

Mainstreaming OD in HIV & AIDS Workplace Interventions



Report of Workshop for OD
and HIV & AIDS mainstreaming practitioners
held in Moshi, Tanzania, 11-14 April 2010



EASUN SUPPORT FOR CIVIL SOCIETY INSTITUTIONAL DEVELOPMENT

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CHANGE MANAGEMENT CONSIDERATIONS TOWARD COMPLIMENTARY INTERVENTIONS

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HIV/AIDS Mainstreaming and OD

HIV & AIDS mainstreaming will take place in contexts that are already extremely messy in terms of organizational development questions related to governance. That, together with the complexity of HIV & AIDS itself suggests that HIV & AIDS mainstreaming is very likely to be shed off where attempts are made to graft it simply as an administrative programme. Mainstreaming will need to be accompanied by powerful interventions for creating and sustaining the necessary sense of urgency and capacities for keeping people focused on adapting new policies and practices.


**EASUN workshop
Moshi, Tanzania, 12 – 14 April 2010**

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This report captures an important institutional development intervention of *EASUN Centre for Organizational Learning* Arusha, Tanzania, May 2010

Footnotes in the document have been added editorially to clarify complex concepts in OD and HIV & AIDS mainstreaming practices

EASUN creates spaces within which individuals, groups, organizations and communities creatively learn to build a better history and new ways of thinking about and taking ethical action to transform lives and livelihoods

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Mainstreaming OD in HIV & AIDS workplace interventions

0. Introduction

0.1. IMPORTANT QUESTIONS AND CURRENT INTENT

Fifteen practitioners in the fields of OD and HIV & AIDS mainstreaming met in a workshop with a two pronged purpose: 1) to heighten awareness of how HIV & AIDS are affecting the performance and development of organizations; 2) to examine how OD can add value to HIV & AIDS mainstreaming work through its unique tools and processes for strengthening organizational adaptive capacities.

The workshop was organized by EASUN from 12 – 15 April in Moshi, Tanzania, with the intent of starting a conversation between HIV/AIDS mainstreaming experts and OD practitioners. Participants were OD practitioners and HIV & AIDS mainstreaming experts from Kenya, Tanzania and Uganda.

In EASUN's view, the challenge for this particular workshop was more for OD practitioners to learn about what is involved in mainstreaming and examine how OD might add value, in view of its unique tools and competencies in transforming organizational practices. The workshop was therefore planned to involve 80% OD practitioners and 20% mainstreaming experts, who mainly played a critical role as a resource for highlighting experiences, stories and current approaches in actual mainstreaming practice today.

The workshop was facilitated by a non-OD practitioner. This was a deliberate effort to seek the emergence of questions that OD people needed to familiarize themselves with in order to engage effectively in dialogue with the mainstreaming practice. The varied experiences of individuals in the HIV & AIDS field itself was also particularly useful in the direction of confronting OD practitioners with new types of questions, and new lenses.

Some of the things that the workshop helped clarify included

1. The scope of HIV & AIDS in workplaces,
2. The language of mainstreaming practice,
3. The meaning of OD and key principles in the practice,
4. The case for and arguments against mainstreaming,
5. What is HIV & AIDS asking of organizations in terms of appropriate response;
6. What is HIV & AIDS in organizations asking of OD today!

Ultimately, it was EASUN's hope that the workshop would lead to mutually reinforcing relationships between those who work specifically as mainstreaming experts, and OD practitioners, who focus on a broader scope of complex issues in organizational development situations.

0.2. MAINSTREAMING AND DEVELOPMENT QUESTIONS

Looking at the intensity of HIV transmissions today and how AIDS is likely to impact the capacities and purposes of organizations, it has become necessary to consider how OD might add value in creating awareness and generate organizational will to respond effectively and in a sustainable manner.

From the sharing in the workshop it emerged that the external push for mainstreaming is currently quite strong, particularly in terms of availability of financial resources and other forms of activism. This very point poses critical *change management* questions with regard to sustainability of changes introduced through mainstreaming work. The point that was repeatedly underlined by different OD practitioners participating in the discussions is the overriding concern of OD about change management as a necessary capacity for both practitioners and organizations. An effective OD intervention therefore largely rests around “handling resistance.”

The lingering question about how mainstreaming can be made to achieve the best for which it is intended, focused the workshop’s attention toward exploring interventions likely to motivate organizations to sustain interest and implementation of modified policies and programme profiles, as well as generate their will to transform dominant organizational cultures and their associated practices.

It is EASUN’s intention to continue with this trajectory. Future workshops and follow-up activities will seek to strengthen complimentary roles of OD and mainstreaming activities in strengthening capacities of organizations to work effectively with emerging issues such as HIV & AIDS, especially through transformation of governance practices.

Indeed, one of the anticipated outcomes from the workshop is the possibility that a good number of HIV & AIDS mainstreaming experts may become more exposed to or equipped with skills related to organizational culture transformation.

0.3. WHAT DOES OD OFFER?

As indicated above, the heart of the workshop was to examine questions that are related to practice principles in OD work, for instance, “to what extent **should the reality of HIV & AIDS change the basic intervention approaches of OD in organizational situations?**” The answer to this question may seem rather obvious to non-OD people. However, OD practitioners have to bear specific practice principles in mind. The workshop provided a good platform for the necessary illumination, particularly how **OD works through exploration and clarification of questions of the client situation in order to generate responsibility-taking, ownership and commitment to new action-steps**. In the process, the client sees its real questions, and energy is generated to transform organizational practices that are needed to support change.

The discussion of what the intended collaboration is asking of OD is presented in much more detail in section 4.3. of this report.

0.4. OUTCOMES AND WAY FORWARD

The overriding question for the workshop was how HIV & AIDS mainstreaming experts and OD practitioners might effectively work together in the future. Points 5 and 6 in the above list of what the workshop helped clarify paved the way for considerations of a way forward and next steps toward scaling up dialogue, collaboration and exchange of tools and techniques. Ultimately, the workshop was successful in exploring what needed strengthening in both OD and mainstreaming practices, so that organizations in East Africa can get the best possible out of the them.

Specific areas of planned action include incorporating examples of HIV & AIDS in OD survey tools, As well as fast tracked training of HIV & AIDS mainstreaming experts in the use of selected OD tools for intervening at organizational “will” level and culture transformation. EASUN expressed its readiness to undertake such a review of tools, as well as to possibly pilot a training course for HIV & AIDS mainstreaming practitioners.

