THE DELTA CHANGE PROCESS: A MULTIDIMENSIONAL CULTURAL CHANGE APPROACH

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ABSTRACT

This paper develops a new model for organizational change, called the Delta Change Process. This methodology recognizes that change is complex and often viewed with skepticism, and this model considers the various stakeholders in this organizational modification. This new process incorporates elements from a number of previous models such as Appreciative Inquiry, Discontinuous Leap Approaches, Generative Capacity, Cultural Antecedents, Systems Approaches and First/Second/Third Order Transformational Change models. In particular, this model incorporates positive psychological capital practices (as exemplified by Hope Theory and Authentic Leadership).

KEYWORDS: organizational change, Delta Change Process, psychological capital practices

JEL: M1

INTRODUCTION

Creating lasting organizational change is the challenge of facing every leader today, whether in nonprofits, public sector, or corporate environments. In fact, one could make a case that true, transformational change is the *sine qua non* of leadership, and anything less is descriptive of a managerial function (Kotter, 1990; Bennis and Nanus, 1985; Bennis, 2003; Rost, 1991). If the import of change is articulated and identified, and organizations scholars have devoted so much to this subject, then why is change so elusive (Burke, 2002)? One of the key reasons that change is so evasive is that leaders do not adequately emphasize the positive attributes that change brings to an organization, taking into account how change can positively impact the individual, small group, or organizational system under consideration. The *Delta Change Process* synergistically connects various models for organizational change, while considering the emotional impact of these changes on the followers at these various levels.

Burke (2002, p. 13) correctly emphasizes that culture change (i.e., transformational change that occurs within an organizational context) must resonate with the followers' personal values and beliefs, and must connect with "the human forces that either facilitate or prevent transformation" (Duck, 2001). Processes and models provide the structure through which lasting change can occur (Porras & Silvers, 1991; Nadler & Tushman, 1989; Wischnevsky & Damanpour, 2006), while inspired people successfully implement the change (Burke, 1995; Albrecht, 2005; McAllister, 1995; Lee & Allen, 2002). The three critical components of successful organization change implementation centers on (1) leader-follower interactions, (2) effective systems design and structure, and (3) choosing the appropriate change model. The organization of this paper is as follows: In the following section, we will discuss the relevant literature. Next, explanation and clarification of the *Delta Change Process* occurs. Finally, this paper explains the model's systems design and structure. The literature review of change model theory will occur next.

LITERATURE REVIEW

The key role of leadership upon organizational health and effectiveness has been extensively studied (Yammarino, 1993; Jung, Chow, & Wu, 2003; Meyer, Stanley, Herscovitch & Topolnytsky, 2002), and transformational leadership is an oft-quoted approach in the literature (Bass & Avolio, 1990; Lowe &

Gardner, 2001; Kouzes and Posner, 2002). Trust, altruism, empathy, ethical behavior, and other values-based characteristics of leaders are critical elements for building the coalition between leaders and followers (Kanungo, 2001; Kanungo & Mendonca, 1996; Kouzes and Posner, 1995; Bass, 1998; Bass & Steidlmeier, 1999; Greenleaf, 1977; Avolio & Locke, 2002).   This paper will assume that a transformational leader is leading the organization undergoing change, and that there is a positive relationship established between executives and employees. Yet, leaders do not operate in a vacuum, and even the "best" leader cannot affect change if a change model is inappropriate.

When discussing change, vision and mission building meetings come to mind, accompanied by strategic planning goals established for the next three to five years. Realignment to organizational goals and directives occur, and external and internal scanning occurs. Managers often utilize the *teleological approach* (Van de Ven & Poole, 1995), although few managers would identify this process by that name.

Managers can utilize other simple processes.   Practitioners often implement Lewin's unfreeze/move/refreeze method (Lewin, 1951) and Schein's Unfreezing/Changing/ Refreezing three step processes (Schein, 1987) because of the simplicity and applicability of the concepts. While these three steps are alluring to graduate students and to consultants because of their comprehendible components, these stages are actually quite intricate and sophisticated when delving into the specifics of these steps.

