack 2001).

At the end of the period reviewed in the I.N.T.O., the General Secretary expressed frustration at the inability or unwillingness of the membership to embrace change demanded by external environmental pressures. Distrust of the senior leadership was expressed by activists lower in the organisational hierarchy. This further indicated a dysfunction in relation to 'translation' or boundary spanning within the I.N.T.O. in the latter period reviewed (Input Output Analytical Model Part 3). Brown et al (1998) suggested that this role is a powerful one requiring the trust of the parties involved as personal interpretation inevitably occurs.

In Concern and the N.Y.F., the ability to begin to move forward and address the challenges facing the organisations systemically and strategically was enabled by the existence of effective boundary spanning capacity / translation capacity at senior leadership level combined with their environmental awareness. This occurred with the election of the new Chairperson in 1994 in Concern and subsequently with the appointment of the new Chief Executive in 1997. Similarly, it occurred with the appointment of the new Chief Executive in the N.Y.F.

These people also appear to have approached their leadership roles in terms of Senge's (1993) definition of the roles and tasks of leadership. They undertook the designing of the governing ideas and purpose, vision and core values by which the organisations and their members would operate. They designed policies, strategies and structures that translated guiding ideas into business decisions. In the N.Y.F. particularly, the new Chief Executive separated policy making and decision making in order to ensure reflective space existed in the organisation.

The incumbents also undertook to create effective learning processes that would underlie policies, strategies and structures - ensuring that processes existed to revisit and improve them. They saw planning as an organisational learning and development process related to the achievement of the organisation's mission and response to environmental challenges.

It would appear, that within the I.N.T.O., the entrenched structure, rule and procedure laden culture prevented effective development in these respects as the reflective space created was restricted in its engagement with the decision making structures and processes in the organisation.

One of the responsibilities of leadership identified by Senge (1994) was the enabling of organisation members to achieve more accurate, insightful and empowering views of reality. The task, he suggested, needs to be achieved by paying explicit attention to people's mental models and using the influence of the system perspective. The task is therefore to enable members to look beyond the superficial conditions and events to underlying causes of problems. It can be suggested where this did not occur in the case study organisations, significant destructive conflict ensued and resistance to change intensified. Senge related this to the need to ensure the readiness of members to change.

The same commentator described one of the roles of leadership in the learning organisation as it relates to stewardship. This is at two levels. The first is the impact of the leader on members. This in turn effects the levels of commitment and shared ownership amongst

them. It can be seen how difficulties arose in respect of this in the N.Y.F. until the later 1990s and in the I.N.T.O. particularly. Through the particular approach to leadership adopted in these organisations (in Concern until 1994). This had the effect of reducing the levels of shared ownership of the organisation among the membership.

The issue of ownership is one that has been addressed as pivotal in two of the organisations in recent times. The N.Y.F. and Concern have adopted strategic processes to address this need.

The second issue Senge discussed related to the role of leader as steward was the responsibility of leadership for the mission of the organisation. Difficulties also arose here for all of the case study organisations. In the I.N.T.O., the development of the emphasis in the mission of the organisation on professional issues reflecting environmental challenges was not effectively shared with the membership. This seems, in recent times, to be having the effect of creating increased destructive and adversarial conflict internally between the leadership and membership - impacting on the external perceptions of the I.N.T.O. This has undermined the organisation's ability to achieve the organisation's mission and respond effectively to environmental change.

In Concern, the dysfunction in the environmental scanning capacity of the organisation impacted on the ability to redefine the mission of the organisation in a changing climate. Similarly, in the N.Y.F., the methodology applied to protecting the mission of the organisation during the 1989-97 period had the effect of alienating sections of the membership and staff.

It is clear from this discussion of leadership that the role of membership also alters dramatically in the learning organisation. Jago and Vroom (1988) observed that participation not only requires facilitating systems but also individuals wanting to take advantage of the opportunities provided. The roles they are required to play are as information sources, information processors / analysts, managers and leaders in their own situation, members of cross functional teams and implementers of strategy.

