



Moving Beyond Human and Organizational Incongruence

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Abstract

Purpose – The purpose of this paper is offer an understanding on how value creation, on both a human and organizational level can be found and constructed through a shift away from

Design/methodology/approach – The paper describes theoretical foundations on the concept of congruence and it purports to demonstrate the co-relation between incongruence and dysfunction in both organizations than individuals.

Findings – The congruence theory, originally developed by Williams, co-author of this paper, refers to the capacity of individuals to align the individual stances to the organizational ones, thus leading to a system based on a system of balance among elements, conceptually paradoxical among themselves. The paper manages to demonstrate that performance needs to be found in system of reference other than the fiscal or financial diligence and more within the human dimensionality.

Originality value – This paper explores the factors that block the creation of congruence in people and organizations and explores strategies that can simultaneous and congruently move people and organizations to a path of sustainability

Keywords human sustainability, congruence and system thinking and theory

Paper type Conceptual paper

Creating a Context for Dialogue:

Developing a short treatise on congruence and sustainability may be seen as a daunting task. Daunting in the eyes of many, because on the surface, the two thoughts – congruence and sustainability – can be seen as anathemas to one another when trying to discuss healing and connected actions between people and organizational systems.. Yet, the overarching purpose of this short treatise is to demonstrate the connection and pathway for understanding people in the world of work and play, and to give a congruence perspective for the development of sustainable thought and action in the lives of all.

Congruence and sustainability are two terms that are often viewed as “apples and oranges”. Congruence focuses on the ability of people and systems to align perfectly ensuring that words, actions and thinking match (Williams, 2002; Eckstein, 1997). Sustainability has historically been viewed as the tenuous balance in nature to ensure that life and nature are balanced for the long term (W. Li, 2005) Yet, when viewing these two concepts holistically, what has been considered anathemas...the human being versus the natural world...actually represent the true connectivity of humanity and nature.

In *Creating the Congruent Workplace* (Williams, 2002), *congruity* and the process of *becoming congruent* was defined as the creation and embracing of balance, alignment, integration and transformation as the key anchors in understanding and reframing who we are, how we think, when we act and what *context* drives our personal and professional development – our being if you will – versus the compartmentalized *contents* and sound bite *processes* that drive living and corporate survival (p. xvii). The

perspective from the definition focused on the thoughts and actions that often drive performance. When persons were asked to narrow their approach, provide their professional history in one page, give information in bullets, think only as the team thinks, dress only as the organization perceives, look like the predominant culture; each component of the required actions marginalizing humanity and its uniqueness. Revisiting this shall occur later in this treatise.

Sustainability, according to latest researches, is generally defined as a system concept relating to the continuity of economic, social, institutional and environmental aspects of human society, as well as the non-human environment. Sustainability is a means of configuring civilization and human activity so that society, its members and its economies are able to meet the needs of people while preserving the biodiversity and natural ecosystems and planning an acting for the ability to maintain these ideals in a very long term.

Contextually, boundaries are created when dialogues occur on sustainability and congruence. The chart, following, details boundaries that frame dialogues on the two concerns.

SUSTAINABILITY BOUNDARIES	CONGRUENCE BOUNDARIES
Addressing cautiously risk, uncertainty and irreversibility	Clarity in all thoughts and actions
Ensuring appropriate valuation, appreciation and restoration of nature.	Collaboration as the baseline of self with others
Integration of environmental, social and economic goals in policies and activities	Complements or Anchors that ensure balance in thought and deed
Equal opportunity and community participation	Choices that effectively utilize beliefs and values to remain balance and in sync with

	self.
Conservation of biodiversity and ecological integrity	Constants that create synergy and comfort with choices and decisions.
Recognizing the global dimension	Consequences that drive adherence to personal and communal values and beliefs deemed critical
A commitment to best practices.	Change practices that adhere to underlying beliefs and values
No net loss of human and natural capital	Capacities that drive pathways for movement to expand and grow
Adhering to the principle of continuous improvement	Culture that sets the baseline for thinking and action; ensuring that beliefs and values are culture centered
Good Governance	Congruence that all the characteristics that drive harmony are centered in the person as an internal reference point.
(http://en.wikipedia.org/wiki/sustainability)	(Williams, 2002)

Table 1: *The boundaries of Sustainability and Congruence*

The most poignant realization becomes the foci of the dialogues. Explicitly, congruence seems to focus on the internal referencing of humanity from an inside-out perspective, while sustainability's focus is on the external referencing of society and culture. Unfortunately, dialogues that occur among business, educational, government and community leaders often focus on the external concerns of sustainability without the inclusion of congruence, the essential characteristics of human interaction and human sustainability. To that end, the dialogue occurs here.