Perhaps the most popular representation of change models are the diagrammatic paradigms, such as the Burke-Litwin model (Burke, 2002) and Nadler-Tushman congruence model (Nadler & Tushman, 1980). Replete with boxes, double-headed arrows and circuitous loops, these models take complicated interactions and illustrate their functions. The *Delta Change Model* adds one more model to the literature.

Before delving into the model itself, a couple of comments regarding the uniqueness of this model are in order. There are three areas of distinctiveness. In the first area of distinctiveness, the *Delta Change Model* incorporates the Hope Theory (Snyder, 2000) as well as the developing area of *positive psychological capital* (or *PsyCap*) which focus on constructs such as hope, resilience, optimism and efficacy (Luthans, Avolio, Avey, & Norman, 2007). The organizational culture adopts these affective factors, providing the impetus and sustained enthusiasm to initiate and continue the change (Luthans & Youssef, 2004). Many change systems do not examine the emotional aspects of employee engagement; yet, this may be *the* most critical factor in determining whether a change model successfully transforms an organization.

Second, the next area of distinctiveness is found in the inclusion of *cultural antecedents*, which focus on those qualities that each individual brings into the organization, such as ethnic background (Dorfman, Hanges, & Brodbeck, 2004; Rosen, Digh, Singer, & Phillips, 2000), gender (Garcia-Retamero & Lopez-Zafra, 2006; Eagly & Karau, 2002), and spirituality (Zohar, 2006; Neck & Milliman, 1994; Garcia-Zamor, 2003; Wagner-March & Conley, 1999). Leaders and consultants largely ignore these antecedents due to the political sensitivity of these issues, yet they are critical for the success of all organizations.

The final area of distinctiveness focuses on a multi-level approach (Dansereau, Yammarino, & Markham, 1995; Waldman & Yammarino, 1999), examining the impact that the upper-, middle-, lower-level management, and team members have on the change process. More specifically, this is a levels-of-management phenomenon (Waldman & Yammarino, 1999; Hunt & Ropo, 1995).

This multi-level approach is tied into organizational transformation and its resultant performance (Wischnevsky & Damanpour, 2006), and recognizes that change must occur among individuals, dyads, teams, groups, and entire systems. At the most elemental level, individuals, dyads between supervisor and subordinates, and small teams must undergo change. These identified modifications are *first-order changes* (Kimberly & Nielsen, 1975).

Companies hire consultants or executive coaches to mitigate a problem with a small unit, such as with a dysfunctional team or a derailing individual. These changes, while important, are usually insular and somewhat segregated from the overall organizational structure. When the organization monitors and address these episodic changes, these incremental modifications can have far-reaching effect into the larger system. For the most part, first-order changes are discontinuous and driven by external factors (Weick & Quinn, 1999). See Figure 1, below.

Figure 1: Schematic of First-, Second-, and Third-Order Change Designations
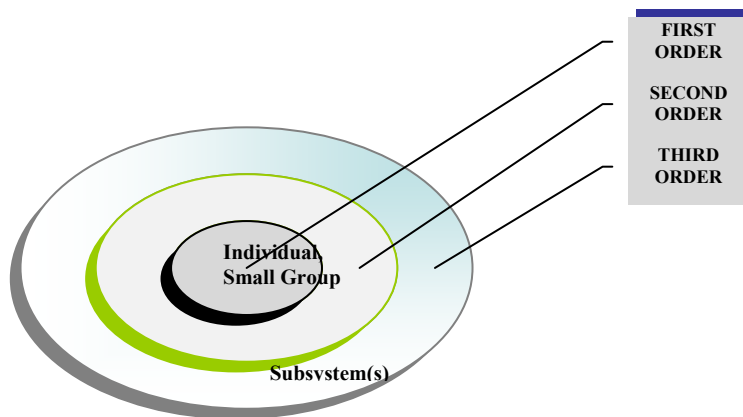
This diagram depicts the relationship between orders of change. The first order change occurs with small groups or individuals. The second order change involves subsystems, such as departments, divisions, or large multi-functional bodies. In addition, the third order change impacts the larger system, and ultimately the entire system.