It has also been identified that members need the following in order to participate effectively. They need to be ready to accept and be capable of undertaking the processes. They need an in depth understanding of the rationale and methodology of the processes. They need the skill, knowledge and personal self-confidence relevant to the process. They need to be given opportunities that are effectively structured and framed to enable members to participate in terms of 'feeling comfortable' and in terms of the task to be achieved. As leaders are also members of the organisation, they are also subject to these.

In both the N.Y.F. and Concern, recent initiatives in relation to the strategic development of the organisations have responded to these needs and conditions. Prior to this, however, this was not the case. The membership, even activists, did not engage in the range of roles identified above and the culture of leadership in particular precluded them from being in a state of readiness for and understanding of environmentally necessitated change - in order to embark in heavily engaged participation and shared leadership / ownership as discussed earlier.

Within the I.N.T.O., the highly entrenched culture institutionalised in the formal structures and processes of the organisation had a similar debilitating effect on the general membership.

### **The Study Hypotheses**

In terms of the study hypotheses, the analyses of the case studies found that the organisational dynamics in the three case study organisations demonstrated the following.

The under or non-participation of certain groups of members in the N.Y.F., the I.N.T.O and Concern Worldwide can be understood as a symptom of organisational (system) learning dysfunction. The lower the levels of diversity of membership participating in the integrated strategic development functions (strategic-learning tasks) of the organisations the greater was the negative impact of this on the organisations' learning and strategic change

capabilities in effectively achieving the missions of the organisations and in responding to environmental challenges.

The process by which organisation cultures in the N.Y.F., the I.N.T.O. and Concern Worldwide were established and maintained provides an explanation for the existence and perpetuation of the participation difficulties and learning dysfunction within them. This related to the degree to which organisational culture reduced or enabled a diversity of membership in participating in the strategic functions of the organisations.

The organisational initiative which appeared to have a chance of success in addressing these participation and learning difficulties in the N.Y.F., had as its focus change at a systemic organisational level rather than at a non / under participating individual member or group level only. Similarly, the successful organisational initiative which began to address these participation and learning difficulties within Concern Worldwide had as its focus change at a systemic organisational level rather than at a non / under participating individual member or group level only.

In the I.N.T.O., however, the focus of attempted change in respect of these issues was at a non / under participating individual member or group level only. This approach did not succeed in addressing participation and learning difficulties. This was demonstrated in the increasing difficulties experienced in the organisation. This was in terms of the willingness of the membership to support the leadership in undertaking necessary, organisationally strategic change resulting from environmental changes impacting on the future survival of the organisation. This therefore, also, confirmed the hypothesis.

The change initiative in the N.Y.F. addressed the effects of organisational culture on how and when the membership were involved in the organisational strategy development cycle particularly through its impact on:

- Communication
- Management of conflict / difference
- Organisational leadership, representative and membership roles.

The change initiative in Concern Worldwide addressed the effects of organisational culture on how and when the Council membership and staff were involved in the organisational strategy development cycle (action, reflection, conclusion drawing / decision making and testing) particularly through its impact on the same cultural norms of participation. It had not addressed the same issues in terms of the general membership at the time of undertaking this study. This area remained contentious among the leadership of the organisation.

The change initiatives in the I.N.T.O. did not address the effects of organisational culture on how, and when, the membership was involved in the organisational strategy development cycle -particularly through its impact on these norms of participation. This was even though organisational culture had been identified as a core issue impacting on change capabilities within the organisation.

Specific and congruent arrangements for the management of this systemic change, and a timeframe for its completion, through the statement of the time frame for the strategic plan, was put in place by the N.Y.F. The same was true in Concern Worldwide. These arrangements were not put in place by the I.N.T.O. The organisation did not succeed in increasing effective membership participation, and did not increase the learning and innovative capacities of the I.N.T.O. As a result, the ability of the organisation to survive and thrive into the future remained in doubt.

In addition to increasing effective membership participation, the change initiative increased the learning and innovative capacities of the N.Y.F. as evidenced by the increased ability of the organisation to engage in policy and strategic change - increasingly owned by the membership as demonstrated by its level of engagement. This was a slow process, however, and may not have been sufficiently timely to ensure the survival of the organisation due to emerging environmental conditions.