Section 5.2. of this report highlights the way forward discussed at the end of the workshop, including three specific next steps that EASUN will embarked on immediately. Commitments and initiatives of other OD Associations working in partnership with EASUN are presented in the appendix.

EASUN

Arusha, 07 May 2010

I. What is HIV & AIDS asking of organizations?

Workshop discussions opened with a quick glance at important questions for mainstreaming and OD, as well as a brief examination of likely complementarity between mainstreaming practices and OD as a process of fundamental change in an organization's culture.

It was noted that committed and sustainable implementation requires that organizations nurture an interface of change in policies, or activity profiles, with transformation of practices at the levels of culture, values, relationships, processes and leadership. Dysfunctions in existing relationships, for instance, or other practices that sustain conflict, are likely to diminish possibilities for organizations to successfully implement policies that would minimize the impact of HIV & AIDS in the workplace.

Two questions were suggested as being helpful starting point toward understanding the likely relationship between OD and HIV & AIDS: *1) what is HIV & AIDS in the work place asking of organizations? 2) what is likely to influence an organization to feel or see that it has to mainstream HIV & AIDS?*

A quick review of experiences highlighted the unhelpful tendency of organizations to manage change as knee jerk reactions at crisis points. It was noted that organizations need to develop the ability to initiate new ways of doing things while still on the upward (youthful) trend in its growth, i.e, before reaches the plateau of maturity and complacency specific ways of doing things. Many organizations reaching this point before introducing new ways tend to go into a deep slide toward collapse. It was particularly emphasised that organizations need to develop change management or adaptive capabilities if they are to sustainably implement new policies and practices likely to reduce their susceptibility to HIV infection and vulnerability to the impact of AIDS.

2. Organization development in the context of HIV & AIDS

2.1. METAPHORIC EXPLORATIONS: EXAMPLE OF INTERVENTIONS THAT HELP ORGANIZATIONS SEE THEIR REAL QUESTIONS

Activities of any strategically competent organization is clearly influenced by the nature of changing needs and circumstances in its environment. Some of these are normative, while others can negatively affect both its productivity and ability to move in the direction of its essential purpose. HIV & AIDS are one such influence that can disrupt an organization's ability to sustain effectiveness in its chosen direction.

A particular exercise helped participants look deeper into how different internal and external forces affect the development of organizations.

WORKING WITH IMAGES TO DEPICT WHAT HELPS OR HINDERS DEVELOPMENT IN ORGANIZATIONS (Group exercise)

Draw an organization as a tree. Characterize the organic development stages of the tree and translate this to communicate what you think was happening from yr 1 – 10. These should be clear milestones of your organization's development within that time period. The roots of the tree may reflect the vision, mission, idea, values of the organization. Continue to draw the tree and characterize it in terms of what can affect its growth, or what it can do to overcome specific threats to its development.

2.1.1. Metaphors characterized and interpreted

Each group shared tree images and how they had characterized them, as follows in the table below:

GROUP 1	GROUP 2	GROUP 3
<p><i>Org. Capacity building</i></p> <p><u>Metaphor:</u> Improved mango variety grafted on a single branch of a mango tree.</p> <ol style="list-style-type: none"> 1. Demonstrated openness to receiving and working with new ideas or challenges in the interests of sustaining results needed by local communities 2. Grafting of a mango branch on a mango tree suggested continuity of identity while producing better quality fruits. 3. Implied transformational leadership practices in organizational settings 	<p><i>Org. Forum for CSO Voice</i></p> <p><u>Metaphor:</u> Huge tree canopy full of leaves and flowers only. No fruit.</p> <ol style="list-style-type: none"> 1. Organization responding to too many external demands on its space and activity profile 2. Ongoing modification of activities and policies driven by donor proactivity and local competition. 3. New policies or activities (including HIV & AIDS) implemented as incidental projects 4. Implies leadership lacking in confidence and creativity. 	<p><i>Org: ...</i></p> <p><u>Metaphor:</u> Thick tree canopy. Not penetrated by sunlight</p> <ol style="list-style-type: none"> 1. Excess capacity in an organization growing too fast to respond to different changes in programme opportunities. Revolving door-- people coming in and dropping out 2. Currently only one branch is bearing fruits and that is HIV & AIDS mainstreaming. 3. Leadership looks only to benefits from the external environment.

The discussion of images generated particularly revealing conversations about questions related to OD and institutional development, with some specific practice implications for HIV & AIDS mainstreaming, including:

- **Form and function:** to what extent can organizations effectively develop new attitudes and behaviour based exclusively on policy change or activity profile modifications?
- **Identity:** In what ways are project or administrative level experiments likely to influence changes in leadership practices and strategic management of organizational identity?
- **Purpose:** Evolution of organizational purpose.

The above points were broadly reflected in a brief discussion as captured below:

2.1.2. OD and organizational purpose

Each organization has a purpose, which is based on its roots (characterized by stated values, vision and mission). As an organization considers changing its practices in order to adapt to a changing environment, it is important to recognize what is essential, or so precious and central to its identity and capacity that it must be preserved.

2.1.3. Identity, levels of intervention and an organization's capacity to manage change



Knowing and respecting the original purpose of an organization makes possible effective interventions that enable adaptability or change to new activities or organizing principles, while bringing the best of its history into the future.¹

It was noted that OD works with bottom up approaches that enable an organization to generate its own evidence of the need for change, particularly through the use of local knowledge and experiences as building blocks for creating awareness, responsibility-taking and improved action at various levels.²

On the other hand, evidence based on the top-down experiences or knowledge of the expert can only influence compliance at the levels of policy and procedure, but do not have the generative, reparative or healing capacities to create motivation for change at the levels of culture, relationships or leadership practices that support transformation of attitudes and behaviour.

¹ See "Leadership in a (Permanent) Crisis" by Ronald Heifetz, Alexander Grashow, and Marty Linsky, in *Harvard Business Review*, July-August 2009. Harvard Business School Publishing Corporation, Boston, pp. 62-69

² OD processes are based on the pedagogical premise that participatory engagement and collective reflection on experience do expand and even create knowledge while at the same time serving to improve practice (see for instance, "The Practice Turn Away: Forty Years of Spoon-Feeding in Management Education", by Joseph A. Raelin, in *Management Learning: The Journal for Management and Organizational Learning*, vol. 40 no 4, September 2009, Sage Publications, pp. 401 – 409.

