

Self as Instrument: Dual Consulting Identities the Evaluator and the Designer

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Abstract

The role of the Organization Development consultant is a supportive role, helping clients determine the source of their issue and to design solutions for change that offer sustainable results. OD consultants can use self as an instrument to achieve this. An effective use of self requires not only self awareness but also the ability to interpret clearly what is going on and take action appropriate to the situation. In this paper we propose that the two distinct ways to utilize self (identities of self) are: as an evaluator and a designer. This experience based paper aims to explore the role of self as an instrument in Organization Development consulting. The paper is divided in three parts. The first part of the paper addresses the evolution of self, answers the question “what is self?” through relevant literature. The second part of the paper will focus on understanding the dual identities from a philosophical and experiential standpoint. The experiential view of the identities is developed from interviews with tenured OD consultants and specifically who have used self as instrument in their consulting; David Jamieson and Edith Seashore. Finally, we offer a framework for OD consultants on how they can intentionally use self as an instrument via the designer and evaluator consultant identities to strengthen their practice.



Introduction

Cheung-Judge (2001) considers use of self as one of the core competencies required for OD practitioners as does the OD Network on their list of core competencies, last updated in 2001. One rea-



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son for this could be that the OD consultant is required to understand the client and the client's environment thoroughly and construct appropriate change interventions. To be skilled at understanding the environment, the OD consultant needs to be involved and observant of the client, their work and the environment. Additionally, there is a need to develop an objective lens and be aware of one's biases, strengths, feelings, and thoughts. The objectivity in these observations requires a skilled depth of self-awareness. An effective use of self requires not only self awareness but also the ability to interpret clearly what is going on and take action appropriate to the situation (Jamieson, Auron, & Shechtman, 2010).

The consultant needs to internalize these skills and put them into practice regularly so that they become a part of the normal way of operating. Given the above, understanding the use of self becomes important in OD practice. The understanding of self originated in clinical psychology which then transcended into other fields including, Organizational Development. The psychoanalysts defined the id, ego and superego as components of self. Jung described self as an archetype called the "mandala" or magic circle which means that self is the center around which all the other systems revolve, it brings all the systems together (Hall, Lindzey, & Campbell, 2004). Moving from instincts and archetypes Adler proposed the importance of "social urges" (Hall et al., 2004) in development of self. He proposed a creative power of self, stating that man has the power to create the self through his heredity and experience in society. A similar perspective was proposed by philosopher George Mead (1934); stating that 'self' is developed and defined within a group; when we are born there is no sense of self thus, self is developed through social interaction. Goffman (1959) also sees the identification of self

to be in the presence of others. His perspective is that there is a role each person chooses to play in society and we know ourselves in that role, consequently that is how others come to know us as well. These two classic perspectives of self are important to our consideration of use of self for the OD consultant, as OD consultants are often in the context of a group and within the larger social structure of a firm.

Additionally, individuals have an innate tendency to grow and develop their self. Humanistic psychologist Carl Rogers stressed the importance of each individual's growth and self-actualization. He also stated that self is influenced by how we perceive ourselves and others. Carl Rogers believed that closer the ideal self to the real self the more self worth a person experiences and that accepting and understanding self helps to reduce the urge to react inappropriately in a counseling setting. Inappropriate intervening suppresses a patient's innate tendency to develop positively (Rogers, 1995) and makes the patient dependent on the counselor. This value of making the client self-sufficient also resides in OD.

Literature on the use of self in the context of OD consulting can be divided into three categories, self in action (the utilization of expertise and awareness) (Curran, Seashore, & Welp, 1996; Jamieson et al., 2010; Seashore, Shawver, Thompson, & Mattare, 2004), maintenance of use of self (Cheung-Judge, 2001; Tannenbaum, 1995) and the pre-action self (our choice of behavior and the construction of reality) (Patwell & Seashore, 2006; Tannenbaum, 1957). The literature on use of self can also be categorized in ontological terms, in what we feel as the realist perspective (Chalmers, 1999) as offered by, Jamieson (2010) and C. Seashore (2004) in their suggestion

of utilizing use of self to discover pre-existing reality and oppositely, the anti-realist perspective as stated by Patwell & E. Seashore (2006) and Tannenbaum (1957), which is a social constructionists perspective (Berger & Luckmann, 1967, c1966) in that reality exists in the mind of the individual and employing use of self to uncover that reality for a client.