Balancing Sustainability and Congruence:

As the dialogues that historically and currently occur among business, education and governmental decision makers when issues of sustainability arise focus on the external factors of human and organizational performance; rarely is completeness a result

of the discussion. This is not an indictment of the concept of sustainability, rather, the shortsightedness of the decision makers. The process of creating sustainable change, personally and organizationally, is about the understanding and creation of reasoned balance and alignment, a strategy that I call congruence building. This process explicitly focuses on creating a metanoic shift - a change in thinking- that establishes- different outcomes for the work, growth and change within organizations and among people. The Society of Human Resource Management says that “employees will spend more than 70% of their year at work in the United States and somewhat less in Europe and more in Asia”. If that assessment is true, then organizations and their leaders are challenged to create a more balanced life that is aligned with the long term, sustainable needs of the employees, the community in which they reside, and the networks essential to healthy communal living, as well as attending to the critical issues of organizational success and sustainability. What blocks that movement is often the thinking and practice paradigms of organizations, leaders and stockholders. What would the shift look like? How would one shift their thinking? Where could one explore honoring self and others? Where would one develop a sense of culture and society? What is the key to understanding these issues? The key is Congruence Building; a new approach to personal, organizational, and business systems development.

We continually believe that we can separate what we do at work from who we are in the privacy of our lives. What we achieve instead is (1) lack of clarity about who we are and what we do, (2) an inability to effectively collaborate with one another because the rewards of individuation outweigh the nuances and enlightenments of joint or

collaborative efforts and ventures, (3) a lack of awareness of the complements in our lives that create effective anchors for risking the development of change, (4) a retreating from creativity and change, (5) an abdication of personal and professional choice that creates codependency and systemic morose and the desire to make life and work simple, (6) an inability to understand and embrace complexity which enriches and challenges us to go beyond the known and conscious to the unknown and unconscious to bridge the past, present and future to be fully present in our personal and professional lives. What organizations have lost is their direction, their connectivity to the entrepreneurship that created them, and to their responsibility to their partners - the people. What we have lost and need to create is congruence in our personal and professional lives, the seventh paradigm and in so doing, we create the capacity to develop sustainability in our lives and in our work. We ensure that organizations, governments, communities and individuals all focus on the concepts of sustainability and congruence as essential for human and societal development.

One might ask what this focus on congruence and sustainability has to do with business and organizational development; with governmental success and societal cohesion. Paradigmatic thinking is critical to business and people development. Whether classical [no chaos, tight boundaries, company person], scientific dynamic [cause and effect driven, blame and shame – not my fault type of person], communication cybernetic [data driven to the point of no decision – give me more information to get it right type of person], field [test processes for decision making – prove it to me/show me type of

person], evolutionary [change for change sakes – change now – change every day type of person] or process thought driven [a balance and alignment in thought and action to the outcomes necessary – if it works and if it moves me and others type of person]; the underlying thought process impacts, empowers, influences and directs the actions of organizations (Williams, 1996, 2002; Gibb 1982; Friere, 1999). When that thinking is compartmentalized, controlled, boxed; when that thinking is designed to protect and limit, rather than understand and grow, the process of imbalance, misalignment and incongruence occurs and people and organizations are the ultimate loser!

As stated earlier, congruity and the process of becoming congruent is the embracing and creation of balance, alignment, integration and transformation as key anchors to the understanding and reframing who we are, how we think, when we act and what context drives our personal and professional development, our being if you will, versus the compartmentalized contents and sound bite processes that drive American living and Corporate survival, and unfortunately more and more, global living and corporate survival. When one is asked daily to narrow one's approach, provide one's professional history in one page, provide all information to the leaders in "bullets because they will not read", think only as the team will think, dress only as the organization perceives appropriate dress, look as European Americans look in order not to offend or threaten; we are continually participating in strategies that dishonor the uniqueness and the congruence of each person for the sake of an ideal or belief that has little place in a world of Global Diversity and Global Differences. Everyone is asked to create more imbalance and misalignment in one's lives and the cost is the loss of the critical

congruence essential to the fluidness and flexibility essential to organizational and business growth and development.

