

Commentary from the Field

In Memory of Ed Schein

From Accessing Your Ignorance to Accessing Your Love

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Edgar H. Schein, Sloan Fellow professor of management emeritus at MIT, passed away on January 26, 2023, at the age of 94. Ed had an enormous impact on organizational development (OD), on Theory U, and on my life.

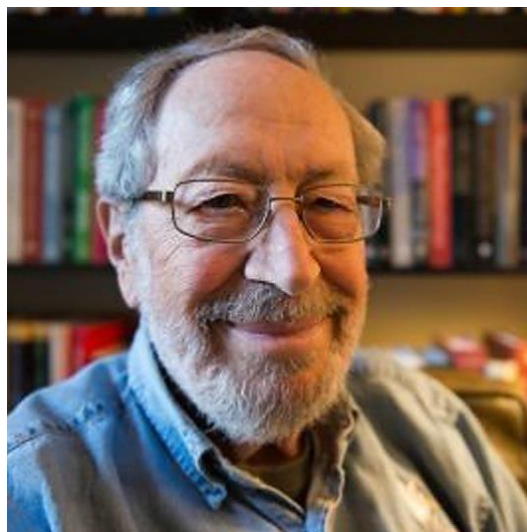


Figure 1. Ed Schein (Shared with permission of Louisa Schein).

Schein was born in Zurich on March 5, 1928. His father was a European Jew with a German name, a Hungarian national background, and a Czech citizenship who earned his PhD in physics at Zurich University, Switzerland. His mother, a Lutheran from Dresden, Germany, was also studying for a PhD in physics. In 1934, after Switzerland ended job opportunities for Czech citizens, including for his father, the family moved to Odessa. Having spoken only German at home, Ed learned to speak Russian when he started school. After Stalin dialed up Russification and Ukrainian suppression, Ed's father had the foresight to leave Odessa for Czechoslovakia, and then, realizing the immediate threat from Hitler, moved the family from there to Chicago, when Ed was 10.

After college, Ed, then a PhD student at Harvard's Department of Social Relations, entered the U.S. Army's clinical psychology program to avoid being drafted into the Korean War in the early 1950s and to garner funding for his research. In 1956, after earning his PhD, he was recruited to MIT by Douglas McGregor. Schein wrote dozens of books on social science subjects, including career dynamics, organizational culture, leadership, process consulting, and group dynamics. He is one of the most important founding fathers of organizational development (OD). His three-tiered model of organizational culture (Schein 2017) and his writings on building helping relationships (Schein 2010, 2013, 2014) are used by managers and change makers worldwide.



Figure 2. Collage by Louisa Schein on the occasion of Ed's 90th birthday (Source: L. Schein).

The Teacher

I first met Ed when I arrived at the MIT Center for Organizational Learning in 1994. He taught a very popular class on change at the MIT Sloan School of Management. Taking that class was both eye-opening and life-changing for me. Ed had an amazingly minimalist teaching style. He did not give lengthy lectures. He never used a superfluous word.

Ed the teacher inverted the relationship between learner and educator. Normally that relationship is based on the professor knowing things that the students don't, a learning structure in which the professor conveys information and insights through lectures, discussions, and readings. But in Ed's classes the relationship between learner and educator was based on what *learners know without realizing it*, a learning structure in which the educator coaches the learner on how to access those deeper layers of knowing.

"You cannot learn how to manage change unless you do it." That's how he opened his first class, putting the students into the driver's seat of change. The students were in charge of advancing their own change initiatives, while the educator supported that process by providing appropriate methods and tools. It was unlike anything I had previously experienced in the classroom. In other words, Ed 100% embodied his own theory of process consultation in the way he reshaped his relationship to the students, to the class.