Within Concern Worldwide, the strategic change initiative increased effective membership participation at Council and staff levels. It had not as yet been extended to the general membership. This change initiative increased the learning and innovative capacities of this non-profit, democratically structured organisation as evidenced by the ability of the organisation to adopt and implement the strategic plan and to engage in an effective and timely review process involving Council members, Head Office and field staff.

The I.N.T.O. did not succeed in increasing effective membership participation in an integrated and systemic manner in the strategic processes of the organisation, and did not increase the learning and innovative capacities of the organisation. As a result, the ability of the organisation to survive and thrive into the future, in a rapidly changing environment, remained in doubt.

## Chapter Nine: Conclusions

This study contributes to the understanding of the operation of democratically structured voluntary organisations within the context of the literature on organisational dynamics and behaviour. In particular, it contributes to the development of a theoretical understanding of the management of strategic change, organisational learning and its relationship to membership participation within such organisations in order to effectively achieve the mission of the organisation and respond to environmental challenges.

There has been a particular focus in the study on organisational learning as a process of continuous strategic change. This is because of the specific characteristics of democratically structured, voluntary organisations - in particular the voluntary commitment to involvement by their memberships. This is a topic that appears to have received comparatively little academic attention (Anheier 2001). This is surprising given the growing significance of such organisations particularly through Social Partnership arrangements locally, nationally and at European level, and the importance of organisationally strategic change in enabling responsiveness to changing environments.

Pascale (1994) proposed that strategy maybe defined as all things necessary for the successful functioning of an organisation as an adaptive mechanism. It enables the organisation to respond, to move, change and develop towards the effective achievement of its goals within the larger system or environment within which it exists. This approach to the concept of strategy implies one that attempts to balance the need to control organisational action and to learn from it in the context of a changing environment (Mintzberg 1987).

The study has demonstrated the inextricability of organisational participation, learning and strategic change capabilities in enabling organisational effectiveness and responding to environmental challenges. These inter-relationships have been shown to relate to the nature of communication, conflict and difference management, and the consequent approach reflected in participation roles and styles impacting on the relationship between member



and organisation. This relates to the concept of 'communicative action' (Habermas 1987) and the issues raised regarding the capability of organisations to learn through individuals (Kim 1993, Argyris 1999, Couto 2002)).

During the evolution of each of the case study organisations, it was apparent that their adaptive capabilities were underdeveloped. This led them to either interpret environmental change inappropriately or to ignore it until it was forced upon them. This study has explored how the development of organisational culture in these organisations, particularly in relation to membership participation, impacted on strategic difficulties faced by the case study organisations.

In each of the case studies, the impact of the attempt to control organisation change at the expense of learning from past action, current environments and anticipating future environments was seen to have debilitating and disenfranchising effects. These undermined the abilities of the organisations to cope with their changing contexts in a timely and strategic fashion. With an alternative approach to leadership emerging in two of the organisations, this type of difficulty was lessened - thus enabling those organisations to begin to move forward strategically.

The change in leadership approach was related to lessening the concern with achieving / maintaining total control and increasing the levels of engagement with environmental / need sources, in all aspects of the strategy cycle. This has particular implications for the role of staff in voluntary, democratically structured organisations, and the nature of the inter-relationships between staff and 'volunteers' in terms of the definition of roles as 'enablers' and strategic-learning process managers – as opposed to 'servants' or 'controllers' of 'volunteer' members and / or organisational action.

As has already been suggested in the business literature, organisational success within voluntary, democratically structured organisations appears to depend, therefore, on the ability to anticipate environmental trends and respond to them in the context of the mission of the organisation. When looking at strategy in this way, its essence relates to the

dynamics of the organisation's behaviour and the related organisational capabilities that enable it to engage in this task in order to be effective. It is suggested, therefore, that in competitive, constantly and rapidly changing, complex environments, the ability of an organisation to learn and respond effectively to that learning - to innovate, to engage in strategic change - must be the central tenet of organisational strategy.

The ability of a voluntary, democratically structured organisation to develop and ensure ownership among organisation members of the effective processes, capabilities and attitudes to enable this is intimately linked to its ability to survive and thrive. The case studies demonstrated that this process of engagement of organisational members in all facets of the strategy cycle, and the active enabling of them to do this, was a particular issue in attempting to move the organisations forward out of crisis, or potential crisis. This related to the approach to management and leadership adopted in the organisations during their evolution.