2.1.4. Implications for HIV & AIDS mainstreaming

The discussion's implications on HIV & AIDS mainstreaming was illustrated by an example from Uganda where many organizations encouraged to formulate HIV/AIDS policies ended up not putting them to any use. In these situations, the mainstreaming process had not included interventions that were likely to enable the organizations see their real questions related to HIV & AIDS in the workplace.

2.2. HOW PARTICIPANTS EXPERIENCED THE EXERCISE

Each tree image had offered a unique experience, including the group's perception of how emerging issues such as HIV & AIDS can affect an organization's growth and its ability to manage change effectively. Feelings shared by participants in terms of how they had experienced the exercise included:

- **Challenged:** The exercise induced creativity and inclusivity as values to work consciously within group dialogue and decision-making. It offered an opportunity to practice relevant transformational leadership capacities such as facilitating participative engagement and active listening in order to come to shared purpose.
- **Enriched:** It was an engaging process that demanded active listening for the group to come to a common understanding. The exercise was also extremely informative with regard to questions and the range of strategic decision possibilities that organizations are confronted with in their various transition and change processes.
- **Engaged:** The images had provided real life stories of organizations, which made the sharing exciting and extremely informative, particularly with regard to what organizations go through in their development journeys.

At the same time, working with metaphor as an intervention toward seeing the questions of an organization³ appeared to be a new experience for some participants. Some individuals expressed feelings of **uncertainty**, particularly with regard to whether exploring such images would lead to the results for which we had come to the workshop. To what extent was there direct linkage between organizational growth questions and HIV & AIDS in the workplace, and how might we get to this connection through exploring the lives and characters of trees? Such feelings of uncertainty caused others to wonder whether they had indeed understood the group exercise.

³ "If I had an hour to solve a problem and my life depended on the solution, I would spend the first 55 minutes determining the proper question to ask, for once I know the proper question, I could solve the problem in less than five minutes." (Attributed to Albert Einstein—see "The Art of Powerful Questions: Catalyzing insight, Innovation, and Action, by Eric E. Vogt, Juanita Brown, and David Isaacs. Published by Whole Systems Associates, Mill Valley, California, www.theworldcafe.com).

2.3. ORGANIZATIONAL IMAGES AND LESSONS LEARNT

Each of the three trees shared by the work groups provided a unique experience of organizations. The ensuing discussions led to three main lessons related to change management, HIV & AIDS mainstreaming, and organizational resilience:

- Transformational leadership and innovativeness are essential capacities that are likely to enable organizations to manage change effectively and therefore adopt their organizational practices to the challenges of HIV & AIDS;
- Openness enables organizations to take in new ideas (grafting), which allows the possibility for new types of fruit (impact), organizational continuity and increased value creation through networking.
- Organizations, being complex systems, require that policy and procedural development are closely accompanied by interventions that surface current practices that fundamentally contribute to the dysfunction or destruction of the organization when they remain unconscious.⁴

A particular insight underlined from the above new learning was the fact that HIV & AIDS mainstreaming interventions need to be supported by deep change processes facilitated by competent OD practitioners, or mainstreaming experts with additional competence in the use of selected OD tools. In the current situation, sustainability or effectiveness of mainstreaming is likely to be constrained by the incidental nature of the activity, which tends to be associated with short time frames and experimental nature of project funding.

It was noted that expansion or modification of policies and procedure as purely rational problem solving is often an extremely top-down approach which provides few possibilities for the local (client) situation to see what it needs to develop or change at the levels of relationships or organizational culture.

One work group, in the metaphoric exercise above, presented a tree whose growth had ended at the flowering stage only, without any realistic possibility of bearing fruit. As it was explained later, the organization characterized by this particular narrative was, among other things, getting 'choked' as it progressively took on activities that were similar to those carried by its members. It also hosted activities of a wide range of stakeholders, including various big donors who were extremely proactive in shaping its purpose and direction. Such unconscious or passive management of identity was leading to self-defeating competition in the local situation and loss of support from the organization's own members. Depicted metaphorically as a tree, it was as if its mission statement was simply "to develop a beautiful canopy for shade and rest." Further examination of the image led

⁴ See any readings on "the shadow", "organizational shadow", and "shadow work", such as: ZWEIG, Connie and Jeremiah Abrams –eds- (1991) *Meeting the Shadow: The Hidden Power of Human Nature*. New York: Penguin Putnam Inc., DE QUINCEY, Christian (2009) *Consciousness From Zombies to Angels: The shadow and the Light of Knowing Who You Are*. Rochester, Park Street Press; JOHNSON, Robert (1991) *Owning Your Own Shadow: Understanding the Dark Side of the Shadow*. San Fransisco: HarperSanFransosco.

to the insight that that a plant whose life ends at the flowering stage is essentially a flower, rather than a tree that is likely to bear fruit.

Alternatively, the more productive tree presented by the group that had grafted their branches seemed to suggest that mainstreaming can be approached through a bottom-up⁵ approach that is based on examining the whole tree to ensure, for instance, that a mango or citrus are grafted onto the same tree family. In organizational situations, this would require the development of change management capacities such as transformational leadership and other adaptive organizational practices that allow local level ownership and control. In the absence of this, the fear was expressed that HIV & AIDS mainstreaming might be perceived as simply another problem solving experiment—a bubble seeking funding that ends up expanding activity canopies, while destabilizing the identities and strategic processes of organizations.⁶

It was observed that HIV & AIDS mainstreaming will clearly take place in contexts that are already quite messy in terms of existing organizational development questions. It is therefore quite likely to be shed off where attempts are made to graft it simply as an administrative programme. Mainstreaming will thus need to incorporate deep transformative interventions for creating the necessary awareness and sense of urgency to take into account the reality of HIV & AIDS in the workplace, as well as changing mindsets and attitudes related to power, dependency, shame, sex, gender, love, competition and scapegoating.⁷



REVIEW OF DAY I

A recap of day I highlighted a number of key points gathered from the 1st day of the workshop, such as:

- I. Mainstreaming should be approached in the context of the development process of organizations. Exploration of institutional development questions through metaphoric work on day I, for instance demonstrated clear linkage

⁵ *Bottom up* approaches generally refer to building up new understanding and expanding the vision of possibility by exploring local experience and knowledge as building blocks in participatory learning or project situations. Bottom up techniques build bodies of knowledge or commitment to change from shifts in consciousness and responsibility-taking in the local situation. *Top down* approaches, on the other hand, use big and mostly external theory or instruments in an effort to build new possibilities in the local situation.