The purpose of use of self is to be able to execute a role, in this case the role of the OD consultant, effectively, for others and the organizational system, without personal interference (bias, blindness, avoidance etc.) and with enough consciousness to have clear intentionality and choice (Jamieson et al. (2010). Patwell & Seashore (2006) view the understanding of self as linked with our perceptions of the world around us and our choice of changing our reality prior to taking action and creating change with others. Jamieson's definition focuses more on utilizing oneself according to the external reality (evaluator identity) and the Patwell & Seashore definition emphasizes the internal reality, changing the world as we perceive it (designer identity). Thus, we propose that the two distinct ways to utilize self are via the consultant identities: as an "Evaluator" and a "Designer". Utilizing the Evaluator Self, OD consultants evaluate the client and environment, while with the Designer Self they can make changes to the way that they perceive the environment and shape it.

The contribution that this paper makes is to suggest that these two uses of self, the Designer and Evaluator, due to their distinct philosophical origins are the dual identities of the OD consultant. Throughout this paper we will explore how these identities are often situational; and our purpose for throwing light on these distinct identities of

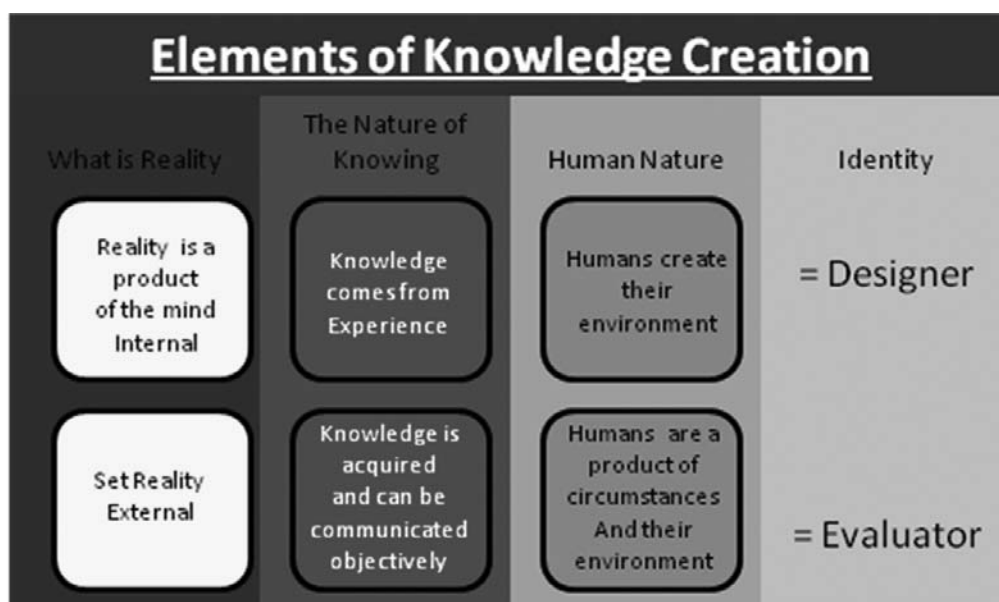
use of self is so that they become utilized with intention by the OD Consultant. A developed appreciation for the foundational assumptions of each identity will assist the consultant in achieving their desired outcome. It is worth noting that our use of the term 'identity' is intended only to reference the awareness and resulting self-identification of the philosophical underpinnings of use of self as the designer and evaluator and that our definition of identity it is separate from the common sociological term 'occupational identity' which refers to one's identification with the work that they do, job title, profession or type of work (Becker & Carper, 1956).

Philosophical Exploration of Use of Self Identities

These dual identities, use of self as the evaluator or designer, are grounded by three elements of knowledge creation, which are fundamentals of philosophy of science. First, is the ontological (what is reality) origins mentioned previously. The second element of knowledge creation is

epistemology (the nature of knowing) the philosophical question of where one believes knowledge comes from. The designer and evaluator identities again split on whether knowledge comes from experience or is communicated/transferable. The designer identity employs a logical-positivist perspective, assuming that knowing comes from having experienced an event. Therefore, the designer identity relies heavily on in-the-moment discovery of knowledge and that to know what is going on with a team or organization that there is a necessary emphasis on discovery of the client's reality (in the mind's eye) as well as their own (experience). The Evaluator identity fundamentally assumes that knowledge can be communicated objectively and therefore the knowledge from confirmed scientific models and theory of the past can be used to predict what is occurring in the present with self and with the client. The third element of knowledge creation is human nature, the primary question is, "are we products of our environment or do we create our environment?" The Evaluator identity assumes that humans are products of their circumstances

Figure1. Elements of Knowledge Creation



and their environment, employing this identity the consultant will focus her time and consulting efforts on collecting data to understand the environment which drives human nature including their own; and the Designer identity assumes that humans create their environment and in utilizing this identity the OD consultant will orchestrate gatherings that enable teams and organizations to explore the reality/environment that they have created. When an OD consultant assumes the Designer identity in a moment of self reflection they will also be exploring what reality they are constructing and determining if the reality he created is aiding him in the achievement of his desired outcome. Figure 1 depicts the combination of elements that comprise each use of self identity.

