

# PracticingOD

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**Welcome to *Practicing OD***, a collection of short articles (900–1200 words) on useful ideas, lessons learned, and practical suggestions for managing the day to day challenges of doing OD. We welcome brief case studies; guidelines and tips for applying proven or cutting-edge methods, principles, processes, practices, interventions, and tools; and thought-provoking essays on practice-related challenges, questions that emerged from a client engagement, or new trends and technologies that will influence the practice of OD.

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Include your name, phone number, and email address. If your article is accepted for publication, you will be notified via email. We look forward to hearing from you.

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## Submission Guidelines

- » Articles should be practical and short (900–1200 words; 3–4 pages single-spaced)
  - Write in your own (first-person) voice using simple, direct, conversational language.
  - Focus on **what** you are discussing, **how** it works, or can be used, and **why** it works (what you believe or how theory supports it).
  - Use bulleted lists and short sections with subheads to make it easier to read.
  - Include everything in the text. No sidebars. No or very limited graphics.
  - Do not use footnotes or citations if at all possible. Citations, if essential, should be included in the text with a short list of references at the end of the article.
- » Articles can be written from various perspectives, including but not limited to:
  - Brief case studies that highlight useful concepts, applied theories, lessons learned, and implications for future practice.
  - Guidelines and tips for applying proven or cutting-edge methods, principles, processes, practices, interventions, and tools.
  - Thought-provoking essays on practice-related challenges, questions that emerged from a client engagement, or new trends and technologies that will influence the practice of OD.
- » Include a short (25–50 word) author bio with your email so readers can contact you.

“Whether you call it a contagious movement, change management, process improvement, or cultural shift, the effort to improve is a journey on which an organization embarks.”

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## Pack Your Bags for an Improvement Journey

By Annette Schultz

*That is the paradox of the epidemic: that in order to create one contagious movement, you often have to create many small movements first.*

—Malcolm Gladwell  
from *The Tipping Point*

Whether you call it a contagious movement, change management, process improvement, or cultural shift, the effort to improve is a journey on which an organization embarks. When that organization is healthcare, you better pack your bags for an extended trip! Sanford Health is no exception and the past five years have been a whirlwind trip in change and improvement.

Sanford Health, like the rest of the healthcare industry, is a challenging place to introduce change and improvement. Healthcare has strong roots in clearly defined hierarchies (think doctor/nurse, clinic manager/staff) so much that certain roles are identified by special jackets and uniforms. Healthcare is highly regulated with boundaries always looming over innovation attempts. It is comprised of complex systems from care delivery, facility management, supply chain, and human resources to food service.

Sanford Health also has the added challenge of fast growth. In 2010, the Sanford Health organization was formed from the merger of two large health systems in Fargo, North Dakota and Sioux Falls, South Dakota. The growth quickly added systems in Bismarck, North Dakota and Bemidji, Minnesota. It now includes hundreds of primary and specialty clinics with rural and metro locations, critical access hospitals, home care services, durable medical equipment, and long-term care sites across nine states and four countries.

In 2013, Sanford Health brought together internal professionals who were successfully practicing various improvement processes such as Lean, Six Sigma, and Plan-Do-Study-Act (PDSA) tests of change. This team of OD, quality and medical professionals were tasked with outlining an improvement model for the organization. They developed the Sanford Improvement Model, a standard method for change management. The standard states “Sanford Improvement is a unique methodology that unifies how we identify, approach, and manage improvement efforts across the enterprise.” The model reflects the values and the culture of the