Voluntary, democratically structured organisations that have not developed such capabilities may be forced to change dramatically and completely within a short space of time - or face destruction due to being 'out of touch' with environmental developments. This leaves such organisations open to greatly increased risks. The requirement to approach change on a regular basis in this way can undermine the strength of the organisation. It also requires a high degree of control over core organisational human resources - an unlikely scenario for organisations structured in this manner.

This may be the course on which one of the case study organisations is set. Whilst the organisation has accepted the need to change, the engagement of the membership in the recognition of the need to change, and enabling them to engage has not yet, effectively, been addressed. This may relate to a number of factors. At the core is the entrenched nature of the organisational culture determining its structures, rules, procedures, processes, levels of environmental insulation, roles, relationships and interactions between leaders and members.

These issues have particular implications for non-profit, democratically structured organisations. Such organisations are dependent on their memberships for their power and status, access to target groups and information, to have effective governance and, at a fundamental level, the ability to achieve their missions. Yet, the membership of such organisations - as a core organisational resource - is committed to involvement only on a voluntary basis over which the individual member has, to a very large extent, complete control over the decision to continue to engage.

The ongoing commitment of the member to the organisation is often dependent on what the member receives, what s/he is enabled to contribute, the sense of ownership or alienation the member experiences. The approach and philosophy of leadership within a democratically structured, voluntary organisation is, therefore a crucial consideration. It is a key issue in the management of organisationally strategic change. It also relates to the maintenance of healthy relationships between the member and the organisation. The evidence of this study suggests that leadership focused on 'learning' rather than 'controlling' is essential within democratically structured, voluntary organisations operating in complex environments.

The Cycle of Meta Enquiry developed by Coghlan and Brannick (2001) provides a useful way in which to look at the inter-relationships that exist in this organisationally strategic, learning system and its component parts / cultural contexts. Nonanko and Kohono (1998) have identified the importance of these processes in enabling creativity and development within organisations. They have commented in particular on how the tacit knowledge of individuals can be made explicit and shared with others in the pursuit of knowledge creation (the learning process) - which they describe as the main resource of the organisation. They differentiate it from information gathering in isolation from reflective processes. Coghlan and Brannick have highlighted the integrative function of reflection. This provides a convincing explanation for Kiernan's (1993) contention that organisational learning will take over as the dominant responsibility of management / leadership.

Nonaka and Kohono have identified the reasons why this is significant in addressing the issues outlined above. They propose that the encouragement of knowledge creating teams / projects (organisation) are of importance as they are places of reflection where value creation occurs through interactions within groups. Through these processes the individuals participating realise themselves as part of the environment on which their lives depend - this relates to Habermas (1987) also. In the case study organisations, it was seen how crisis situations emerged from the absence of effective reflective spaces linked to the decision-making functions of the organisations. There was a number of impacting factors:

- The framing of the agenda for discussion being overly insulated from the likely challenges the organisations were to face;
- The degree of control applied to who was enabled to engage in the discussion / reflection;
- The separation of discussion / reflection from the decision making function / task;
- The norms of communication and conflict / difference management in places of discussion / reflection;
- The levels of listening and engagement with the experiences and emotions of those involved;
- The degree to which a 'systems' versus a reactive approach was brought to bear.

It is notable how the new leadership in two of the organisations at the end of the period reviewed addressed these particular factors in their approach to enabling the organisations to meet the challenges they faced in their internal and external environments. This responded also to the elements identified in the business literature enabling the maximisation of the organisational ability to learn and to enable effective innovation. This suggests that it is a necessity for all organisation members in the types of organisation under review here, at all levels, to be actively engaged in the gathering of data, evaluation / reflection and implementation of organisation strategy. This implies the need to:

- Maximise environmental information gathering;
- Utilise open two way communication which enables the development of an agreed interpretation of the information and the development of common goals whilst at the same time involving diverse perspectives. This inevitably will result in conflict that

can be used in a constructive, energising manner - rather than as a tool of destruction;

- Enable the leadership and management capability of all, that is taking active responsibility for the achievement of organisational goals by all organisation members;
- The establishment and entrenchment of a supportive organisational culture enabling continuous learning and innovation.