Second-order changes transform the organization at a deeper level, where change is more continuous and perpetual (Weick & Quinn, 1999; Watzlawick, Weakland, & Fisch, 1974). The target of such change processes is a subsystem or subsystems in an organization (Burke, 2002). These changes are ongoing and self-initiating, and have far-reaching effects within the organization. It is planned, strategically implemented, and deliberate (Porras & Robertson, 1992).

A *third-order change* affects the entire system. Multiple factors are identified and examined, and the interaction of these factors are understood "in some causal sequence toward an ultimate goal" (Burke, 2002, p. 106). Other researchers (Waldman & Yammarino, 1999; Klein, Dansereau & Hall, 1994) have used the more descriptive terms of *mixed-determinants models* or *cross-level models,* depending on the independent and dependent variables examined. In all cases, this level addresses systemic, macrocosmic change, and affects the organization as a whole.

With this background in mind, it is now time to describe the actual model itself, with its component parts and various processes.

THE DELTA CHANGE PROCESS MODEL EXPLAINED

As was mentioned earlier, organizational change oftentimes utilizes Lewin's three-step model. This is not merely due to its simplicity, but because Lewin uncovered the fundamental element of change. Weick and Quinn (1999, p. 363) describes Lewin's insightfulness in this way:

> Lewin's (1951) three stages of change-unfreeze, change, refreeze-continue to be a generic recipe for organizational development. As Hendry (1996) notes, "Scratch any account of creating and managing change and the idea that change is a three-stage process which necessarily begins with

> a process of unfreezing will not be far below the surface. Indeed it has been said that the whole theory of change is reducible to this one idea of Kurt Lewin's."

O'Toole (1995) identified 33 reasons why change is resisted, and every organization faces one or more of these deterrents whenever a change initiative is launched. One of the reasons why executives may be hesitant to include key constituents in change discussions is that these dialogs can quickly degrade into grousing sessions. One of the ways to create a positive milieu in a change process is to utilize the *positive psychological capital* approach (Luthans & Avolio, 2004; 2007). Organizational citizenship behavior, humor, self-determination, and other affects (Luthens et al., 2007) are incorporated within this positive psychological capital approach, and are integrated into the Delta Change Process model.

This model first utilizes *Appreciative Inquiry* to begin the change dialog with the key constituents in the organization (Bushe, 1995; Cooperrider, 1990). Ideally, the change team is comprised of people who are open to change (known as *champions*). These champions do not have to be strong advocates. If fact, it would be advisable to have a few "naysayers" in the discussion, because their views may represent the views of other cynics among their associates. There are just two caveats to consider: (1) The naysayer must be reasonable (that is, rational arguments will abate cynicism), and (2) this naysayer must have a wide network of contacts within the company (affecting change throughout the company). These champions from all levels of the organization will be the nucleus of the transformative process.

One upstart entertainment company looked to create its own new culture while integrating employees from other studios. The approach suggested by the consultant was to discover the meaningful values and characteristics of the previous studios, and to meld them into the new culture whenever advisable. This approach created optimism throughout the company, and people became excited about the possibilities. Appreciative inquiry is a wonderful inaugural tool because it challenges participants to identify those factors that resonate with the emotions of the individuals.

In this first phase, if an organization is dysfunctional, it may need to address some first-order concerns before moving on to second and third-order processes. For example, if a leader is arrogant, critical, alienates people and micromanages, then executive coaching or other rehabilitative means might have to be employed before anyone in the company will trust his or her leading (Gravenkemper, 2002). In addition, if the organization is cynical, critical, and disillusioned, then trust needs to developed (Driscoll, 1978; Kouzes & Posner, 2002). After addressing the dysfunction and establishing trust, the champions can move onto the next phase.