The philosophical components of knowledge creation are essentially the underlying belief system in action at any moment during a consultant's consultation process. Again, our proposition is not to say that as OD consultants that we have one belief system and not the other but rather that the philosophical foundations are available to all and that it is important to utilize the use of self identities with mindfully by recognizing which belief system (identity) we are operating from and notice if that is an appropriate match for the situation or just our preferred way of operating. Working on yourself, tuning your instrument through reflection and self awareness an essential piece to crafting use of self (Cheung-Judge, 2001; Tannenbaum, 1995), thus it is a routine practice of both consultant identities and will uncover different types of useful data.

Becoming agile in our use of self and alternating between these identities has its advantages both for the consultant and the client. Realizing from

which identity we gathered information about ourselves or about the firm is advantageous because it helps us to keep these observations in perspective and to rely on them appropriately as data points versus the complete picture. This process of how we come to know what we know is a self-reflective practice that is largely influenced by the identity that we were employing at the time of data collection. The awareness of this process of knowing helps us to choose our actions and seamlessly adjust between both uses of self identities. In action research there is a foundational component where the action researcher must step back and understand how learning and knowing occurs within themselves and this is referred to as practical knowing (Coghlan, 2011), this same process, we propose, is occurring for the OD consultant as they observe themselves and the client via the dual identities.

There is a difference worth mentioning between the scientific (epistemological) knowledge mentioned earlier and practical knowing. To clarify, practical knowing varies from situation to situation and place to place, practical knowing is concerned with knowing what it needs for the task at hand, scientific knowing is concerned with exhaustive knowledge, practical knowing is spontaneous, scientific is methodological.

We come to know what we know, practical knowing, by learning at three levels of inquiry (1st person, 2nd person, and 3rd person inquiry) (Coghlan & Shani, 2008; Coghlan & Brannick, 2010). First person inquiry, individual self awareness, one's ability and dedication to observe the inquiry that unfolds within, the observations, questions and ideas formed. Second person inquiry is as an observer of the team; being aware of the dynamics and the data that needs to be

found or analyzed. Finally, third person inquiry is seeing the larger system (the broader organization) specifically the impact of the OD consultant's work on the organization and how the organization is responding to the changes, then taking that data/feedback and folding it back into the analysis and design. By experiencing this process in use of self by way of either identity, learning occurs. This learning enables the consultant to understand him/her self, organization or challenge in a new and different way.

Experiential Exploration of Use of self Identities

These use of self identities, explained philosophically thus far, were derived from a review of the literature and interviews with David Jamieson and Edie Seashore who provided us with a deeper and experienced based understanding of use of self in OD consulting. In this section we chose not to provide full transcripts of our interviews rather, define the major themes of the interviews and understand the differences and similarities in the evaluator and the designer consultant identities through these various themes.

Use of self in Action

Experientially, the use of self consists of three important ideas: 1) Awareness, 2) Continuous learning and monitoring of self, 3) Conscious reactions. Use of self for OD consultants emphasizes the need of awareness while working with clients. It means that consultants must mindfully bring their skills, biases, needs, fears, personality into their awareness while consulting to make the most effective use of self. Second, bringing unconscious elements into the consciousness is an ongoing process because we are learning something new about ourselves every time we interact with

clients/people. Third, the reactions that we give our clients in any situation should be conscious (mindfully chosen) and not spontaneous. It is reducing the spontaneity in behavior and choosing to be more cautious in our reactions is a way of utilizing self as instrument. So, how do we become more self awareness of these dual identities, in other words what tools and techniques should we use to refine our understanding of self and use of self?

Increasing awareness

If we seek to understand the self from the evaluator identity we would use different tools and techniques, such as training programs, personality assessments, group participation, feedback from others etc. OD has primarily used the T-groups as a way of understanding and improving self. All these tools and techniques help increase self awareness and bring to attention to blind spots, biases and strengths. These tools and techniques maintain and enhance the self as instrument, evaluator identity.

