

# Appendix B

## **ROOTS OF THE HEADROOM CONCEPT AND RELATED METHODS AND TOOLS**

The practice of Headroom has grown out of the influence of several strong players across multiple knowledge fields. We have integrated many of their concepts into knowledge clusters and hybrids on which we stand. It is from this network of knowledge that our work is evolving, and so we wish to acknowledge the general use of their theories within our practice.

In addition to the stages theorists selected for recognition in Appendix A, we add the work of these pioneers:

- Learning theories of Chris Argyris, Donald Schön, Peter Senge, and David Kolb
- Change approaches represented by Michael Beer and Nitin Nohria
- Organizational development work of Lee Bolman and Terrence Deal, and Kim Cameron and Robert Quinn
- Business and organizational strategy of Henry Mintzberg, Michael Porter, and Dave Ulrich

Following is a sampling of tools that support our work in creating Headroom in the leadership culture. These select tools feature developmental action inquiry and interdependent organizing, a subset of our organizational leadership development

tools, featured in our joint work with Bill Torbert (McGuire, Palus, and Torbert, 2007):

<i>Method or Tool</i>	<i>Description</i>	<i>Source or Reference</i>
Difficult Conversations (two-column exercise)	Examining the assumptions, frames, and feelings left unspoken in a conflictual conversation	Argyris, Putnam, and Smith (1985); Senge and others (1994)
Learning Pathways Grid	Systematic analysis of a difficult conversation in terms of actual versus desired frames, actions, and outcomes	Taylor, Rudolph, and Foldy (2006)
LDP (Leader Development Profile) instrument with coaching groups	Assessment of individual action logics, supported by trained coaches and peer dialogues	Rooke and Torbert (2005); Cook-Greuter (1999, 2004)
Mapping organizational action-logic history	Understanding LDR (Leadership Development Resources) by tracing its history of development in action logics	Torbert and Associates (2004)
Culture Mapping Tool	Group exercise in which the “Culture Crew” at LDR mapped, and reflected on, their appraisal of the organization’s actual and desired culture, according to two dimensions and four types	Cameron and Quinn (1999); Slobodnik and Slobodnik (1998)
Business Process Analysis and Mapping	Analysis of value-creating activities for specific products and services and aligning them into a “value stream” while eliminating activities that don’t add value	Womack and Jones (2003)

(Continued)

<i>Method or Tool</i>	<i>Description</i>	<i>Source or Reference</i>
Culture Evaluation Tool	Survey instrument developed at LDR for assessing the relative strength of current organizational action logics; used as an internal assessment at LDR, with coaching	Ongoing research at LDR
Team Workstyle Continuum	Tool that helps a team self-assess current and future required functioning on a continuum from earlier to later action logics; used in the LDR culture-change discovery process	Tool created by LDR
Four Parts of Speech	Encourages framing, illustrating, advocating, and inquiring for effective communication in support of collaborative inquiry	Torbert and Associates (2004)
Group Dialogue	Conversation models that support the construction of shared meaning through exploring diversity in assumptions and perspectives	Isaacs (1999); Palus and Drath (2001); McGuire and Palus (2003)
Visual Explorer	A tool that uses visual imagery and the resultant metaphors to mediate group dialogue	Palus and Horth (2007)
First- and second-person journaling	Research staff keep personal as well as group journals of observations and experiences related to projects	LeCompte and Schensul (1999)

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Body Sculpting of Roles and Relationships	Group workshop exercise in which people from diverse roles in LDR collectively, physically modeled their actual and desired interdependencies with each other, using physical postures in relation to one another as a metaphoric device to support group reflection	Moreno (1977)
Culture Walk-About Tool	LDR-designed ethnographic tool to capture subjective and objective observations in first-, second-, and third-person modes	LeCompte and Schensul (1999)
Open Space Technology	A tool for establishing effective affinity groups amid diverse interests; used in a variety of ways at LDR, including forming discussion groups at workshops and seeding idea communities	Owen (1997)
Idea Communities	Interest- and passion-driven greenhouses of future Research and Development efforts, leading in some cases to fully established communities of practice	Lave and Wenger (1991)

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Source: Adapted from J. McGuire, C. Palus, and W. Torbert. "Toward Interdependent Organizing and Researching." In A. B. Rami Shani and others (eds.), *The Handbook of Collaborative Management Research*. Thousand Oaks, Calif.: Sage, 2007. Used with permission.