In the context of this study, the fundamental influence on the participation patterns, organisational learning and strategic capabilities of the organisations appears to have been the culture of the founding activist groups in each instance. Their culture was particularly pertinent in relation to the culture of leadership - specifically the norms of behaviour and 'world view' of leadership. This appears to have been a dominant influence in the development of general norms of participation within, and the operation of, the organisations. These related specifically to the following:

- The approach to strategic thinking and individual / communal reflection;
- The focus of power and control, related behaviours and relationships;
- The levels of cohesion and sense of 'belonging' experienced;
- The sense of ownership and sense of threat to ownership of the organisation;
- The roles, rules, processes, procedures and structures adopted and operated;
- The nature of communication and information sharing;
- The approach to conflict / difference management.

The operation of norms related to these influenced the development of patterns of participation and engagement within the organisations over time. The patterns reinforced the behaviours and the behaviours the patterns of participation. Thus, the organisational cultures became entrenched.

This impacted on the learning capacities of the organisations, the development of learning dysfunction and the ability to engage in effective strategic change in a timely fashion in

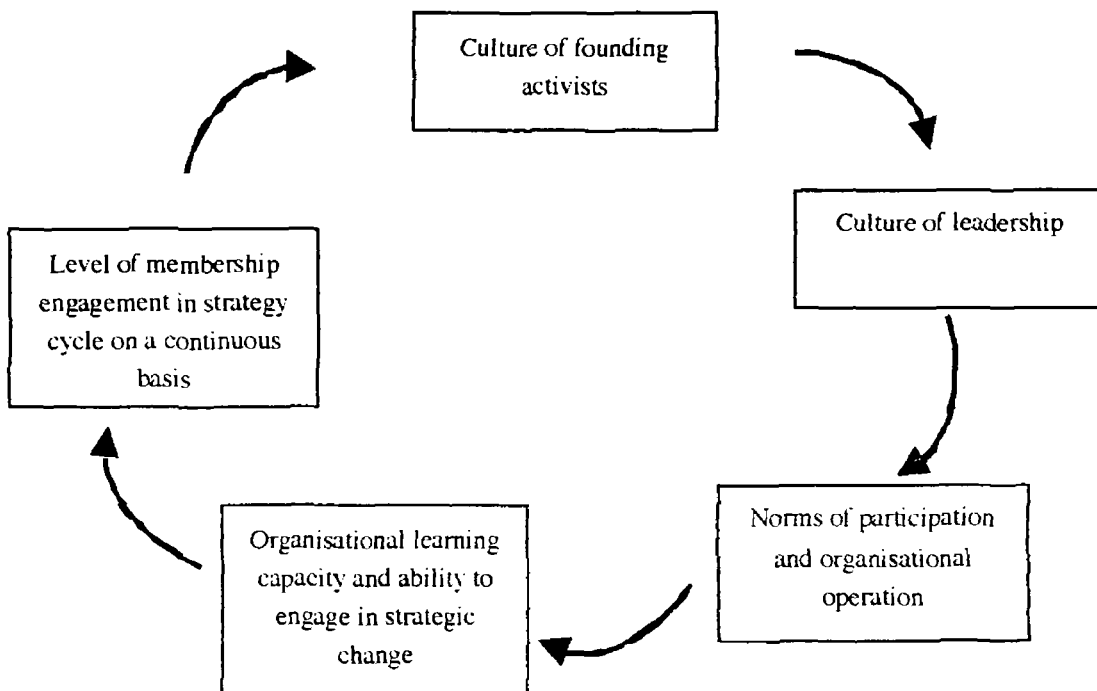
response to environmental challenge. This was because the patterns of participation impacted on:

- The level of environmental insulation which existed;
- The degree to which diverse perspectives and cultural norms were included;
- The degree to which those with 'cultural boundary' spanning capabilities were involved at the apex of the organisations;
- The effectiveness of accountability mechanisms and processes;
- The ability to respond to the need for change in an effective and timely manner;
- The level of readiness among organisation members for change;
- The level of opportunity provided for effective communal reflection and strategic thinking.