That was the eye-opening part. The life-changing part came when he offered me the chance to teach one section of the class. Because the class attracted so many students, and Ed insisted on keeping the class size to 30, he offered four sections, three taught by him and the fourth by me. I don't know what prompted him to offer that opportunity to me, but I guess he must have seen or sensed a potential or possibility. So, the way he taught me was by putting me into the role of the teacher. The way he coached me was by putting me into the role of the coach. You can't learn real stuff unless you do it...

Schein's Influence on Theory U

Ed's inverted pedagogy and insights on how to engage in any kind of helping relationship made him my most important teacher as I advised clients and stakeholder groups on how to rethink challenges facing their organizations and communities. He should be considered not only a founding father of OD but also of Theory U. You can see the Schein influence on at least three levels.

First, Ed's three-tiered approach to organizational culture works like the iceberg model in systems thinking, from the more visible layers at the surface (tangible artifacts) to the deeper and less visible layers beneath (taken-for-granted assumptions).

Theory U follows that same intuition and identifies four relationship levels (that apply to different qualities of listening, conversation, organizing, or

coordinating) that each embody a different quality of awareness and consciousness.

Second, Ed's teaching on change emphasized creating psychological safety. Theory U follows that emphasis by spelling out various types of sensing and co-sensing practices.

Third and most important, Ed's work and teaching have helped me and many others be more helpful and useful in the context of organizational change, consulting, and leadership. Here are the most important principles that Ed returned to repeatedly in his MIT classroom.

1. "Always be helpful."

This principle is foundational in all helping, coaching, consulting, and therapeutic professions. Unless you build a helping relationship, nothing else you do will be of much use. Writing these words today, I can clearly see the line of connection from ego to eco awareness in Theory U provided by the lesson to "always be helpful."

2. "Always deal with reality."

Ed elaborates: "I cannot be helpful if I cannot decipher what is going on in myself, in the situation, and in the client." In other words, we need a good read on the situational reality. In Theory U this principle is reflected in the primacy of seeing, sensing, and co-sensing. Theory U is not based on juxtaposing the existing reality with our vision and then forcing one to apply to the other. Instead, it focuses on building the capacity to decipher what emerges—and what wants to emerge—and to co-create with these nascent forces.

3. "Access your Ignorance."

This is probably the single most useful piece of advice I have ever gotten. When you are in professional helping situations—consulting, coaching, leading, teaming, partnering—framing questions from your not-knowing ("ignorance") rather than from your knowing ("expertise") are always more helpful.

"Access your ignorance" is a hands-on articulation of what in Theory U is referred to as having an Open Mind (curiosity). It directs your attention to the edges of your knowing—to your not-knowing. It de-centers your thought experience from areas of knowledge and certainty to not-knowing and being less sure.

In Theory U this *decentering* is expanded to two additional arenas of the human experience:

- Open Heart. Having an Open Heart refers to the decentering of our feelings (from the subjective to the intersubjective to the deep-intersubjective realm)—i.e., from feeling inside our subjective comfort zone to going to the edges of it, to sensing into the experiences of others and of the collective. Maybe Ed

would have referred to this kind of opening as “accessing your discomfort” or “accessing your heart.”

- Open Will. Having an Open Will refers to the decentering of our intentions and actions. It’s essentially about the capacity for navigating letting-go and letting-come, about surrendering to what wants to happen. Maybe Ed would have referred to it as “accessing your letting-go.” He did occasionally talk about a related principle that he termed “go with the flow,” which meant not holding tightly to plans, ideas, and intentions of the past, but rather always staying open to how a situation unfolds.

Another of Ed’s classic teaching points around the opening and decentering of the mind was, “when in doubt, share the problem.” It’s practical, succinct, and embodies decentering, which in this case means to shift the conversation from your head (should we proceed with plan A or plan B?) to a conversation with your group or client, whose context is more likely to inform the right choice or decision.

4. “Everything You Do Is an Intervention.”

This is another key principle that Ed liked to point out. In contrast to the traditional sequence of diagnosis followed by intervention, Ed said that everything we do, including diagnostic activities, is already an intervention in the existing system.