Whereas from the designer identity, being aware of one's choices and putting into action our choices to enhance one's experience of reality is an important tool to refine our understanding of use of self. Knowing the intention behind using choice is essential, with this awareness we can impact the situation intentionally through the choices that we make. The situation does not always have to be in our favor but with the right intention we can attempt to avoid having a negative impact on the situation. As an OD consultant, making the right choices to help our clients with their goals is essential to our success; therefore it is critical to focus our intentions so that we act in ways that allow our impact to empower the client.

Timing is another tool that the designer use of self identity is conscious of when considering the important choice of when to intervene and when not to intervene. Timing includes impact and choice; the consultant must decide the timing of the actions they choose and determine which will have the maximum positive impact on the client's construction of reality. Finally, self help books, reflection & experience are also helpful in enhancing and maintaining the Designer identity.

Fine Tuning and adjusting

Fine tuning and adjusting the use of self are equally essential in OD consulting. From the perspective of the designer identity there are three ways of fine tuning the self:

1) Discipline

Discipline means "getting off of automatic and updating the belief system" (Edie, personal conversation). It means we are very spontaneous in our reactions and we need to control these reactions and simultaneously update our belief system about the situation in which we are present. The control and update both require discipline on our part.

2) Support System

A support system which comprises of multiple trusted and valued sources that will provide clear feedback in a way that we can understand and do something about it, helps in refining and adjusting our self.

3) Reflection

Reflecting both in hindsight and in the moment is important for adjusting and refining self.

The Evaluator identity relies more heavily on the situational data available, the two ways of fine tuning self according to the evaluator perspective are:

- 1) Feedback from the situation: The evaluator acknowledges feedback from support system; but the feedback received from experiences in different situations helps mostly in fine tuning self. In most cases, consultant enters a situation with certain blind spots, biases and in such situations the feedback received from the client or the situation itself helps in understanding these biases and blind spots.
- 2) Consequences: A related concept to experience is consequences. The particular consequences of the wrong behavior in situations help the consultant immensely in fine tuning self.

Use of self Context

A final question to consider is whether fine tuning and understanding of self is applicable to all situations regardless of the culture/context? Do we have to fine tune & adjust our use of self in new cultures or are the two identities universally applicable? The perspective of the designer identity would say no because 'choice' is a fundamental aspect of using self in consulting. Therefore, choice which is self directed, is not culture dependent and consequently each person has a choice which can be applied to any situation or culture. A key limitation to the assumption of choice not being culturally dependant is that some people are not aware that they have choices to impact or create their experience. On the contrary, from an evaluator's standpoint, use of self is contextually dependent because the principal feature of using self in consulting from the view of the evaluator identity is 'situation' and situation differs from culture to culture because the data that defines the situation is different. Therefore the OD consultant has to fine tune and adapt

between the dual identities in each culture ‘situation’.

In summary, Designer identity has an agentic perspective towards use of self, which means OD consultants are not mere onlookers of experiences but agents of experiences. They have the choice to act and intervene and make an impact on the client. The Evaluator identity comes from a more positivist perspective which means that OD consultants discover and learn from the situations that they enter and enhance their understanding of self and in the process helps the client in achieving its goals and objectives.

Identity Similarities

The similarities and differences between these two identities are subtle and acknowledging exist-

tence of both offers a wider range of awareness and thus use of self. The dual identities both emphasize the ongoing need for refinement and development. The idea that use of self is intentional and can become even more intentional through development is possibly an inherent perspective of an OD consultant and not necessarily directly attributable to use of self. However, both practitioners in our interviews mentioned the developmental attributes of self and thus we conclude the similarity. Additionally, both described consultant identities view culture as not being a barrier to understanding the concept of use of self; and both identities are equally as useful when considering how the use of self identities influence the actions that the OD consultant takes with the client. Each practitioner experience identified use of self as a way of understanding cul-