⁶ An Oxfam publication: *Mainstreaming HIV/AIDS in Development and Humanitarian Programmes*, offers an extremely well analyzed presentation of “The case for mainstreaming...” and “Arguments against mainstreaming HIV & AIDS” (pp. 25-42). The book is authored by Sue Holden for Action Aid, Oxfam and Save the Children. oxfam GB, 2004.

⁷ See “Working with the Client Consultant Relationship: Why Every Step is an ‘Intervention’”, by Naomi Raab, in *OD Practitioner*, VOL 38, no. 1, 2004, pp. 17-21.

between an organization's development questions and its ability to mainstreaming HIV & AIDS in a sustainable manner;

2. The discussion whether change takes place by evolution or revolution challenged us to revisit what concepts such as transformation imply so as to be more conscious of ideologies that are driving us as development practitioners today;
 3. Mainstreaming in itself can be destabilizing to organizations that presuppose a return to stability to be the outcome of any development intervention;
 4. From the metaphoric exploration of what helps or hinders the development of organizations, it appeared that most CSOs are currently working from their organizational shadow sides, i.e., driven by unconscious processes where the *unstated* dominate; such as the apparent mission statement of an organization whose canopy was reflecting ever increasing number of grafted activities: "to ensure that we shall bear not fruit."
 5. Mainstreaming must not be perceived to be as simple as a decision to graft a different tree variety on an existing stem. Quite often under such circumstances what remains unexamined is what an organization stands for, and how this might become a more powerful spur for deeply rooted and sustainable mainstreaming process.
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3. Deepening understanding of OD and HIV & AIDS in the workplace

3.1. WHAT IS OD?

Just as the growth of a tree is informed by specific information in the seed, the development of an organization must be informed by its vision, values and conviction, which also form the crucial infrastructure for change management. Working at these levels often meets with much resistance and therefore requires deep and consciously selected interventions.

The exploration of organizational images, and insights gained from it, was an extremely useful processes that provided a fair glimpse at what organization development (OD), as a discipline, might mean. The exercise was followed by a brief session that sought a more profound understanding of OD. A simple brainstorm surfaced participants' own understanding of OD, which offered a good start for deeper discussion.

After the brainstorm participants were given a one page write-up with the title: "what does an organization learn in an OD intervention?"—which they discussed in groups to highlight what was emerging for them about what an OD intervention is, or is like. The following was shared by the different work groups:

OD intervention

- **Encourages an organization to look into what it is fearing most, e.g., dysfunction in relationships, responsibility-taking, the not-to-be-discussed issues, the game playing, etc.**
- **Creates ownership**
- **Explores current relationship between claimed values and values in practice;**
- **Creates awareness about "distributed leadership" as capacity for managing change;**
- **Leads to acceptance of "our" responsibility in creating the current situation;**
- **Supports the formulation of organizational values, which need to be stated;**
- **Applies tools that create movement and shifts in perspective and behaviour;**
- **Is process oriented—works through participatory engagement of the client situation;**
- **Explores deep organizational levels of values, behaviour and purpose and elevates them to the levels of ongoing conscious management;**
- **Creates awareness of real or underlying development questions including how inequalities are created in an organizational setting;**
- **Builds systems and processes for democratizing the organization;**
- **Is supportive, non-judgemental relationship with the client that builds an organization's capacity to work effectively with its emotional intelligence.**

3.2. THE HIV & AIDS IN THE WORKPLACE DEBATE

The workshop committed one full hour, on the last day, to strengthen participants' understanding of the challenges of HIV & AIDS in the workplace. This was done through role-play. Two groups of parliamentarians presented opposing views to the motion: "There is no serious HIV/AIDS threat posed to our organization as of now, hence no need to act."

Their different arguments, in summary, were as follows:

PROPOSITION	OPPOSITION
We are an all educated. We know the issues. No need to waste money in mainstreaming activities.	All current research shows evidence of serious threat to organizations and society.
It is an individual matter and we are a highly religious group .It is also a culturally sensitive issue.	Remember the other Rev. With a Ph. D. Who died recently of AIDS, although it was a quiet thing?
This is a purely health issue and there are other organizations doing that! We are not in the health business. It will be a pure waste of money and effort.	It is a threat to the lives of employees and our productivity. It is a social matter at organizational and community levels. I come from a village where infections have reached staggering proportions. Kids are seriously ill or not going to school because they are orphans.
Lets us concentrate on poverty reduction issues. This is a waste of money. Furthermore, making it an internal issue is spoiling the good image of parliament. (foot thumping)	High staff turnover, absenteeism and low productivity are even more seriously affecting the image of this august house. It is also appearing to the public as if we don't care.
It is not proper, in our culture, to talk about someone's private life. Just concentrate on helping communities understand how infection happens so they can stop spreading the disease. (noise, sounds of approval)	Representing people means coming together to fight against something that is hindering development. HIV & AIDS are hindering development right here inside parliament! (foot thumping)
We need to solve disasters and not HIV, which has been there for many years.	(Booing)Increasing absenteeism is clearly not in line with procedure. Our organizational process is suffering.
The opposition are simply singing on the side of donors. This is a donor song. (foot thumping)	But we also know that absenteeism is increasing in parliament because people are extremely busy politicking at the growing number of funerals. Have these sad occasions become the new market for vote catching? (foot thumping)
There are many members of parliament dying in road accidents compared to AIDS	(Noisy disagreements, member of opposition is thrown out by Sergeant at arms)
If HIV/AIDS is introduced in the parliament we must also introduce malaria desk because it is the main killer. (Noises of approval)	There is a lot of lying about statistics of people who die of AIDS because of the taboos and sensitivities surrounding it. (Foot thumping)
Individuals in parliament have the knowledge. It is up to them to act.	(Noisy disagreement. Confusion)
Parliament adjourned	

INSIGHT: AN INTERVENTION IS MUCH MORE THAN PRODUCT

What was learnt from the HIV & AIDS in the workplace debate

1. One gets a sense of complexity involved in HIV & AIDS in the context of organizations and their development, which comes from varying perceptions and mindsets.
2. It was powerful to be what we were being asked to do. “What would I do as a facilitator, to help them see their organizational question related to the reality of HIV & AIDS in the workplace?”
3. The exercise mirrored societal attitudes that surround the issue of HIV & AIDS—attitudes that are extended in organizational situations;
4. It was a simple exercise manifesting the messy reality that we face in organizations. People in denial know that “it is a problem that does not exist.”
5. As parliament we kept externalizing the issue. This makes me think in terms of “intervention”. It shows how difficult it can be to successfully mainstream HIV & AIDS—people have existing perceptions, approaches and activities that they believe are more important;
6. It was a difficult discussion. It clearly suggests that mainstreaming should, as an essential approach, seek to address things that go into areas of possible resistance, i.e., **the intervention** (for change) requires much more work in the organizational situation if we are to realize sustainability of the **product** we are ultimately seeking to fix.
7. It clearly raises the question: “what might be the role of OD in this?”