In the *Discontinuous Leap Approach*, the champions envision an innovative organizational culture, structure, and procedural model so that they create a new reality. This activity goes far beyond appreciative inquiry in intent. Frantz (1998) explains that the goal is make a quantum leap from old presumptions, protocol or practices, and to create an entirely new reality. Established paradigms, norms, and ideologies are to be disregarded and discarded, and a never-before realized existence would come into being.

A word picture that Frantz (1998) provides in illustrating the *Discontinuous Leap Approach* has to do with Columbus' explorations in 1492. Columbus had to overcome the barriers that he faced (uncharted waters, unknown foreigners, and unimaginative obstacles). Columbus had to overcome the old assumptions and navigational norms that existed at that time, and set out for uncharted territory. When Columbus overcame his (and his crews') fear of the unknown, they discovered new lands. This would never have occurred had Columbus remained in the safe confines of his homeland.

Frantz also notes that fear of the unknown may paralyze change agents, and that anxiety barriers could prevent change from occurring. Senge's work regarding *mental models* (2006) is most helpful here.

Figure 2: The Delta Change Process Displayed

Appreciative Inquiry	Discontinuous Leap Approach	Generative Capacity	Cultural Antecedents	Evaluate & Redirect
Recruit change champions at various levels	Champions are directed to dream outrageously	Champions create a new story	Champions inquire about others' culture	Champions reexamine the morale
Identify the strengths of the organization	Oftentimes anxiety must be addressed	Artifacts and archetypes are created	Asking if cultural values are considered	Productivity & Organizational *Spirit* are noted
Key question: In what areas are we exceptional?	Key question: In what ways could we become extraordinary?	Key question: What is the soul of the organization?	Key question: Are cultural values & beliefs noted?	Key question: Is the organization transforming?
Key focus: Retain those positive traits	Key focus: People identify idealized future	Key focus: Inspire people's hearts	Key focus: Being inclusive to the spirit of the individual	Key focus: Look to redirect if necessary

This figure shows the key phases of the Delta Change Process Model. The key phases are identified: (1) Appreciative Inquiry, which identifies the strengths of the organization; (2) Discontinuous Leap Approach, which imagines an idealized future; (3) Generative Capacity, which creates a new "story" for the organization; (4) Cultural Antecedents, which examines representative cultures; and (5) Evaluation and Redirection, which critiques the transformation at the first, second, or third order change levels.

Senge observes that those insecure or threatened leaders can subvert transformational change, and identifies the main culprits as:

> Control-oriented managers who are threatened by new levels of openness and candor; delays in metrics that show costs of changes but take time to show benefits; polarization and competition between converts to a new way of doing things and people trying to conserve mainstream culture; and fragmented management structures that thwart relationship building among different groups of innovators (p.98).

It is at this point that an *authentic leader* can provide valuable direction (Luthans & Avolio, 2003; May, Chan, Hodges, & Avolio, 2003). The *authentic leader* brings a caring and engaged disposition to the dialog, and focuses on strengths and not weakness. S/he can help facilitate the process of dreaming great dreams, like successfully landing a man on the moon, or eliminating Apartheid. They encourage their people be creative, pursue the impossible, and provide resources for success. These leaders jump curves.

The third phase is the *Generative Capacity* phase. The purpose here is to create a new story for the company. Snowden's (2005) *Narrative Causality Theory*, creates and/or reconfigures the main characters in the story. Anecdotes move peoples' hearts, and these stories can take on legendary status. For example, people describe Herb Kelleher at Southwest Airlines as a humble servant-leader, who would take the time to hug people when he saw them in the hallway, personally tended to some disgruntled ticketing agents in a distant city, and allowed employees to help fellow Southwest Airline hurricane victims on company time. In fact, Kelleher voluntarily paid for vans to transport those employees to the hurricane victims damaged homes. An anecdote like that lays a foundation of servant-leadership throughout Southwest Airlines, and becomes part of the fabric of that organization.