THE NEED FOR CHANGE:

Each and every day, organizational leaders report difficulties in their quest to create strategies that work, without an increase in dysfunction among employees of the organization (National Bureau of Professional Management Consultants (NBPMC) 1999-2004 Annual Reports). The issues cited that seem to contribute to the plethora of problems or barriers that haunt organizational leaders include:

- a lack of understanding of the organizational strategies by managers, thus, impacting the comfort levels of the employees charged with performing the strategies;
- development of strategies that focus on one part of the organization without recognition of their impact on other areas of the company, creating problems that formerly did not exist;
- continuation of unresolved issues, or one-way decisions, that only favor the organization, creating areas of mistrust and discomfort that prevent managers from effectively planning or developing strategies to resolve the organizational and human issues;
- differing mindsets between executive managers and descending levels of accountability within the organization, creating tangents in strategies that veer off track from plans of the leaders; and

- unclear or unsafe strategies that set employees up to fail, creating strategies for protection of employees rather than success of a product or service (NBPMC 1999-2004 Annual Reports).

Each issue seems to impact the healthy and sustainable development of organizational strategies. In addition, numerous theoretical concerns dating back to the periods of Karl Marx, Max Weber and Emile Durkheim regarding the role of the distribution of labor versus the needs of organizations impact the successful development of balance strategies within organizations. The initial understandings in our society of how and why division of labor should exist emerged from their writings, setting both the stage and the standards for modern-day thinking. However, there has been a continual division between people and organizational systems that continues even as this writing is being penned.

What is the real issue before us? What makes it hard for employees, managers and leaders to embrace one another to create strategies for success and sustainability? Somehow, there is a perspective that there is no tangible connection in the minds of managers, leaders, employees or even theorists, that connectivity *must occur* between the actions and thinking of people and between the strategies and structures of systems. That is the underlying premise of this dialogue on congruence and sustainability.

In the book, *The Congruence of People and Organizations* (Williams, 1993) the focus began on the issues of connectivity between people and systems. To address that connectivity, the issue was approached through the underlying values and belief systems

that are created within organizations and societal systems. In *Organizational Violence, Creating a Prescription for Change* (Williams 1994) a strategy was presented to address the actions and thinking of organizations that create separation among employees. The premise of the book was that inconsistency of thought and action of organizational leaders create a sub-paradigm of systemic violence impeding the ability of employees to act, thus reducing the effectiveness of the organization as a whole. In *Business Decisions, Human Choices: Restoring the Partnership Between People and their Organizations* (Williams, 1996) focus on the integration of people and system issues to create an effective pathway for change and development was the direction of the book. The book introduced the Trinity System (the connection of people, business systems and congruence characteristics) and focused on the integration of Context, Content and Process as strategies for change.

What has grown out of 33 years of consulting practice, research and publication efforts is the belief that incongruity occurs, between people and organizations and among people within organizations instilling a less than sustainable strategy for long and short term performance of people and systems. When there is inconsistency between role prescription and role behavior in the organization setting, both the organization and the person become disconnected, disjointed and dysfunctional. Such inconsistencies create historical and systemic dysfunction in organizations.

To test this belief, a Congruence Development Model was developed and published in *Business Decisions, Human Choices* (Quorum Books,) in 1996. The model is a dual-process paradigm that requires the utilization of business and human

characteristics to create effective alignment of thought and action in organizations, its leaders and managers. The model consists of six characteristics in each of two paradigms that create opportunity and capacity for people to sense completeness in their decisions, and the implementations of those decisions. The two paradigms in the Williams Congruence Model are referred to as the Business Process Paradigm and the Human Process Paradigm (Williams, 1996). The purpose of the paradigms, was to establish connection points, for thought and action in business and human behavior, that create the emotional and systemic tensions necessary for change. The more connectivity between thought and action, the more congruence between people behavior and organizational performance, the more sustainability occurs between societies, governments and people..