4. How can we practically facilitate these processes?

4.1. CLARIFYING THE JARGON

Harmonized version of what participants came up with from group work, where they had discussed their own understanding of seven terms that were being used repeatedly since day 1 of the workshop.

HIV & AIDS MAINSTREAMING						
AIDS WORK	HIV & AIDS MAINSTREAMING	INTERNAL MAINSTREAMING	EXTERNAL MAINSTREAMING	COMPLIMENTARY PARTNERSHIPS	INTEGRATED AIDS WORK	ORG. CORE BUSINESS
Health oriented interventions aimed at preventing HIV & AIDS or addressing its consequences for those infected.	An organization changing its lenses and making alterations in its activities, systems and processes as appropriate, to make it more relevant and better able to function In the context of HIV & AIDS.	Changing organization's policy & practice in order to reduce organisation's susceptibility to HIV infection and vulnerability to the impact of AIDS	Adapting different perspectives and programme outreach work to take into account susceptibility to HIV transmission and vulnerability to the impact of AIDS.	Linking up services of different organizations, e. g, community micro finance with AIDS support organization, VCT, or condom distribution volunteers.	Responses to HIV/AIDS that incorporate various approaches and components of psychological, development and humanitarian project work	Activities, processes and relationships reflecting an organizations identity and designed to achieve the stated purpose of an organization.
OD/ID						
<p>1. OD refers to interventions, in individual organizations, focused on strengthening conscious management of visible, underlying and emerging issues.</p> <p>2. ID is the process of strengthening an organization's conscious management of its values and activities in the context of identity, relationships and performance of a whole social sector, or between sectors, e.g., govt. NGOs, Faith Based Organizations, private sector, etc.</p>						

4.2. SEEKING MUTUALITY

The definition of terms captured in the table above brought about much better clarity for the two sets of participants in the workshop, i.e., those involved in consultancy work either as mainstreaming experts or as OD practitioners. It simplified the conversation and strengthened the perception of mutuality in the interest of enabling organizations to continue to work effectively toward realizing their stated purposes, in the times of HIV & AIDS.

The discussion below maps out important questions that stimulated thoughts on action-steps for bringing mainstreaming and OD practices toward greater complementarity in supporting work place resilience in the times of HIV & AIDS. This is a broad assessment which helped participants to begin to respond to the question: “How can we practically facilitate such processes?”

An important set of questions that were suggested for OD in this conversation include:

- “What, as practitioners, are we taking into the new environment created by the reality of HIV & AIDS in organizational settings?
- To what extent is OD conscious of the existence and effects of HIV & AIDS in the workplace?
- In what ways does OD, as a practice, engage with this reality?

A specific question that seemed to be emerging at the interface between OD and mainstreaming is around the term (mainstreaming) itself. Some people shared the feeling that “mainstreaming” may sound intrusive or invasive, and therefore distasteful to the practice of OD, particularly at the entry point in a client situation. An OD consultant is particularly keen to work through an effective client-consultant *relationship* as an intervention that minimizes the likelihood of colluding with the client’s resistance dynamics. This is clearly discernible in some of the definitions of OD/ID offered above, such as: “Bringing the unconscious processes of organizations to consciousness.”

Some thoughts shared around mainstreaming included the fact that in most cases it tends to be approached as a 'quick fix' solution, i.e., modifying policies and programmes without clearly supporting the adaptive capacities of an organisation through greater appreciation and ownership. As a result, organizational responses are often unsustainable or are appreciated only by a few and, indeed, often regarded as 'foreign' and imposed.

The ability or inability of an organization to sufficiently take account of and respond effectively to HIV & AIDS could be related to a number of things including 1) denial/ repression/resistance; 2) organizational members’ loyalty to legacy practices, fired by the fear that attention to emerging issues might jolt them out of well established comfort zones. *Such unconscious processes would normally work to entrench organizational inadaptability, which have strong implications on prevailing leadership practices and the organization’s ability to transform existing practices that hinder sustainable development.*

It was noted that an **intervention**, from an OD perspective, is not equivalent to the change itself, e.g., “new policy in place”, as a product. Instead, a successful intervention frees people up to explore the less rational aspects of organizational life in a way that acknowledges the hard to talk about tensions, for example around power, dependency, shame, authority, sex, etc.

Quite obviously, new policies need to be established and systems modified and implemented in the best possible manner. This goes to support the immediate day-to-day resilience needs of organizations in the times of HIV & AIDS. At the same time, mainstreaming work will need the support of powerful interventions that help organizations confront their real or underlying questions related to their adaptability and other capacities to respond to emerging issues.

Participatory review of day two

POINTS THAT STOOD OUT FOR PARTICIPANTS ON THE 2ND DAY OF THE WORKSHOP

Questions related to mainstreaming, characterized by the metaphor of grafting

1. While grafting can lead to the bearing of better fruit, organizational life and work dominated by the practice of grafting often means that project work and systems strengthening activities overwhelm the purposefulness and strategic management of an organization;
2. Grafting, if it indeed characterizes mainstreaming, should be more about “increasing awareness of what is emerging in the environment in order to improve authentic responsiveness based on an organization’s values and core purpose—or specific areas of professional skills;
3. Capacity development activities that become an avenue for CSOs to drift into “just doing business” undermine their institutional development potential;
4. Organizations must be able to sustain their capacity to generate fruits that have a chance to fall for the benefit of communities – rather than ending up at the stage of flowering and building beautiful canopies only.