5. “Everything You Experience Is Data.”

We live in a data-driven economy. Data is what drives the success or failure of companies, regions, and economies. This generally refers to third-person data, the stuff you observe. Ed had a different take. As a social scientist and an action researcher, he believed it was of the utmost importance to pay attention to *all* the data we encounter and experience, including first-person and second-person data.

In Theory U-related work we pay a lot of attention to improving our methods and tools for accessing first- and second-person experiences. Cognitive scientist Francisco Varela once told me that in the West we have a blind spot in cognition science. That blind spot isn’t that we don’t know enough about the brain. The blind spot is about experience—how experience enters into our awareness. He said that we need to become “black belts” in accessing our first-person experiences. That’s the lineage that Theory U research connects with. And that’s why Ed’s principle that “everything we experience is data” matters.

To advance this research we co-founded the *Journal of Awareness-Based Systems Change*. Ed was a founding member of the editorial board. Here are his own words from an email he wrote to the board on his role and point of view:

“I come from a research in psychology career and have come to realize that the clinical psychologists who designed many of these

behavioral programs are themselves stuck in a culture of individualism and put a greater value on statistical studies that show some correlation between doing the programs and some mental health outcomes, while I have become convinced that the important changes that we are collectively seeking have more to do with the interaction of (a) the requirements of the situation we are in with (b) our conscious choices of how we will want to deal with that situation.

I say all of this to make it clear that my role on this board would be to continue to push that human systems are different, require different kinds of research and inquiry methods, they do not lend themselves well to quantitative and statistical research models, and rely much more on detailed case descriptions and structural models that are more metaphorical than physical. I have made an effort to describe what I call the clinical research method, which is to realize that we learn the most about how human systems really work when we have been in a consulting relationship where we were trying to be helpful. Perhaps the most profound thing that Kurt Lewin said about this is that ‘we don’t really understand a system until we try to change it.’”

He concludes his email by referencing an initiative that he launched on mobilizing fellow social scientists to address the global environmental challenges of our time by using OD and social change tools to build deeper collaboration capacities (Bartunek, 2022).

Call for Collective Action

Writing this piece on Ed has had an interesting impact on me. It has made me think more about some of the deeper layers of relationship that play into all human connections—between student and teacher, between mentor and mentee. Perhaps the most significant level is the simple fact of being seen. Being seen for who you really are, for what you are trying to do. Even though Ed and I never spoke extensively about my work in most of our meetings, I always had the feeling that he saw me and what I was trying to do. And everyone who has lived in a context of *not* being seen knows how critical this is when it is missing (the complete absence of being seen can be felt as a type of violence: *attentional violence*).

At MIT, Ed was perhaps the first one who really saw me. What makes me say this? At first, it was just a feeling. But in the past two years, that feeling became more clarified, particularly when Ed talked about what we needed to do in the decades ahead.

What was most important to Ed were always the practical applications of the methods and tools we develop—and how to bring them to scale. For example, when I shared the Presencing Institute’s most recent annual report with him, he

said, “I am absolutely blown away by all you and your team have been able to accomplish.” It was not just projects that achieved organizational or structural change that drew his interest, but their relationship to the interior shifts in awareness necessary for true transformation to occur.

In some recent public remarks, Ed summarized his views on Theory U and the work that has grown out of the Presencing Institute. On that occasion, Ed addressed me more personally as the recipient of an award from the OD Network, but since his words focused on what needs to be done collectively going forward, they should really be read as addressing the whole movement of Theory U-inspired systems change:

“As I've known you over the years, I have come to believe that not only are you one of the important theoreticians and practitioners who has brought us this far in the social science of humanization, but more importantly I really believe you [all] are our best hope for the future.... The thing that I most admire about you, and that I think will produce great results in the future, is that you work as a kind of integrator of both the intellectual side and the emotional side, and most importantly the action side: what we will actually do, what our *Will* will tell us to do.