STATEMENT OF THE PROBLEM

Lived experiences of employees within organizations are often discounted as valid expressions of meaningful information that can be used by organizations and leaders to create change, movement and direction within an organization. Executive decisions are most often based on quantitative data provided by departments on performance and research within organizations. There are, however, other sources of information available to organizations as they prepare strategies for change, growth and development. These information sources include e-mails, memos, reports, retreats, focused discussions, and other records of interactions within an organization. Organizations historically rely less, if at all, on these records of interactions to provide a lens of understanding about what happens within the organization. As a result, valuable

qualitative data, generated from the lived experiences of managers and executives often take a back seat to more traditional quantitative data.

Every employee has a source for data collection. They are the conversations, coffee breaks, rumors, family experiences and dialogues that inform and shape the thinking while impacting the actions taken by people in work and play. These informal, non scientific data sets often influence the direction and actions of people more than the quantitative information that is available. Consider the number of times people have said – *“they can make numbers say anything – I don’t trust their data – they didn’t ask me, so they don’t consider what I have to say as important”* In those statements is embedded the power of phenomenological inquiry – lived experiences – that are often not used in organization choices.

Within every organization, phenomenological (lived experiences and appearances) and hermeneutic (biased interpretive) data exist that can impact the thinking and actions of managers. What is often discounted is the utilization of these data to enrich and streamline the actions of organizational leaders in the decisions before them. These data were often suspect, and therefore, were considered anecdotal – not for business consumption. Safety was generally the norm and quantitative information was generally the answer to data required for decision-making, structure development, environmental happiness or manager/employee satisfaction.

Corporations, governments and non-profits – in fact most organizations – are continually faced with struggles to develop approaches to achieving outcomes defined by

organizational leaders and stakeholders *without* destroying the employees and managers charged with accomplishing those outcomes. Research (Burke, 1997, Mallinger, 1997, Maier 1997, Jennings, 1998) suggests that some strategies of organizations may create disruptions in the behavior and thoughts of employees and managers, thereby, reducing the effectiveness of that organization. Burke's research focused on ethical issues; Mallinger's, on decision making; Jennings', on gender and employee performance, and Maier's research focused on organizational transformation and its challenges in corporate strategy. Each researcher stated that there was a *central core missing* in creating organizational effectiveness.

Questions abound regarding the causes of organizational failure from Senge, Covey, Burke, Bennis, Sommerville, Goldsmith and numerous other researchers and writers. These questions center on development of a core understanding of what creates organizational and employee success. Each speaks to the need for alignment of people with organizational outcomes; *none state what that sense of alignment or balance must look like*. As this discussion among theorists continues to evolve, it is believed that focusing on the concept of balance and alignment will generate the necessary strategy frame for how managers and organizations can create a better path for organizational and managerial success. It has been learned through years of consulting, that the lived experiences, stories, and accounts of employees are an important vehicle for discovery. Even with that belief, however, developing a perspective to identify or describe the issues without numbers was difficult.

The challenge in such an application is determined by the definition of terms used to frame the issues for exploration and discovery. *The challenge in this writing has been the exploration of a concept of congruence and sustainability applied to the development of more effective managerial and organizational performance, through the use of a thematic analysis methodology.* The challenge was predicated on the assumption of a gap between organizational and people development postulated by Daniel Goleman in his book, Emotional Intelligence (Bantam Books, New York, New York, 1995; pp. xiii-xiv), where he said,

If there is a remedy (to the dysfunctions of people), I feel it must lie in how we prepare for life. At present we leave the emotional education of our children to chance, with ever more disastrous results... I can foresee a day when education will routinely include inculcating essential human competencies such as self awareness, self control, empathy, the art of listening, resolving conflicts and cooperation.

In the Nicomachaen Ethics, (a philosophical enquiry into virtue, character and the good life) Aristotle's challenge is to manage our emotional life with intelligence.

Our passions when well exercised have wisdom; they guide our thinking, our values, our actions, and our survival. The question of appropriate emotion is essential to effective being in the workplace, in society, and in our own lives. Somehow we have lost that connection, and in that loss, we have removed from our

thinking and acting the necessity of emotion in our decisions and
in our practice.

In effect, *congruity* and *sustainability* become the connection for thinking, feeling, acting and becoming.