The Input Output Analytical Model utilised in this study enabled the identification and analysis of the operation, over time, of these factors and processes and their inter-relationships. These were demonstrated to have determined the ability of the organisations to engage effectively in the strategy cycle on a continuous basis - engaging in listening, learning, deciding and acting - and so effectively undertake the mission of the organisation and respond to environmental challenge.

This can be described as a cycle whereby the culture is reinforced by the interaction of these cultural factors on a continuous basis

**Exhibit 16**                    **Cycle of organisational culture reinforcement, development of membership participation, organisational learning capacity and ability to engage in strategic organisational change continuously.**



It can also be described in the following way in terms of the 'flow of factors' impacting on membership, participation, organisational and strategic change capabilities (Exhibit 17).





**Exhibit 17 The Factor Flow impacting on membership participation, organisational and strategic change capacities**

Culture of founding activists	Culture of leadership	Norms of participation & organisational operation:	Learning capacity and ability to engage in strategic change	Level of engagement in strategy cycle on a continuous basis by membership
	<ul style="list-style-type: none"> <li>▪ Norms of behaviour related to participation</li> <li>▪ World view</li> </ul>	<ul style="list-style-type: none"> <li>▪ Strategic thinking and reflection</li> <li>▪ Power, control and related behaviours / relationships</li> <li>▪ Sense of ownership/sense of threat</li> <li>▪ Roles, rules, procedures, structures</li> <li>▪ Communication and information sharing</li> <li>▪ Conflict management</li> </ul>	<ul style="list-style-type: none"> <li>▪ Levels of environmental insulation</li> <li>▪ Inclusion of diverse perspectives and cultural norms</li> <li>▪ Inclusion of cultural 'boundary spanners' at apex</li> <li>▪ Effectiveness of accountability mechanisms/processes</li> <li>▪ Ability to respond to need for change in effective and timely fashion</li> <li>▪ Levels of readiness amongst members for change</li> <li>▪ Opportunities for communal reflection and strategic thinking</li> </ul>	

Responding to these dynamics such that voluntary, democratically structured organisations can develop effective learning and strategic change capabilities (defined as the strategic-learning tasks discussed earlier) for the long term, requires a fundamental shift in thinking in terms of the relationships between organisational subparts, and particularly between the apex and all others levels of an organisation.

It may be worth visualising the structures of voluntary, democratically structured organisations in terms of the processes and tasks involved. This is rather than in terms of the levels of 'authority', 'responsibility' and 'ownership' - as is more traditionally the case in hierarchical forms of organisations of which democratically structured, voluntary organisations are obvious examples. It might be worth considering these processes and tasks in horizontal terms, through a series of interrelated, concentric circles - each with a particular focus of data collection and analysis / reflection.

The outer circles involve consideration of broad vision and analysis, each narrower, inner circle involves more limited issues considered within the established broader context. Equally, the inner circle may be a starting point that extends beyond its boundaries into the next, outer circle allowing for a more systemic understanding of the matter under review and greater connection with the external environment.

At the very centre, facilitative leadership is located ensuring dialogue between each area within its proper, full context. The broadest considerations are located closest to the boundaries with the environment and, in fact, dialogue with this to ensure the vision and understanding of the organisation is closely connected to social and economic change on an ongoing basis.

A possible advantage of considering an organisation in these terms is that it allows a move away from a rigid view of 'participation' related to degrees of control and influence over decision-making - that is only one strategic-learning task. It would enable a greater balance to be established with the other organisational learning and strategic tasks of communal data gathering, action and reflection.

This should not be taken to indicate that an organisation operating on this basis does not require effective constitutional accountability mechanisms, checks and balances in the use of power and influence. The study demonstrated, however, that in the case study organisations, which were established on the basis of such structures, the effectiveness of these was determined by the dominant organisational culture. Therefore, such mechanisms must be fully integrated with the strategic-learning process. The reflection / evaluation tasks of the strategy cycle provide particular opportunities to do this. Similarly, the operation and impact of 'political behaviours' was determined by the framing organisational culture.

