



# Vita Contemplativa

## The Christmas Gift: A Story of Dialectics

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### Abstract

In this paper I discuss some of the dualities, tensions, and dialectical processes that have been central to my intellectual development, as well as how they have shaped and continue to shape my scholarly contributions. I focus, in particular, on dualities and tensions between my academic and my religious life and between theory and practice. Both sets of tensions play crucial roles in my formulations of organizational change and transformation and in the insider/outsider joint research methodology I have helped to develop. These dualities and tensions were once reconciled in a Christmas gift whose ramifications have unfolded throughout my scholarly career.

**Keywords:** dialectical processes, theory and practice, organizational change, research methodologies

I've loved Christmas ever since I was a little girl. I love everything about it: the anticipation, the decorations, the music, the presents, the surprises, the Christmas tree, the connections with friends, the excesses, the generosity of so many people, and what Christmas symbolizes from my religious tradition. I count myself very lucky that the central defining theme of my intellectual life arrived as an unexpected Christmas gift on 25 December 1976. I want to describe this gift, what preceded it, and what it has continued to give me over the past 30 years. I will also suggest some of what it has given others in the form of my intellectual contributions.

Both the prelude and the aftermath of the gift include dualities, tensions, and dialectical processes (Seo et al. 2004). There are also, occasionally, confirming discoveries. I have come to see the story of this Christmas gift as a story of dialectics. There are many dualities and tensions in my life, including between my academic and my religious life, between theory and practice, between tacit and explicit knowledge, between control and feeling controlled. While the focus of this reflection will be primarily on dualities concerning my academic and religious life, and between theory and practice, I know that other tensions are also operative in affecting my work.

In this paper, I'll introduce some of the dualities I experienced prior to the Christmas gift, how I understand them unfolding at various times after it, and how they have influenced my academic contributions. I will also describe a particularly important confirming discovery.

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## The Prelude

I grew up in the suburbs of Cleveland, Ohio. On my first day of kindergarten at Lomond School in Shaker Heights, Ohio, when I was four years old, I decided I wanted to be a teacher. On my first day of first grade, at Gesu School in University Heights, Ohio, when I was five years old, I decided I wanted to be a Catholic sister, or nun. I am both of those, though certainly not in ways I ever would have expected when I was four or five years old. I'm a professor in the Organization Studies department at Boston College ([www.bc.edu](http://www.bc.edu)), and a member of the Religious of the Sacred Heart, an international Roman Catholic women's religious order ([www.rscjinternational.org](http://www.rscjinternational.org)). There were times growing up when I wasn't sure about one or the other choice, but on the whole, in evolving ways, both of them are part of the fiber of my being.

These two decisions, coming somewhat in tandem, have contributed to a central dialectic — between my academic life and my religious life — and have strongly influenced my intellectual contributions. I will give just two examples of how and when they intersected when I was younger. The first describes what happened when I told my parents that I wanted to become a Catholic sister and the second describes some events that affected how, after I joined my religious order, I understood why I had done so.

## Two examples of Academic/Religious Dualities and Tensions

### Graduate School vs. Becoming a Sister

Though I knew I wanted to get a doctorate in social psychology sometime, I decided that I would join my religious order (also referred to as joining the convent) the fall after I graduated from Maryville College (now Maryville University of St Louis) in 1966. However, I wanted to keep the fact that I was going to become a sister a secret. So, during my senior year in college, I applied to two doctoral programs in social psychology so that people would think that I would be going to graduate school after college. I carefully planned the time and the way that I would tell my parents of my decision to join the convent while I was home in the Cleveland area for an Easter break during my senior year in college.

On the afternoon of the day I'd planned to tell my parents, I was out of the house for a short time. While I was gone, Michael Driver, who was then a professor of social psychology at Purdue University, in Indiana, called me to tell me that I had been accepted at Purdue, and that he wanted me to be his research assistant. My mother answered the phone and, because I wasn't there, he told her of the decision. She called my father, who was very excited that I had been accepted at Purdue. When I got home, I had to deal with this unexpected event, and when I told my parents I wanted to be a sister they disagreed about what I should do the next year. My mother thought I should join the convent and my father thought I should get a doctorate. I eventually called a superior in the Religious of the Sacred Heart and asked her for advice. She suggested that I become a sister after college and get a PhD later, and that's what I did.<sup>1</sup>

**High School, College, the Convent, and Skinnerian Behaviorism**

I had had great ambivalence about where I wanted to go to high school and college. However, in both instances, I had inadvertently and unintentionally communicated to my mother — who then told my father — that I wanted to go to a high school (Academy of the Sacred Heart, Cincinnati) and, later, a college (Maryville) that were run by the Religious of the Sacred Heart. In both cases, my parents had agreed that I could go to the school that I had, they believed, chosen, and then told me of the efforts they were making so I could go there.