Table 1

Designer Identity	Evaluator Identity
“Self is who we are, human beings”	“Self is an instrument”
Definition of Self: Use of self consists of intentional, conscious and deliberate choices which result in actions/behaviors taken to bring about change in the situation. (Seashore et al., 2004)	Definition of Self: Use of self is conscious use of one’s being in the intentional execution of one’s role for effectiveness in whatever the current situation is presenting. (Jamieson et al., 2010)
Self Focused: For example, if you feel that a person is not trustworthy the problem is with you and you should be introspective to understand your expectations	Situation focused: For example, just when you know you have understood how to react in a situation, you will have people who surprise you therefore you need to understand self in different situations and get exposed to multiple situations and experience
Self Awareness: Self awareness is important for making the right choices	Self Awareness: Self awareness is important for understanding oneself and the situation
Choice: Choice is based on a decision you make to shift your reality	Choice: Choice is based on what is needed for the situation
Developing Self: Updating belief system, discipline, support system & reflection.	Maintaining & Fine tuning Self: Feedback to maintain self and control and discipline to regulate self.
OD consultants focus on Self and System	OD consultants focus on Process and Relationship

ture and how we 'show up' in a culture (i.e. country, company, group demographic, or team) different than our own. Being aware of how we utilize self to take in data and evaluate or checking and updating our beliefs based on the culture you are now a part of or in contact with occurs in a similar fashion in both identities

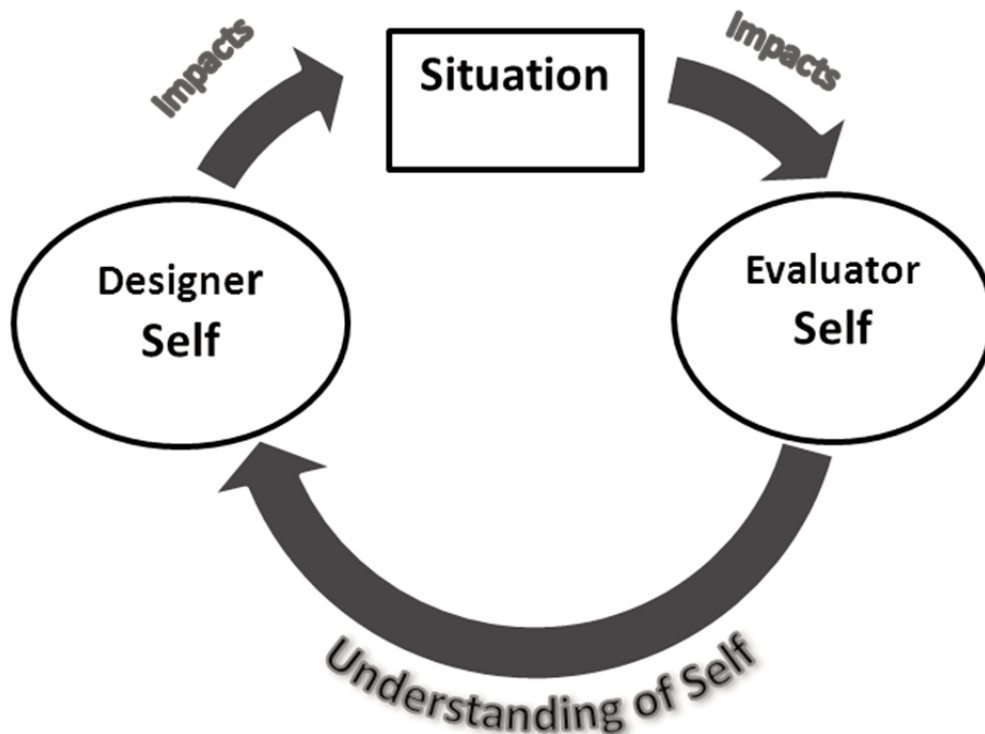
Identity Differences

We have summarized the differences we found in these two perspectives in Table 1.

Dual Identity Framework

Figure 2. Offers another way of understanding the two identities. Designer use of self helps to understand how self can be used to impact the client's situation (prepare) and as the situation changes the Evaluator identity is impacted and utilized to help collect information about the 'new' reality and determine how to best regulate self and utilize knowledge and experience to fit the situation

Figure 2: Dual Identity Framework



(respond). The learning and understanding of self from the Evaluator identity is folded in to the learning and knowledge of self and informs anew the Designer identity of which creates a new reality. The use of self feedback loop continues as we grow and develop in our use and agility of our dual identities.

Dual Identities and the Consulting Process

Peter Block's consultation process (Block, 1981) serves as a well known and basic consulting process to which we further distinguish these identities; each step providing a different vantage point from which to view the dual identities of use of self.

- 1) Contracting: Contracting is the beginning of the consultant's relationship with the client. Contracting includes understanding the needs, expectations and the context of work as well as willingness to work

together. The designer approaches the contract by looking at 'self' and uses self to define the context for the client. The designer provides new perspectives to the client regarding the issue. The evaluator on the other hand looks at the situation and decides whether his/her expertise matches the situation. The evaluator does not try to change the situation nor the client's perspectives; instead he/she tries to learn from the situation.