This has implications for how democratic process is conceptualised – primarily as a means of accountability and decision-making, or as a broader process which encompasses these tasks but also includes the other tasks of strategic-learning including action, communal reflection and theorising / conclusion drawing. In a broader social context, this has significance for the consideration of the idea of the 'learning society' in terms of framing democratic process as systemic learning at societal level. This could relate, for example, to the operation of Social Partnership at various levels.

The study has identified a number of central considerations relating to effective continuous strategic change and organisational learning in voluntary, democratically structured organisations. This includes the importance of approaching the matter on the basis of an integrated system. This approach is primarily concerned with a system of processes rather than structures. The study has established a 'chain of evidence' from the general literature on organisational dynamics and related themes. By looking at the matter in this way, a rounded perspective has been adopted regarding strategic change / organisational learning. It has brought together the specific impacts of various organisational dynamics and relational processes impacting both positively and negatively on the strategic change, strategic-learning, capabilities of the types of organisations under review in a systemic manner.

It can be suggested, therefore, that in terms of the original hypotheses this study undertook to explore, the following can be said. The under or non-participation of members in these voluntary, democratically structured organisations can be understood as a symptom of an organisational (system) learning dysfunction. The lower the level of participation by a diversity of members in the integrated strategic functions of the organisation the greater the negative impact of this on organisational learning and strategic change capabilities.

The process by which organisational cultures are established and maintained provides an explanation for the existence and perpetuation of such participation difficulties and learning dysfunction within these organisations. This related to the impact of the dominant organisational culture on hindering or enabling a diversity of members to participate in the strategic development functions.

Where organisational initiatives addressing these participation and learning difficulties in these organisations have greater degrees of success, the focus of the initiative is on change at a systemic organisational level rather than at a non or under participating individual member or group level only. These change initiatives address the effects of organisational culture on how and when the membership is involved in the organisational strategy development cycle. This is through its impact on the following relational norms and processes in particular:

- Communication;
- Internal management of conflict/ difference;
- Organisational leadership / representative and membership roles.

This creates space for communal reflection processes in particular. This has implications for the manner in which 'equality' initiatives are framed and implemented within organisational settings as the focus of the change process becomes the change of the organisation's behavioural norms of participation within strategy cycle tasks.

In this context, the approach to leadership adopted at the apex of the organisation is of significance in determining the strategic-learning capabilities of the organisation at all levels. Strong central leadership enabled these change processes, however the focus of the

strategic-learning, capabilities of the types of organisations under review in a systemic manner.

It can be suggested, therefore, that in terms of the original hypotheses this study undertook to explore, the following can be said. The under or non-participation of members in these voluntary, democratically structured organisations can be understood as a symptom of an organisational (system) learning dysfunction. The lower the level of participation by a diversity of members in the integrated strategic functions of the organisation the greater the negative impact of this on organisational learning and strategic change capabilities.

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This creates space for communal reflection processes in particular. This has implications for the manner in which 'equality' initiatives are framed and implemented within organisational settings as the focus of the change process becomes the change of the organisation's behavioural norms of participation within strategy cycle tasks.

As such, it has extended this theory by applying it to a new organisational domain. This has contributed to increasing the integration of organisational theory regardless of the type of organisation involved (i.e. not business organisations or public sector agencies alone). It has thus allowed for new insights and perspectives to be developed across the boundaries of particular organisational sectors.

The use of this body of theory has focused on the importance of key, organisationally strategic issues and priorities rather than those of particular individuals or groups. This has enabled 'participation' to be considered as a key strategic issue rather than as an issue of 'social justice' or 'voice' or 'rights only'. This, therefore, provides the opportunity to fully engage senior management of organisations in its consideration, and to review the approach to 'equality' initiatives undertaken in organisational contexts.

The study discusses and suggests the role of democratic processes as a means of systemic learning, rather than simply one of accountability and decision making.

In the context of these considerations, the study has also raised questions regarding the role of staff employed by voluntary, democratically structured organisations – and in particular the nature of the inter-relationships between such staff and 'volunteer' members. It has also emphasised the importance of strong senior organisational leadership with a clear focus on enabling organisational learning in the organisational sector under review.