In the case of Southwest Airlines, these stories emerged out of Kelleher's leadership. However, *narrative causality theory* directs organizations to create a new story. In *narrative causality theory,* creating the story (known as the *artifact*) is the goal. The facilitator instructs change champions to write down leadership characteristics on a post-it note, and then place these post-its on a board. A clustering process categorizes similar characteristics, labeling these categories (e.g., the *benevolent boss* or the *wise sage*). The group decides on any additional characteristics that they would expect to see in this mythical individual (called an *agent*), as well as remove any undesirable traits. These *agents* are then weaved into a story, and that story becomes the "vision" for the organization.

In one study on female executives, the women interviewed wrestled with the notion of gender issues and leadership (Takamine, 2008). The women executives were entering uncharted territory, and creating an *artifact* or new story for their predecessors. Some female executives felt that they had to behave as men behave, while other women believed that they could create a new model for leadership in their organization. The latter group of women was creating a new story for themselves and those promoted after them.

It is not enough to come up with a new *agent*, however. This agent must be the lead in a comprehensive story of how the organizational culture will change, presumably for the better. An effective story must touch the emotion in some way, bringing hope (as with *Hope Theory*, Snyder, 2000), inspiration, challenge, or excitement. As Snyder (2000) indicates, a company's narrative can positively affect profit margin, retention, organizational citizenship behavior, and commitment. The rewritten story must elicit a positive response from the listeners.

The fourth phase examines the *cultural antecedents* of an organization. As was mentioned previously, the issues under consideration are ethnicity, gender, nationality, age, sexual preference, spirituality, generational status. This is where an organizational change initiative can easily fail.

More companies are becoming more open to matters of spirituality in the workplace, for example (Neck & Milliman, 1994; Garcia-Zamor, 2003). This used to be a taboo subject, but more and more companies are allowing workers to celebrate their spirituality and/or religion in the corporation, as long as it does not become a distraction or a contentious activity. The same holds true for embracing other multicultural aspects.

For example, the ancient Hawaiians' concept of *ho'omanamana* relates to the life force of the ancient Hawaiians, similar to the *Chi* in Asian philosophy (Carruthers, 2007). This speaks of health and wellness, and denotes spiritual power. When a community (*Ohana*) was at peace with itself, it functioned at this high level. If there was trouble (*pilikia*) recognized within the community (*Ohana*), the *kahuna* (traditional healer) restored the *Ohana*. This process of restoration is *ho'oponopono.*

Imagine that there was any ill-feeling or dysfunction from the chiefs (*ali'i*), or wise elders (*kapuna*), a ritual healing would occur to rid the group of the *hala* (transgression) and *hihia,* or negative energy (Coates, Gray, & Hetherington, 2006). The *kahuna* asks the affected parties to share any feelings, or *mana'o.* Then all affected parties ask for forgiveness from the *mihi*, or wrongdoing. The final closure (*pani*) occurs when the relational bonds are reestablished, *aloha* (health) occurs*,* and the final prayers are recited (Coates, Gray, & Hetherington, 2006).

In the modern context, if there are any problems with the executives (*ali'i*), the people with seniority (*kapuna*) or experts (*kahuna*), much damage could occur. The gap between ho'omanamana and disharmony is harmony, balance, and forgiveness (*kala*). The ho'oponopono (change) process bridges this gap.

In a Hawaiian cultural context, this understanding would be critical. Similarly, Christianity, Judaism, Islam, Atheism, multi-generationalism, gender differences, sex roles, etc. would play a critical role in the work milieu when considering change. The impact of a person's values and beliefs are important in bringing positive psychological capital to an organization. The goal is to create an environment where every group feels included and valued. This restoration must consider a person's core values.