- 2) Discovery/ Data Collection: The discovery/data collection stage, where the consultant gathers all the relevant information required for the project. The designer tries to stay in the discovery mode and assess the situation. While the evaluator uses all the senses to gather the data from the situation to make sense of the situation. Another dimension that we think could help in understanding the designer & evaluator identities is that designers are intuitors whereas evaluators are more sensors.
- 3) Understanding resistance: In this stage the consultant tries to understand the issue or the resistance that has resulted in the issue. The designer tries to manipulate or maneuver through the resistance employing methods of inquiry that help shift people's perception of reality to minimize resistance; whereas the evaluator collects more data to understand why, how, where the resistance is taking place. The evaluator seeks to understand but does not change the form of resistance.
- 4) Feedback/Decision to Act: The consultant feeds back the data that it has gathered from the organization after thorough analysis. The designer places greater

importance on the sender of the feedback more than the recipient because the way the sender provides the information helps the recipient better understand the sender's reality. The evaluator provides feedback and waits for the recipient's reaction. The evaluator uses the reaction from client to fine tune his/her 'self' and also ensures that the senses have collected the intended data. If there is a need to collect more data evaluator goes back to the data collection stage.

- 5) Engagement/Implementation: Putting the plan in action; the consultant supports the client in the implementation process. The designer identity supports the client by continuously defining the reality during the implementation and the evaluator provides support by utilizing his/her personal expertise that matches the appropriate situation.
- 6) Results/Debrief –The designer makes sure that client has understood and learned from the project. Whereas the evaluator makes sure that the self as instrument was effective in the situation and also uses the learning from project as a way to evaluate and maintain self.

Learning occurs for the designer identity during the contracting stage because the designer begins each engagement with deep understanding of self. In Table 2 we have summarized the above distinctions of the two perspectives. Note that where the learning occurs in each identity is the connector of the dual identities in one consultant and a feedback loop of information exchange.

Table 2

Flawless Consulting Process (Block, 1981)	Designer	Evaluator
Contracting	** Learning Occurs Here** - Look at self - Can he/she help; process that I can utilize expertise - Give new perspectives; influence the client's perspective or view of reality "Anti- Realist" – reality is the product of the mind	- Look at the organization and then decide if expertise matches required consulting - Takes as is and studies it "Realist Perspective" - Reality is set and to be discovered
Discovery/Data Collection	- Discovery - Intuition/Feeling (N/F)	- Data collection - Utilizes senses as data analytics (S/T)
Understanding Resistance	- Learning in dissonance - Managing/maneuvering	- Collect data (Why? Where? How?) - Seek to Understand
Feedback/Decision to Act	- Similar to contracting perspective - Intentional timing of deliver of feedback - Feedback is about the sender more than the recipient - Choices made on which feedback to consider – make your reality	- Similar to contracting perspective - Feedback opportunity to develop or define self –sharpening the saw; maintaining and fine tuning instrument; from the client - Had our instrument collected intended data
Engagement/Implementation	Designed with the intention of creating a new reality	Match and utilization of expertise
Result/Debrief	- Client perspective - Re-demonstration of the behavior in different circumstances; requires constant attention to maintain change - Consultant – Learning is before	- Measuring was the instrument effective? - Consultant – would learn adjust and change from as a result intervention, ** Learning Occurs Here**

Summary

In Summary, we feel that there are 3 ways that the OD consultant can use this information in their own consulting practice.

First, in an effort to build awareness, we would suggest for the OD consultant to conduct a self evaluation to determine if their consultative

approach is of dual identity or if his/her approach predominately resides in one identity over the other. There are benefits to both identities and we suggest that an OD consultant should work towards a blended approach.

Second, since 'self' is a part of all humans not just OD consultants, our clients will also show up in a use of self identity and Table 2 is a short-cut to

observing what identity the client is in and therefore which identity the OD Consultant might need to flex to in order to relate and connect to the client.

Finally, the identity we take as a consultant may be contingent on time. Depending on when we are invited in for consultation, the stage of the project may be at the beginning offering the opportunity to flex between identities or the project may be a “fixer-upper” where an established perspective is in play and it is not always at the discretion of the consultant to or blend identities rather only to continue on the path of one identity already chosen by the client. Again as an informational guide, Table 2 enhances awareness and provides distinguishable characteristics to help with in-the-moment identification of the current use of self identity.

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