Finally, the study has proposed and tested a new analytical model which facilitates the development of strategic and learning competencies within democratically structured voluntary organisations through enabling the effective diagnosis of organisational processes. The model was found to be useful in gathering data, structuring that data, analysing the data at a systemic level, ensuring the theoretical relevance of the data and enabling comparison between the case studies.

Where difficulties were encountered, these related to the volume of data produced by the

It is significant for a number of reasons. These include the following.

The study has situated the research within an established body of theoretical literature. As such, it has extended this theory by applying it to a new organisational domain. This has contributed to increasing the integration of organisational theory regardless of the type of organisation involved (i.e. not business organisations or public sector agencies alone). It has thus allowed for new insights and perspectives to be developed across the boundaries of particular organisational sectors.

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In the context of these considerations, the study has also raised questions regarding the role of staff employed by voluntary, democratically structured organisations – and in particular the nature of the inter-relationships between such staff and 'volunteer' members. It has also emphasised the importance of strong senior organisational leadership with a clear focus on enabling organisational learning in the organisational sector under review.

Finally, the study has proposed and tested a new analytical model which facilitates the development of strategic and learning competencies within democratically structured voluntary organisations through enabling the effective diagnosis of organisational processes. The model was found to be useful in gathering data, structuring that data, analysing the data at a systemic level, ensuring the theoretical relevance of the data and

of the White Paper on the Voluntary and Community Sector in Ireland (Department of Social, Community and Family Affairs 2000) and the reliance on Social Partnership at national level are clear demonstrations of this. The ability of voluntary sector organisations to fulfil these social mandates will impact on their continued funding, and the perception of their usefulness to society. This study indicates that such organisations structured democratically may need to review their operations with a view to evaluating their abilities to meet these expectations.

Non-democratically structured organisations in the business sector have already been demonstrated in the literature to suffer similar learning disabilities. The impact of membership participation on organisational learning as identified here may, therefore, have implications for the business sector and elsewhere also.

In terms of the operation of Social Partnership at intra-organisational levels, the study also has relevance. This is for three reasons. Firstly, the study indicates that certain conditions are necessary for the effective operation of membership participation initiatives / representative structures in enabling strategic change and innovation - organisational learning. The N.E.S.F. (1997), for example, appears to be moving in this general direction through the issues considered in its report "Framing the Partnership".

Secondly, allied to the development of Social Partnership at national level in Ireland, a variety of local development partnerships to combat social exclusion have been established in recent years. Following the publication of policy (Dept. of the Environment and Local Government 1994) enabling local government reform, these partnerships are gradually being included within the local government system. These developments relate particularly to the influence of various E.U. anti-poverty programmes.

The partnerships involve statutory bodies, voluntary agencies and the target populations of projects. Some evaluation of these systems has been undertaken (for example: O'Conghaile 1988, Frazer 1994 and Craig 1995, Sabel 1996, Williamson 1999). The evaluations have identified factors that have helped and hindered the effectiveness of these



'partnership' arrangements. The evaluations do not appear to have been located, however, within any specific body of theory or literature. Though these evaluations relate to inter-organisational dynamics, they have some relevance to the issues considered at an intra-organisational level in this research in terms of the inclusion of diverse participants and perspectives in organisationally strategic development. The application of the analytical model contained in this study to this body of research may be useful in order to situate the experience within the theoretical literature - and thus enable future development.

Thirdly, it is apparent that in many instances trade unions are providing the support structures for employee participation in enterprise level partnership arrangements. While clearly such support is necessary, their ability to provide what is required may be hindered by the types of relational dynamics identified in this study. The findings may help the provision of a framework to enable effective development and response to these issues. This might provide the basis for a fruitful action-research initiative.

Finally, it is apparent at both local and national levels that, increasingly, there are difficulties in achieving agreement between members of communities and public authorities in relation to development agendas. This has implications for participation in democratic processes. This relates to work undertaken recently by the O.E.C.D. (2001a, 2001b) regarding the engagement of citizens in policy-making and the development of Social Capital. The application of the Input Output Analytical Model contained in this study might provide a useful means through which to investigate the effectiveness of the planning, development, representative, decision-making and accountability systems at local government levels in particular. Again, this might be a useful subject for an action-research project.

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