OD and mainstreaming

One question particularly influenced the discussion of how OD and mainstreaming can work in tandem to sustain organizational commitment to policies, processes and practices that take account of HIV & AIDS in the workplace: 1) How shall we use the knowledge of OD to respond to organizational questions in a way that is not about “just doing business”?

1. In the case of mainstreaming HIV & AIDS, an organization needs to go through a process of seeing and asking the question: “what is this picture or situation saying to us?”
2. Mainstreaming through an OD intervention is to challenge an organization to align its practices with what they believe in. This is the core practice of OD;
3. The role of an OD practitioner is to build dynamic institutions that can adapt to changing circumstances and develop new systems and activity profiles in ways that reflect their values and purpose;
4. To have a positive impact toward transforming organizational cultures for mainstreaming will require practitioners to work with both sides of the mainstreaming question: “mainstreaming HIV & AIDS into OD practice” or “Mainstreaming OD into HIV & AIDS workplace development practices”;
5. A less intrusive way of thinking the relationship between OD and mainstreaming is to refer to *mainstreaming* as **consciously structuring organizations and practices in ways that take account of HIV & AIDS**. It may indeed be that the term mainstreaming itself is rather invasive in its tone.

4.3. WHAT IS HIV & AIDS IN ORGANIZATIONS ASKING OF OD?

A number of specific definitions captured in the table above clearly imply the kind of processes that are likely to be applied in either OD or strictly mainstreaming activities. This section offers detailed examples of likely improved responses in facilitating organizations to strengthen resilience in the times of HIV & AIDS and sustain their capacities to work productively and move toward their essential purposes.

In the exercise of the previous day, when specific terms related to HIV mainstreaming and OD were clarified, three questions emerged for OD as a practice: 1) to what extent is OD conscious of HIV & AIDS as a new reality that adds significantly to the complexity of managing organizational life? 2) what are OD practitioners taking into the new organizational situation that is affected by HIV & AIDS? 3) how is OD going to address organizational questions related to HIV & AIDS, or help them sustain their performance toward their stated purposes in the context of HIV & AIDS in the workplace?"

The discussion of the three broad questions was carried out in small groups. The questions were broken down in the interests of greater specificity as follows:

1. What are OD practitioners likely to encounter as organizations' presenting questions related to HIV & AIDS mainstreaming?
2. How can OD intervene to address such questions?
3. What questions do the above raise for you now?

4.3.1. Responses from group discussions

4.3.1.1. Broad-spectrum

LIKELY QUESTIONS ON HIV & AIDS MAINSTREAMING	POSSIBLE DEVELOPMENT SUPPORT THROUGH OD	EMERGING PRACTICE QUESTIONS
<ol style="list-style-type: none"> 1. Where shall we get resources, including time, funds and skills? 2. What is the relationship between HIV/AIDS and the core business of our organizations? 3. What is the relationship between the organization and other players in HIV work? 4. What is the impact of HIV & AIDS on the organization (background and evidence); 5. There is a contradiction between the internal and external response (denial); 6. We experience inadequacies in dealing with HIV & AIDS as an organization; 7. How do we address attitudes and other social dimensions of HIV & AIDS (stigma, discrimination?) 8. Lack of shared values/ownership of the response to HIV & AIDS; 9. How do we deal with challenges posed by members who are either infected or affected by HIV & AIDS? 10. Absenteeism and other issues that lower productivity; 11. How shall we manage increased organizational costs related to supporting those infected and affected? 12. How can we remain dignified when we acknowledge and mainstream HIV & AIDS in our systems and activities? 13. Lack of space and structure to counsel. 	<ol style="list-style-type: none"> 1. Use a diagnostic tools to generate the organization's will to see, take responsibility and commit to appropriate action; 2. Apply processes and tools to surface underlying issues; 3. Construct new systems and learning processes that support culture change; 4. Coach leaders to surface and manage shifts around underlying feelings and motivations likely to hinder their ability to see/support HIV & AIDS mainstreaming; 5. Facilitate organization-wide awareness and commitment to sustainable responsiveness; 6. Facilitate self-assessment of levels of commitment to mainstreaming based on organizational values (seek alignment of values and relevant organizational questions) 7. No 6. Above entails address both the inner and outer paths of the organization. 	<ol style="list-style-type: none"> 1. How can what I already know be a hindrance in facilitating the situation? 2. What values and attitudes should I carry with me in the situation? 3. How much of HIV & AIDS do I need to know as an OD facilitator (technical skills/other competencies?) 4. How deep do I take the diagnostic process—to generate the will and movement in the organization? 5. How does an OD practitioner respond when an organization's question is purely about mainstreaming into systems and programmes (outer path)? 6. How do I manage the expert posture, particularly if the client seems "blind" in the face of escalating problem threatening their very existence

It was noted that an **OD response** is usually conducted through specific steps:

1. An OD practitioner is invited in an organization and presented with a specific question;
2. Practitioner helps the organization explore and identify perceived and underlying issues through a process which surfaces its unconscious dynamics likely to help or hinder the realization of its potential;
3. Increased awareness and acceptance or responsibility-taking generates commitment and energy, leading the organization to plan action steps to resolve stuck points or pursue clearer opportunities.
4. In relation to HIV & AIDS, "next steps" may involve immediate mainstreaming into activities and systems, or other development interventions that address culture, process or specific practice transformations.

4.3.1.2. Examples of possible OD responses to specific questions

ORGANIZATIONAL QUESTION	POSSIBLE DEVELOPMENT RESPONSE THROUGH OD
How do we fit this thing with other things in our organization?	<ol style="list-style-type: none"> 1. Support the organization to clarify source of the HIV & AIDS related question in its current situation; 2. Facilitate an exploration of what this question means for the organization at this point.
We would like to know more about how HIV & AIDS are affecting our organization and how we can respond	<ol style="list-style-type: none"> 1. Help the organization expand their vision of possibility with regard to mainstreaming HIV & AIDS. Explore related positive core experiences with questions such as: <ul style="list-style-type: none"> - What did you do well in responding to previous emerging issues for your organization? - What did you learn or particularly value in that experience? - What the new awareness ask of you, in terms of “unlearning” or “letting go”? 2. Support the organization to develop a vision of what they would like to do more of, as a general practice and in this particular situation related to HIV & AIDS.
How can we get people in our organization to start talking about HIV & AIDS beyond programme activities?	<p>Create safe space through use of metaphor to discuss HIV & AIDS;</p> <p>Use “three levels of listening” exercise to help the organization explore:</p> <ul style="list-style-type: none"> - What we know about HIV & AIDS; - How we feel about it; - What we would like to do about it at various levels of our organization.
How do we assess our response’s impact of on our ability to sustain our work?	<p>Refer the organization to an M & E or mainstreaming expert OR</p> <p>Take them through an “action learning” process on their specific experiences.</p>
We have heard about this HIV/AIDS mainstreaming business. What is it and what can we do about it?	<ol style="list-style-type: none"> 1. Support the organization to clarify source and nature of this question in its current situation; <p>If relevant refer them to an HIV & AIDS specialized organization or mainstreaming expert.</p>