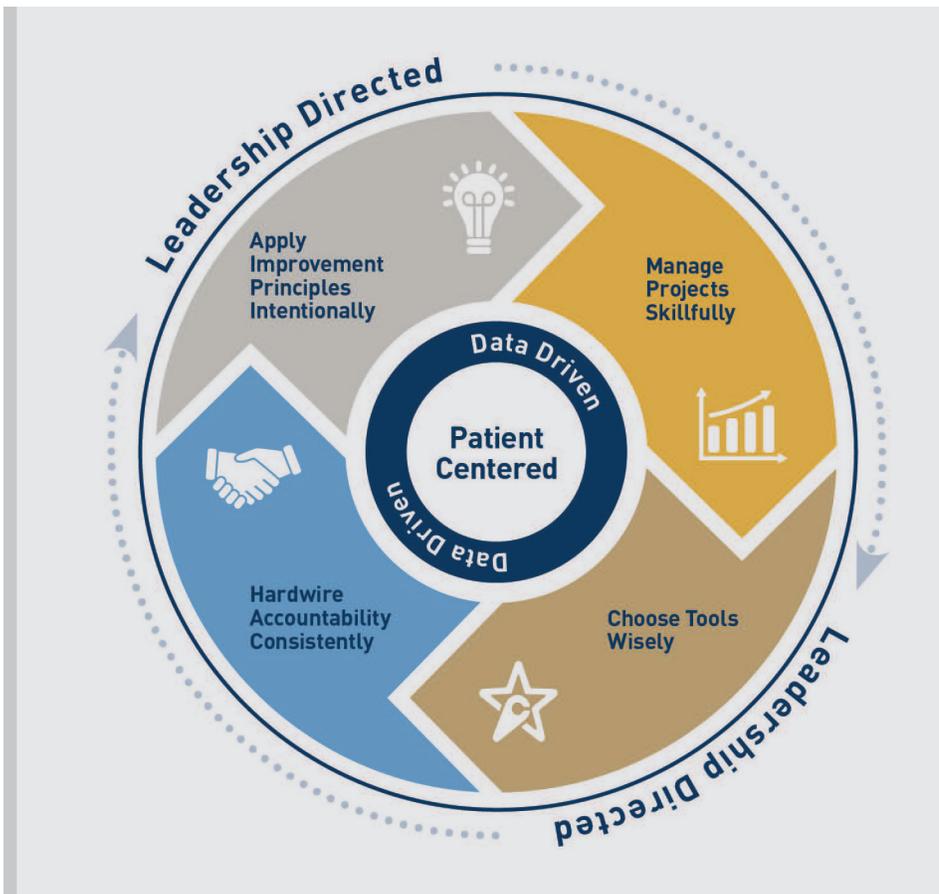


Figure 1. Sanford Improvement Model

organization with three concentric circles of Patient Centered, Data Driven, and Leadership Directed. These values give structure to the model and shape the expectations of how improvement should be conducted.

The model (Figure 1) also incorporates four evidence-based action items founded in improvement science. The first action item is Apply Improvement Principles Intentionally. The model allows practitioners to implement Lean tools, run small tests of change through PDSA, or utilize the DMAIC (Define, Measure, Analyze, Improve, Control) problem solving steps. The message is *these methods all work if you use them as intended*. Second, change within a complex system like healthcare is most successfully achieved through project teams. The model's second action item calls on teams to Manage Projects Skillfully, balancing the dynamics of teams and the successful completion of tasks. The model's third action step acknowledges an abundance of internal tools and resources, and encourages users to Choose Tools

Wisely. Finally, the fourth action item, Hardwire Accountability Consistently, was incorporated in the model as a necessity for sustaining improvement gains and building shared commitment to standardization.

The Sanford Improvement Model provided a framework to take the organization on a 5-year journey to increase the capability to improve.

#### Year 1

- Offered 1-hour information sessions on each element.
- Developed Sanford Improvement Toolkit, an online resource for standardized tools and templates.
- Created a computer-based training module, *Introduction to Sanford Improvement*.

#### Year 2

- Created a competency survey on Sanford Improvement knowledge, skills, and behaviors.

- Developed targeted education for each major market on areas of gaps in competency results.

#### Year 3

- Developed an 8-month training course for leaders, Leading for Improvement (L4I).
- Offered L4I to an initial cohort of 20 participants from clinic operational leadership.
- L4I participants worked with a trained quality coach for one-on-one mentorship through the improvement process.
- L4I graduates completed 22 hours of classroom training, plus coaching, culminating in a project poster presentation from each cohort member.

#### Year 4

- Developed an enterprise-wide nomination process with Human Resources for L4I.
- Expanded L4I to include two cohorts of 20 participants each year.
- Adapted L4I curriculum and shared with medical residents at Sanford teaching hospitals.

#### Year 5

- Instituted "Sanford Improvement Academy" for all education on the Sanford Improvement Model.
- Expanded L4I to include two cohorts of 30 participants each year.
- Developed ten 30-minute webinars and four regional Boot Camps for local leaders.

The Sanford Improvement Model also provided a framework to increase the capacity to improve. There is now a shared language understood across the enterprise along with shared expectations and common actions. This new capacity has led to behavior change. Executives and physicians are leading by example, organizing project teams, walking groups through current-state analysis, running small tests of change, documenting interventions, and sustaining gains

over time. Graduates of the Leading for Improvement (L4I) program are now serving as coaches and mentoring their peers on the improvement process. Data transparency is an expected norm and there is a safety culture for sharing results, pointing out concerns, and working toward better outcomes.

At the enterprise level, improvement efforts are recognized by senior leadership through an annual improvement award. The winning improvement ideas are then implemented across the enterprise. Leading for Improvement (L4I) participants have produced the winning ideas the past two years.