Goleman's research and statements were explicitly directed at the actions of individuals; however, organizational leaders and managers are also confronted with the issues of human emotion, competencies, group and team awarenesses, team and individual control, and the resolution of conflict. Goleman's statement speaks of the relationship between the structure and functioning of the human brain and human emotions and, thus, the consequences (of this relationship) for human behavior and development as individuals and as groups. By implication, Goleman asserts that individuals, teams, businesses, governments, societies and cultures have a lack of understanding of this relationship and its impact on human learning and behavior. Further, Goleman asserts that one's lack of understanding of the brain/emotion relationship and its impact on or consequences for group and individual development and behavior is the missing piece of our definition of human intelligence, thus, causing a deficit in the education of the young. It seems fitting, therefore, to use Goleman's analogy to support the direction of this writing. If there is a connection between the human brain and emotion, can there be effectiveness in organizations without congruence and sustainability – as an analogy to Goleman's perspective? Can there be movement in the world of business through compartmental actions – disconnected actions, or does real movement require some level of understanding of both the concept of congruence and

congruent actions and the strategy of sustainability and sustainable actions, in the creation of strategies for change and development? Can congruence occur within organizations if only the needs of the organization are met? If the needs of employees are also essential to the success of the organization, how might the organization ensure the balance and alignment of the employees and the organization to create effective sustainability? Can analysis of lived experiences yield the necessary information that governs the future of organizational change and development?

Similarly, can individuals achieve personal congruence where they sense that their sustainability in the workplace is based on acting like everyone in the workplace when they don't perceive themselves as being themselves? What happens to personal/individual contribution in the workplace when one must operate through a personal facade? If one's family operates from a communal value set, yet the workplace focuses on individuation; what happens to one's ability to contribute?

A 2000 study conducted by the American Society for Training and Development examined the average annual training expenditures of more than 500 US based publicly traded firms. The study concluded that firms in the top half of the group (i.e. – firms that spent the most on training) had a total stockholder return 86% higher than firms in the bottom half – and 46% higher than the market average. Studies such as this revealed that the right kind of investment in people generate exponential returns. Yet, what happens each time the stock market hiccups? Look at any paper from any city, state, country or international marketplace and one will discover massive layoffs from corporations,

increases in the compensation for executives because they cut people. When is there a review of the strategy? When does the concept of congruent and sustainable action drive the decision making of organizational leaders? Business, governments, educational institutions, service organizations and corporate entities are at that crossroad.

Creating Greater Sustainability and Congruence:

Given the aforementioned perspectives, one might consider exploring strategies that can move people and systems toward greater sustainability and congruence. First, one begins with an exploration of that *internal and external referencing factor* in one's life and actions. People throughout the globe are used to the external references that guide their action and thoughts. From educational institutions to governmental actions, others consistently state what is appropriate and right in the lives of human beings. These external references become ingrained to the extent that often people are unaware of what truly drives their thinking and feelings, their being. In Cuba, the external reference points of Fidel Castro and his perspective of Communism drive what is allowable in the minds, feelings and actions of the citizens of Cuba. In Africa, tribal edicts dictate what people of nations can consider as appropriate thinking. In America, the religious right and the conservative agenda work diligently to force Americans to see the world through an extremely conservative lens and often establish punitive outcomes for those with a liberal ideology. Throughout the world, addressing global warming through the lens of countries and nations that believe that nothing is proven, thus nothing is wrong, rather than adhering to the internal voice of each person who believes that what is seen represents a departure from sustainable action are all examples of external referencing.

In the business world, group think (Janus) and a focus on the leaders and the strategy that demand that all appear and act the same is another form of external referencing. To move toward congruity and sustainability, one understands the external influences of a leader, boss, organization, government or family history; yet balances that external reference with internal referenced thoughts. The concept of individuation, thinking for one self, thinking according to guiding principles, living by one's values and beliefs, acting congruently where who one is matches what one does...are all internal references that can make a difference in how one proceeds in a world that often seeks to block uniqueness and individuation.