The *Cultural Antecedent* phase of the *Delta Change* Process might be the most critical aspect of the model. Leadership team members (or champions) rarely discuss such sensitive issues like gender, age, spirituality, ethnicity, etc., but these issues significantly influence the success or failure of any change process. In a Fortune 100 space technology company, training occurred which attempted to advance mid-level Asian Pacific American managers into executive advancement. In the course of a discussion, the question arose regarding the composition of the executive committee. The trainer asked the participants, "Has there ever been an Asian Pacific American CEO?" The answer was, "No." The next question was, "If you could imagine that the next CEO was Asian Pacific American, what traits/talents/persona/ethic you would expect this individual to have?" The responses were very enlightening. For some, she was a woman. For another individual, it was a male that was around 5'6." These images ran counter to the picture of the executives on the company website. For the first time, these Asian Pacific Americans could imagine becoming a CEO of a major technological giant, where they could never have imagined such a possibility before.

Finally, the last phase periodically *evaluates and redirects* the change process. At prescribed intervals (e.g., one month, three months, six months, one year, etc.) the change champions would take the "pulse" of their coworkers throughout the organization, and report on progress, decline, anecdotes and casualties. The *Delta Change Process* Model does not to operate in linear fashion, as depicted in Figure 2, but in a more circular pattern, as in Figure 3, below.

CONCLUSION

Change processes have often neglected the most vital ingredient for true transformation: the people. Executives and researchers emphasizing non-affective, rational approaches often discount the feelings of their people because these feelings are difficult (if not impossible) to control. However, these psychological and emotional dynamics are, perhaps, the key differentiating factor in determining whether a change process becomes a temporary anomaly within an organization's life cycle, or whether it becomes a transformative experience.

This paper described *The Delta Change Process* and its component parts, including *Appreciative Inquiry, Discontinuous Leap Approaches, Generative Capacity, Cultural Antecedents,* and *Evaluation and Redirection. The Delta Change Process* identified Hope Theory, Systems Thinking, Authentic Leadership, etc. as the theoretical foundation for this model. Utilizing this process, organizations can prescribe and strategically implement transformational change, while tapping into the positive psychological capital of the organization.

Figure 3: Cyclical display of the Delta Change Process
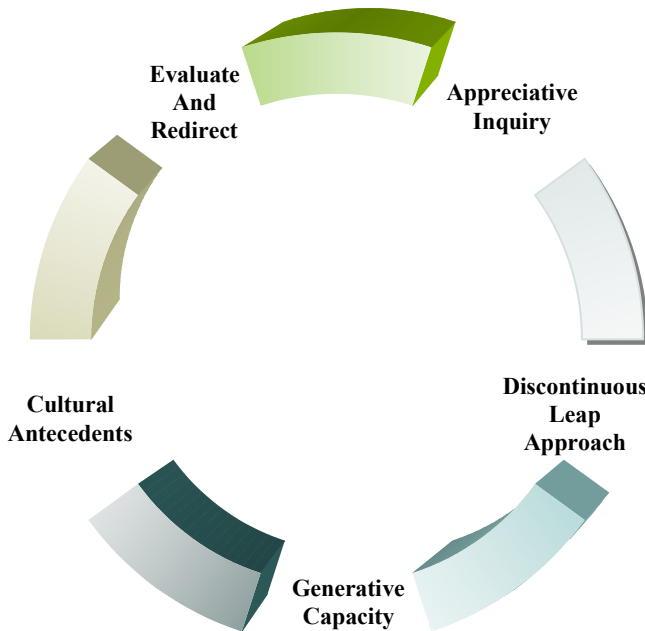
This diagram demonstrates the cyclical nature of the Delta Change Process. This cyclical approach denotes the practical dynamic of the Delta Change Process, which may revert to previous stages or skip stages during the change process. As the system encounters new changes, modifications in the various phases will emerge.

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