I think this is now especially important because the environmental problem of global warming is very serious, and unless humanity figures out a different way to think, talk, and act about it, we will indeed fry together on a hot planet.

So I'm counting on you [all] to help us change our consciousness, our feelings, and our actions to keep us alive on this wonderful planet. I'm so proud that you are continuing to work on this!”

Access Your Love

On the last day of his life, Ed worked until 5 p.m. with his son Peter, before peacefully passing on in the evening hours. In his last Zoom call that afternoon Ed led a 2½-hour online session with the OD Network. He concluded that call with a farewell that I had not heard him express explicitly before, but that I had often felt he embodied in his actions and relationships, particularly in the later years.

“Love is what we bring to our clients. All the good we do comes from love.” Then he closed his remarks with “Enough said.”

Maybe that's Ed's journey and work in a nutshell: from *accessing your ignorance* to *accessing your love*.

Thank you, Ed, for embodying everything you taught me over the years—and for inspiring so many of us to continue the pioneering work you and your colleagues started in the 1950s and that since then has been joined and co-

evolved by so many others and has been reshaping the thinking and practice of organizational leadership, learning and change across the world.

Your final words to us—“I’m counting on you to help us change our consciousness, our feelings, and our actions to keep us alive on this wonderful planet”—were heard. They resonate profoundly. They will live on and increasingly resound in an emerging movement of change makers who use awareness-based practices to advance planetary healing and civilizational regeneration worldwide.

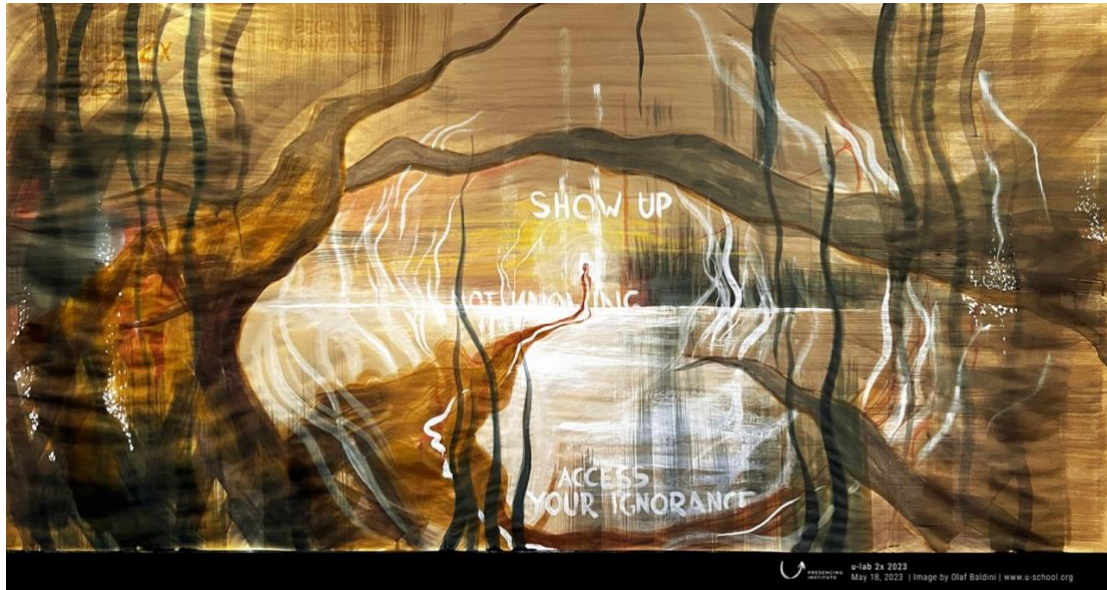


Figure 3. Ed’s teachings such as “accessing your ignorance” live on in u-lab’s worldwide ecosystem of change (captured through the visual artwork of O. Baldini, 2023)
(Source: u-school for Transformation¹).

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¹ <https://www.u-school.org/>