Recognition of improvement is also held at the regional level. Each market hosts a “Sanford Improvement Symposium” where posters of improvement successes are shared, and senior leadership speak about change management. The posters highlight gains made in patient care, staff experience, and system workflows. This year, there have

been over 300 posters, several of which were selected by external professional organizations to be presented at their national events.

At the departmental level, there have been numerous gains due to improvement efforts. Within 100 days, teams have seen improved metrics such as a 6% decrease in abandoned call rate in family medicine clinics, 33% decrease in dialysis patients with a Tunnel Catheter for more than 90 days, 80% increase in A1C goal documentation with medical residents, and 69% increase in bedside reporting at a Critical Access Hospital. The organization’s current challenge is to determine how to document and categorize these improved results.

The improvement journey for Sanford Health is not over. This amazing cultural shift to embrace change and improve processes will continue to grow. And plans are underway to spread Sanford Improvement Academy to other organizations, so they can experience the

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engagement and success for themselves. Pack a bag and dare to send your organization on a change management trip!

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“My client, a newly hired president of an international firm, wanted to adopt a new strategy he had crafted by himself. His team of six vice-presidents actively resisted the plan. The client said that the vice-presidents were ‘just stuck in the past.’”

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## Bridging Executive Team Conflict

By Mary Lippitt

One of my clients was entering a strategic planning process with a dysfunctional executive team. The team was stuck over how to plan for the future. The lack of harmony was attributed to perceived personal slights, pressure tactics, and lack of information. In this case, resistance and competition replaced collaboration and the chance for agreement was never established.

### Background on the Team

My client, a newly hired president of an international firm, wanted to adopt a new strategy he had crafted by himself. His team of six vice-presidents actively resisted the plan. The client said that the vice-presidents were “just stuck in the past.” He believed they sought to limit his success and tenure since several had applied for his position. He wanted me to interview each team member to start a bridge-building process with a one-day offsite meeting.

### The Beginning of the Bridge to Conflict

During interviews, the vice-presidents voiced objections to the president’s “go it alone” style and his lack of industry knowledge since he was new to the industry. The prevailing opinions were that he was grandstanding for the board

and was not interested in working collaboratively. The fact that the president did not consult staff in developing the strategic plan was used as an example of his Lone Ranger approach. It was clear that the team was at an impasse.

From the interviews, I also discovered, while there were entrenched positions, everyone wanted the organization to succeed. Therefore, I chose to focus on identifying shared organizational outcomes to shift the team’s focus away from personal suppositions to objective analysis. My goal was to engage them in a results-oriented search to discover a mutually acceptable plan for the future. Since the strategic plan was the official cause of the breakdown, it made sense to focus on strategy.

### Discovery of Mindsets

In my experience, many strategic discussions revolve around vague aspirational statements which offer encouragement but little direction, definition, or measures. This executive team needed to agree on something specific and measurable. My assumption was that strategic alignment would rupture the personal stereotypes, trigger discussion, and allow the team to critically assess alternatives. Therefore, in preparation for the off-site meeting, I asked all attendees to complete the

*Leadership Spectrum Profile*® and review the generated report.

The Profile examines six organizational goals and how they currently drive an individual's goals and priorities. It also creates a common vocabulary for discussing advantages, constraints, and trade-offs among those goals. In addition, it focuses on existing circumstances and goals rather than past actions, offering an opportunity to explore facts and alternatives. The six situational mindset goals concentrate on:

1. innovation or being seen as state-of-the-art,
2. customer and growth focus,
3. seamless infrastructure and policies,
4. productivity, quality, and ROI,
5. change-ready engaged culture with strong bench strength, and
6. new trends, business models, and niches.

The team was asked to complete the inventory based on their assessment of the best strategic orientation. After completing the inventory, each member received a report on their goal orientation.

A composite team profile without names was presented at the off-site and the composite revealed a split with six individuals in agreement and one with a different perspective. Offering the results without attribution enabled participants to identify their positions and kicked off a productive discussion of the strategic priorities. The six vice-presidents shared a common focal point on improving quality and internal processes. This point of view or situational mindset prefers evolutionary change, risk mitigation, and has an internal focus at this time. The president's mindset targeted expanding the customer base and growing market share. This growth-oriented goal values revolutionary change, external focus and accepts risk for the opportunity for great rewards. After an open discussion, they each discussed the facts, events, observations, and evidence that drove their thinking about their priority or desired path for the future. During that exchange, the president learned that large corporate accounts

were being lost and the vice-presidents learned that the board had mandated the president's growth strategy to improve ROI. These insights defused some of the tension, but a division remained.