5. Concluding remarks and way forward

The workshop highlighted OD relevance in all situations of change, particularly of a transformational nature where an OD practitioner supports processes for people to come to their “aha”, i.e., a discovery that they need some new leverage if they are to take their development further.

OD was considered to be particularly relevant in terms of *generating* and sustaining organizational “will” to see those things that they are likely to deny in their organizational life, coupled with additional transformational interventions toward culture change and ability to implement new systems and procedures.

5.1. EXPRESSED SHIFTS IN AWARENESS AND NEW QUESTIONS

5.1.1. The process of HIV & AIDS mainstreaming may be supported by OD interventions through:

1. Learning processes in which organizations and individuals in them discover their strengths from their experiences;
2. Participatory engagement—organization wide interventions that create shared ownership and sustainability of purpose;
3. Follow-up activities that support continuity in change processes;
4. Training to enable sharing of experiences, knowledge exchange and acquisition of new skills in the use of change management tools;
5. Surfacing claimed values as the basis for interventions that challenge organizations to take into account the interests of disadvantaged people.

5.1.2. The transformation question: OD and HIV & AIDS mainstreaming as practices

Richard: I have become much clearer of the role that OD can play in mainstreaming. My remaining question however, relates to my essential responsibility to manage unconscious processes in an organization, in relation to my own unconscious material that might influence the situation in ways that do not effectively support change and transformation. To what extent should I, as a practitioner, proactively introduce my views regarding whatever the organization may need to do differently? It is a critical practice question for me to manage these boundaries properly. Given that both performance and change depend upon motivation, they are fundamentally emotional issues, i.e., transformational rather than merely transactional.

Jared: The notion of OD’s response to HIV & AIDS in the workplace is challenging because the primary responsibility of raising an organization’s questions is not mine, as an OD practitioner. Organizational questions emerge out of exploration through the use of specific tools and consciously managed relationship between the facilitator and the client situation. I am still curious to know what are the specific principles that guide mainstreaming itself, as a practice.

Doreen: The workshop has given me confidence to stop using the word mainstreaming. I have struggled in the past, every time an organization said “we want to mainstream.” I am now more inclined to continue working with the simpler and more respectful expression of: “How are you going to take HIV & AIDS into account....?”

5.2. WAY FORWARD

5.2.1. Platforms for dialogue, skills development and institutional development support

The final conversation of the workshop focused on determining how OD processes that transform culture and practices can be incorporated in HIV & AIDS mainstreaming work.

Given the concerns raised above specifically with regard to the “risk” of OD becoming a mainstreaming discipline, two areas of actions were suggested that seem to offer a health interface without infringing on the sensitive practice specificities of OD:

1. Include HIV & AIDS as an example among the descriptions of factors shaping organizational behaviour at various levels in the “organizational complexity model” used by OD in organizational surveys
2. Train HIV & AIDS mainstreamers with essential OD knowledge and necessary tools for deep change interventions.

Including HIV & AIDS in the diagnostic tools of OD means that every organizational survey will raise awareness upfront about HIV & AIDS as a critical question for the development and resilience of organizations, without necessarily appearing to be an activist issue of the OD facilitator.

It was noted that organizations such as EASUN might extend institutional support for both training and direct OD interventions upon request, given increased awareness from conversations such as the workshop in Moshi. This was seen to be the kind of dialogue platform that activists and organizations specifically focusing on HIV & AIDS may continually seek with OD. In the long run, such engagements will also improve OD’s ability to work with emerging issues for the institutional development of organizations in the East African region.

5.2.2. Next steps for EASUN

1. Review the organizational complexity framework to assess specific levels where HIV & AIDS may be added in the descriptions of organizational behaviour or likely responses;
2. Select OD tools and process techniques for fast tracked training of HIV & AIDS mainstreaming practitioners
3. Organize pilot training in the use of selected tools and related process techniques for transforming organizational culture and governance practices.

6. EVALUATION: HOW PARTICIPANTS EXPERIENCED THE WORKSHOP

WHAT WENT PARTICULARLY WELL	WHAT NEEDS IMPROVEMENT	KEY INSIGHTS GAINED
<p>1. The use of metaphors in group work and plenary discussions induced participants' creativity and motivated people to bring HIV & AIDS to life in the stories that specific organizational images had generated;</p> <p>2. Sharing of case-studies and experiences enabled participants to discern how OD can be used to support HIV/AIDS mainstreaming. Such sharing was extended to the level of facilitating the workshop. Varied skills of participants and the main facilitator were used in an open and complimentary manner, which clearly brought out key issues in OD and HIV & AIDS mainstreaming;</p> <p>3. The workshop process was participatory in a way that enabled participants to practice transformational leadership capacities such as inclusivity, participative engagement and active listening. This heightened shared purpose throughout the workshop;</p> <p>4. My question on the value that OD adds to HIV & AIDS work was clarified;</p> <p>5. The workshop learning process generated action steps toward establishing good working linkage between OD's powerful interventions for organizational culture change and policy mainstreaming work toward organizational resilience;</p> <p>6. High energy levels and humour of participants supported dynamic thinking, good feelings and productive encounters throughout the workshop.</p>	<p>1. The facilitator attempted to lecture on scattered issues on the first day. This was coupled with frequent interruptions by participants attempting to put things in perspective for the workshop;</p> <p>2. The facilitator took time to understand OD concepts and methodology;</p> <p>3. It was not clear how HIV/AIDS was to fit into the conversation on the first day, which was really basically OD;</p> <p>4. Improve punctuality of participants getting back to the hall after breaks;</p> <p>4. The days were few for new concepts to be discussed and internalized;</p> <p>5. Participants should be informed about reflection at the end of each day's work and their role in improving the workshop process;</p> <p>6. The process flow of the workshop should be adequately clarified. The facilitator at times appeared to be overwhelmed by the participants.</p>	<p>1. Clear understanding of issues and trends in the institutional environment makes a more effective facilitator of both OD processes and mainstreaming of emerging issues such as HIV & AIDS;</p> <p>2. The essential function of an OD intervention is to help organizations surface unconscious issues and processes in their lives and activities;</p> <p>3. As a facilitator always there is need to work consciously with practicing values</p> <p>4. Development practitioners have a great role to play in society, particularly when their interventions, as in OD, have their starting point in the claimed values of organizations or communities;</p> <p>5. OD practitioners have an opportunity to meaningfully facilitate change in support of HIV/AIDS mainstreaming;</p> <p>6. An OD intervention can challenge an organization to see that HIV & AIDS mainstreaming is to do with them living up to their values. vision and mission;</p> <p>7. I learnt how important it is to take care of not only the product, but the process as well;</p> <p>8. A good outcome of the process depends on both the facilitator and the participants;</p> <p>9. Participatory approaches to learning work well in facilitating change;</p> <p>10. HIV & AIDS Mainstreamers need some OD knowledge and skills;</p> <p>11. Discovered need for OD practitioners to be conscious of HIV & AIDS challenges in workplaces</p>