Second, one seeks *clarity* -- to understand what is clear and unclear about the life one experiences. Where is the confusion, the dissonance, the discomfort, the unspoken that creates disruptions in the thinking and feeling. Where has the process of gaining clarity fallen short of one's expectations and was the shortfall based on fear of consequences, or the lack of data that was required for clarity to emerge. In delving further, were the actions, behaviors, expressions of thought consistent with the intellectual, emotional, social and spiritual realms that have heretofore appeared congruent? Were the actions too misaligned? What bargains have been agreed to that add to the obfuscation?

Third, if the old adage of "man is not an island" holds true, are actions and strategies focused on the creation of collaborative actions between self and others; or is *collaboration* an ideal, not a planned requirement for success. In today's business environ, much is heralded as essential about teams. Teams are seen as the coup de grace of successful business. In family businesses – family sustainability holds that same place

of honor and criticality. The underlying perspective is that strength and wisdom are uplifted when more than one person, one ideal, one value is tested by the internal and external reference perspectives of members of a team, a family, a group, or a community.

Fourth, *complements or anchors* must be identified to ensure that when stressed to the point of abdication of a point of view that is centrist, one does not falter and lose footing essential to self-identity. One is often unsure of critical anchors that govern a perspective and belief. For some it is religion, for others family, for still others, past experiences; yet the concept of a complement allows one to stay on a path of sustainability or congruence. Fifth, *choices* are essential to personal and systemic ownership. Just because a business wants to “rape critical minerals” does not mean that all businesses must follow suit. Sustainable and congruent action is always about the choices made and the perseverance that drives that choice. Too often, choice does not come into the decision processes, because organizations and their leaders have overcommitted to an idea or strategy, even when they recognize that the return on investment is less than desirable. Sixth and critical for the levels of understanding is the concept of *constants*. Reliance on a perspective that some things will remain the same is essential to the risking nature of being congruent or acting in a sustainable manner. The idea of constants is also the forgotten or overlooked perspective in some field so sustainability. The President of the United States believes that his environmental and foreign policies will be constant that ensure a sustainable future for the planet and for the concepts of democracy. However, not understanding, exploring, dialoguing with others about their perspectives, their beliefs and assumptions can lead to disruptions of the constants because others may see the actions as anathemas to their own sustainability.

These six perspectives drive the *context analysis* that one considers when seeking to create congruent and sustainable actions from an internal and external reference system. Whether institutional, economical, financial or ecological sustainability; the analysis along congruence theoretical strands becomes essential to the concepts of sustainable thought and action; congruent thought and action. The two perspectives are irrevocably connected to one another and live collaboratively in the process of business and social development.

Understanding context analysis alone as a method of creating sustainability and congruence is insufficient to reach success that lasts. *Content analysis* is required to ensure that balance that is necessary for sustainable and congruent thought and action.. Content, for the purposes of this dialogue, focuses on the specific factors that often alter and derail strategies planned by organizations, families, communities, and leaders because attention to these areas are costly, time-consuming, and often of critical concern that inhibits performance and strategic direction.

Areas of concern for content analysis are *consequences, change, control, capacities and culture*. *Consequences* represent the actions that interrupt planned action when individuals and organizations make choices to operate “outside” of the congruent values, beliefs and assumptions that maintain the balance of congruence and sustainability. *Change*, in the content arena, focuses on the inappropriate actions and thoughts instituted by leaders to gain the antithesis of change – *control*, where boundaries are strictly created to ensure that everything remains as it has been allowing no growth and development within the system or among the people. *Capacities* represent the opportunities that exist

for individuals, groups, teams, organizations, societies, and cultures to expand the sacred cows and totems to build new directions and expansions of existing knowledge. *Culture* represents the histories and traditions that frame the world-view that drive thought and action. The process of congruence and sustainability requires explorations of both context and content analysis to frame and identify pathways that allow for growth and movement, balance and alignment, movement from stagnation for people and systems.

Recognizing these characteristics and factors allow organizations and people to focus on the development of relationships that build new world-views that can shape new futures, new realities and new pathways for understanding and relationships.

The Future:

The crossroads that block incongruence have now been identified. Each person has the opportunity to create newness in their work and play. Each organization has the opportunity to identify the steps critical to sustainability. The realization of sustainability and congruence is based on the risks and challenges that one, no all can take to be fully present with self and others. Congruence – the balance of who one is with what one does – is always available. Only through challenging what is can one discover what can be. The challenge is up to all of us!

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