### **The Connection Between Organization Life Cycle Stages and Strategy**

The next step was to connect the organization life cycle stages and strategy. While the group was not familiar with the organizational life cycle model (Lippitt, 2014), they recognized it since it mirrored their product and project life cycles. They also knew that different actions were essential at each stage. After defining the six stages of organization life cycles as Birth or Start-up, Growth, Stature, Prime, Mature, and Renewal stage, I asked each person to select their organization's current stage. This discussion exposed the same split presented by the inventory findings. The president selected the Growth stage since it reflected his board mandate. The vice-presidents split between Stature and Prime. The tone in the room changed when they mapped their differing individual perspectives onto the organization life cycle model and talked about their reality. The group recognized the organization was past the entrepreneurial Growth stage with a respected brand and well-established policies. The firm was moving into the Prime stage where the focus revolves around process improvement, quality, and ROI. The premise that market growth was the only way to improve ROI was debunked.

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### **Bridging Differences**

The vice-presidents shared many additional internal issues that were unknown to the president. Problems, including quality issues, information system failures, and staff shortages, were undermining productivity, morale, and quality. As the president absorbed this key information, he understood his staff had rejected his fast growth strategy since the loss of major accounts stemmed from operational flaws rather than competitive factors. While the president had assumed that the vice-presidents were driven by personal motivations, he now realized it was due to current circumstances. His demeanor changed. He listened and learned what was holding the organization back from the success everyone wanted. He also realized that before the organization could grow, they had to halt the hemorrhaging of major accounts. It did not take long before an internal improvement strategy targeting operational flaws was formalized. The team agreed, when this strategy was achieved, they would develop another plan based on newer vital needs.

### **Conclusion**

Once they agreed on their goal priorities, the executive team estimated the financial impact of the lost accounts on their bottom line. They developed a pitch for the Board that showed the importance of addressing quality. They also agreed a new strategy would be presented after quality concerns were addressed, and that the next strategic

thrust might be market growth, assuming the situation warranted it.

The president's presentation to the Board highlighted the fact that getting new customers and then having them leave due to operational shortcomings not only wasted marketing efforts but also impacted the brands' reputation. After all, dissatisfied customers not only stop using the firm but also spread their negative experience with others. The Board accepted a "build it and they will come" approach to meet current challenges and improve ROI. A once dysfunctional team coalesced around a shared reality and the need for results. Personal attributions were superseded by shared common results-oriented goals.

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“A manager who recognizes their biases yields better results by building a diverse talent pipeline and leveraging the collective and varied perspectives within their team. The rewards can be immense.”

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## Uncovering Bias to Discover Go-To People

By David Hosmer

Go-to people are awesome. Organizations should have more of them. Managers leverage Go-to people when they need to get something important done or delegate special projects. A few characteristics Go-to people possess include:

- » Produce results and meet almost impossible deadlines.
- » Navigate organizational networks to get results.
- » Earn respect and trust.
- » Accomplish goals rather than make excuses.
- » Overcome roadblocks.
- » Understand internal politics.
- » Are willing and capable even with limited bandwidth.
- » Think creatively about solutions.

There may be more Go-to people in your organization than you currently see. However, managers might need to peer through blind spots to find more of such talent. By becoming aware of biases and challenging decision-making thought processes, managers can develop more Go-to people.

Organizations can have more Go-to people, however, unconscious barriers lurk to impact hiring and other talent-related decisions. Numerous studies show biases flow in the undercurrent of organizations.

A case-in-point study was conducted with higher education in which staff were asked to review applications (Moss-Racusin, Dovidio, Brescoll, Graham & Handelsman, 2012). The applications were identical except for the gender of applicant names. Findings disclosed that reviewers were more likely to rate male candidates more favorably than females for qualification, hiring, and higher starting salaries. In another study, the National Bureau of Economic Research found applicants with disabilities received 26 percent fewer expressions of interest. Additionally, biases have no geographical or group boundaries. “67% of the British public admits to feeling uncomfortable talking to a disabled person; gay and lesbian job seekers are 5% less likely to get an interview; and 80% of employers admit to making decisions based on regional accents” (Long, 2015).

Implicit biases also overflow to those we serve in business. For example, several worldwide studies found a correlation between implicit biases among healthcare professionals and disparities in quality of care. Biases involved patients representing several groups—race/ethnicity, gender, socio-economic status, age, mental illness, weight, AIDS, brain injured, drug users, disability, and social issues.