Looking ahead

From the experiences and insights shared in the evaluation above, participants recommended specific actions that are likely to improve similar conversations or learning and planning activities in the future:

What to strengthen in workshop situations

- Better preparation of the facilitator by the organizers in order to strengthen mutual learning and effective contribution to the workshop process, by both the facilitator and participants who may carry different practices and approaches. As an example, the facilitator needs to be briefed on the background, experiences and training of participants
- Improve documentation of background materials and encouragement of participants to actually read the key definitional ones;
- Taking of notes needs to be understood as an involving activity that is demanding of professionalism. Participants may need something to refer to before the start of the following day's activities;
- To have more people who are HIV/AIDS mainstreamers so that they can be a good balance in the conversation.

“Hear this, and take it forward”

Closing statement by workshop participants

The workshop raised as many questions as it answered. It went deep into unearthing the practice of OD and in a very helpful way established a link of how it is related to HIV/AIDS mainstreaming. The whole process was designed and managed through approaches that enabled participants to raise challenging issues. No question was too tough to bring up for discussion. From the dynamic engagement, sharing and learning we particularly noted the following:

1. Well targeted OD interventions will raise the consciousness of organisations about HIV & AIDS, in ways that are likely to inspire responses at the deep levels of behaviour and culture change. This will clearly improve the possibilities of having HIV & AIDS mainstreamed with the necessary awareness and responsibility-taking, leading to commitment and energy to act on the issue.
2. We gained useful insights on how one can apply OD to support mainstreaming activities. HIV & AIDS are complex issues. It is easier for individuals, organizations and communities to externalizing them rather than take responsibility for both their presence and impact. The complexity of managing HIV & AIDS in the workplace is compounded by the fact that effective and sustainable responses depend on the equally complex challenges of change management and institutional development in organizational contexts.
3. Mainstreaming will need to incorporate powerful interventions for creating and sustaining the necessary sense of urgency in order to keep people focused on adapting new policies and practices.

4. OD can play a unique role in laying the ground for transformational change during or after mainstreaming processes.
5. The workshop was yet another chance for us to get challenged and confront ourselves as development practitioners. We hope that what we came up with from this workshop will be taken forward by the different actors involved in supporting action for addressing HIV & AIDS and related organizational resilience questions.
6. EASUN should continue to create spaces so that many leaders and their organisations in East Africa may continue to learn and transform their practices through effective engagement and meaning-making. We the participants in this workshop clearly took responsibility for our own learning.

7. LIST OF WORKSHOP PARTICIPANTS

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Groundbreaking initiative incorporates HIV & AIDS in OD survey tool

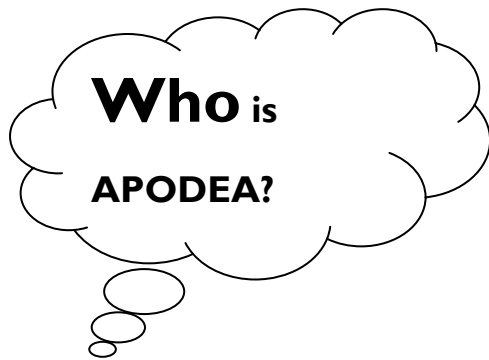
Following EASUN’s workshop on OD and HIV & AIDS mainstreaming workshop of 12-14 April, the Carrying Group of APODEA (Association for Practising OD in East Africa) noted the potential value of OD to HIV & AIDS mainstreaming.

In its meeting of 15th April 2010 the group undertook a quick review of the organizational complexity framework and identified the level of environment to be the right place to include HIV & AIDS as an example of forces affecting both organizational capability and purpose. The choice of the environment level was informed by a realization that HIV & AIDS was an issue manifesting itself at all organizational management levels, such as systems and activities, relationships, leadership, values, etc.. It was therefore considered more appropriate to include HIV & AIDS in the description of the level of environment, which is the source of forces and needs that influence an organization’s external and internal strategies.

APODEA’s proposed adjustment of the description of the “environment level” in the organizational complexity model reads as follows:

8. ENVIRONMENT	<p>- Changing needs and trends in the social, economic, cultural and political situations in which the organization operates, including emerging issues like climate change, HIV & AIDS, and their potential effects on the ability of organizations to sustain their purposefulness and effectiveness.</p> <p>– how the organization consciously engages with or responds to those factors (internally and externally).</p>
7. IDENTITY
6. VALUES

APODEA intends to hold discussions with practicing and training institutions such as EASUN for broader consensus on the proposed inclusion of the example of HIV & AIDS in this essential practice tool.



APODEA characterizes itself as:

A movement to influence social development practices through OD, by promoting transformational values in leadership and other development interventions.”

Its specific objectives include

- Advancing knowledge and skills of OD practitioners;
- Creating space for learning and sharing;
- Advocacy for transformational/adaptive practices;
- Developing standards for assessing practice;
- Building strategic alliances;
- Research and publication to scrutinize values/ ideologies promoted by dominant practices in development.

APODEA was formally founded in Moshi, Tanzania, in 2009