Biases are not limited to obvious physical characteristics. Our brains even react when others remind us of past favorable and unfavorable life experiences, such as, “She went to the same high school as me.” or “He has that annoying accent like my former boss.” Humans are naturally biased. Although we cannot eliminate biases, there are steps managers can take to mitigate the influence of biases while developing and leading organizations.

### Mindful Inclusion

Imagine a culture full of Go-To employees. By being more mindful about inclusion, managers might discover hidden potential Go-To talent. Mindfulness is “The practice of maintaining a nonjudgmental state of heightened or complete awareness of one’s thoughts, emotions, or experiences on a moment-to-moment basis” (Merriam-Webster Dictionary). Here are eight managerial practices for more mindful inclusion.

1. **Be thoughtful in advance.** Psychological research reveals people size each other up in a blink of an eye (Willis & Todorov, 2006). Managers need to identify their own biases first and then be conscious to situations in which underlying biases could be at play. For example, decision points during the employee life cycle—hiring, developing, promoting, succession planning, and termination—are particularly vulnerable points. Before dismissing a potential Go-To person, managers need to be aware of their biases, and consider their thought process before deciding who to choose, even when measuring decisions against a list of objective criteria.
2. **Look beyond the known Go-to people.** Here are ways managers can uncover new Go-to talent:
  - Give remote and geographically dispersed employees visibility in meetings by having them share accomplishments and solutions.
  - Scan broad and deep within your team when selecting Go-to employees for higher-level responsibilities. Look beyond those already visible in leadership roles.
  - Expand ‘walk-arounds’ to meet and engage team members with whom you have limited visibility. By being more visible, you make others more visible.
  - When an employee does something extraordinary ask how they did it. You might learn how their skills and methodologies can lead to new responsibilities or teaching opportunities for new exposure.
  - Engage introverts. Some introverts will not assert their ideas but could yield solutions to difficult problems when asked. Engaging quiet employees might open new possibilities for Go-to people of a “different type.” Be mindful of your assumptions about quieter people. If you are thinking they are “stuck up” or have nothing to say, these assumptions are biases—conscious or unconscious.
  - Couple any of the above with meaningful development plans for all employees.
3. **Challenge yourself.** Do you lean toward people from your same demographic groups, e.g., religious, age, nationality, gender, race, or geographies? Ask yourself tough questions when hesitating to select individuals for vacancies, promotions, and developmental opportunities. What is your concern about delegating this assignment to Pat, for example? Is the concern a hunch, hearsay or from direct experience and data? Is there something about Pat’s background, perspectives, and education that is different from yours that makes you uncomfortable?
4. **Lean into discomfort.** Do you know your personality style and dismiss others that are not like yours? We tend to prefer people with similar physical and psychological characteristics as our own. Managers tend to hire, promote, and associate with people who are like them (Rock & Grant, 2016). Looking beyond your comfort zone affords you an opportunity to mine and develop potential Go-to people that might otherwise get overlooked.
5. **Watch your language.** When giving feedback or conducting performance reviews, use observations and behaviors, not judgment statements like, “She’s overbearing” or “He’s obnoxious.” Do you tend to think or use phrases like, “people like that” or “those people?” This language suggests a reaction of bias even if articulated only in your mind. For example, Marjorie, a younger colleague, is quite opinionated and tends to disagree with you. You might think, “Young women think they know it all. They should be more agreeable and respectful.” This generalization might be a conscious or unconscious bias against millennials, women or both.
6. **Go to the grey area.** Are you uncomfortable with ambiguity? Do you usually think in absolutes such as determination of what is right or wrong? Perhaps you could be more open to different ideas unlike yours. How is your reaction to Marjorie similar and different from reactions you have to Pat, and other colleagues? Why?
7. **Involve others.** Gain input from others to allow you to move from your own perspective and offer balanced performance feedback. Involve diverse interviewers when filling vacancies. Use calibration meetings across the organization to identify high-potentials and create succession plans. Input from 360-degree instruments can also yield perspectives beyond your own.
8. **Tap objectivity.** Performance metrics such as writing samples, editing documents, writing code, solving

problems, etc. can be used for selection combined with any of the above strategies.

A manager who recognizes their biases yields better results by building a diverse talent pipeline and leveraging the collective and varied perspectives within their team. The rewards can be immense. A 2015 McKinsey report, *Diversity Matters*, found that in 366 public companies, those in the top quartile for ethnic and racial diversity in management were 35% more likely to have financial returns above their industry mean. Those in the top quartile for gender diversity were 15% more likely to have returns above the industry mean. Imagine the innovative possibilities of an organization full of diverse Go-to people.

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