However, my desire to go to the high school and college were much less certain than my parents had thought, and in both cases I felt as if my parents had *really* made the decision for me and I didn't have a choice in it. One of the effects of the combination of the decisions was that, by the time I was in college, I didn't believe I had any free choice; what appeared to be my decisions really weren't. Thus, when I discovered Skinnerian behaviorism as a psychology (as well as sociology) major in college, I became a true believer almost immediately. I took an extra elective course in the experimental analysis of behavior, conditioned my own rat, and was convinced that we were all totally conditioned. The discovery of behaviorism also decreased the closeness I'd felt to God when I was a little child; I now felt manipulated by God. This was consistent for me with the message of some of the Christian scriptures (e.g. John 15: 16: 'It was not you who chose me, but I who chose you,' and Romans 9: 20–21: 'Who indeed are you, a human being, to talk back to God? Will what is made say to its maker, "Why have you created me so?" Or does not the potter have a right over the clay?').

Thus, by the time I joined the convent I didn't believe that I had any choice about being there. I went around telling the other people who had become sisters with me that none of us had any choice about being there. Not having had the benefit of my training in Skinnerian principles, they disagreed quite vehemently with me.

In Roman Catholic religious orders, there is typically a period, called a noviceship, during which the person gets experience living the life of a sister. It usually lasts between two and three years, and it is followed by temporary vows (usually of poverty, chastity, and obedience). The temporary vows represent the first formal commitment within the religious order.

It is necessary for a candidate for temporary vows to request to make them. When it was time for me to make this request, I felt totally stuck. There was no such thing as free choice, so how could I *choose* to request that I make temporary vows? And besides, I didn't like God very much; I felt that God had chosen me and I'd *had* to join my order.

I spent an agonizing time trying to figure out what to do. I finally, with help, reached a conclusion that I had the capacity to decide to make temporary vows. I still didn't like God very much. However, I reasoned, temporary vows weren't final. All I was committing to was taking the next steps in figuring out what to do. So, okay, I could make temporary vows. When I reached that decision I didn't have any sense of a deeper connection with God. My primary experience was that this was the first chink in the Skinnerian armor; there was at least a slim possibility that people might be able, occasionally, to make a choice that was not totally controlled.

Over the course of several years, the Skinnerian ideology eventually faded away into irrelevance. However, both of these examples illustrate tensions related to academic and religious choices and interpretations.

### **My First Job: An Experience that Affected Later Theorizing**

Making temporary vows meant that I went to my first full-time job, teaching at a school run by my religious order in the Chicago area in 1969. In August of 1969, just prior to the school year, our faculty participated in a several-day organization development (OD) intervention. The aim was to foster enhanced faculty participation in decision-making, using consensus methods, and to lessen hierarchical structures in the school. We also participated in short OD sessions in the fall and a day-long workshop in January.

The OD intervention had a very strong and negative ‘imprinting’ effect on me. To make a long and complicated story short, its focus on more equal participation led a male faculty member to believe that if he acted in ways that were somewhat inappropriate with female students (which he did), the principal did not have the authority or legitimacy to unilaterally stop him. When the principal found out what he was doing, she ordered him to stop and threatened to fire him if he didn’t change his behavior immediately.

Shortly after this happened, at the beginning of the day-long OD workshop in January this teacher and two of his friends stood up and dramatically announced that they were resigning, because of the lack of a collaborative climate in the school. However, they would consider an invitation to return to the school if it was made. Despite the fact that only the principal knew what the teacher had done, and for reasons of confidentiality was not telling the other faculty members, the OD consultants led the faculty in spending the entire day consulting with the principal on whether to invite the three people back. ‘We’ eventually decided not to invite them back. The meeting left a bad taste in the mouth of just about everyone there. After the meeting, there were no more OD consultants and no talk of, or wish for, participation in decision-making by anybody at the school.

The following summer, I helped run a summer camp for inner-city and suburban children in the Cleveland area. The camp counselors included both inner-city and suburban high school students. To assist their working together, OD consultants were called in to conduct introductory workshops. The workshops were so successful in getting the urban and suburban camp counselors to bond with each other that they often decided they were more interested in spending time with each other than in working with the youngsters attending the camp. They sometimes left all of the campers involved in a game like kickball while they spent time together.

The combination of outcomes was quite strange to me. In my first experience, the OD intervention clearly hadn’t worked. In my second experience, the OD intervention had succeeded so well that it had interfered with the camp counselors doing the work they were supposed to. I was left with thinking that this stuff is really powerful, but there must be *some* way for it to work better. My aspiration at the time was to become a consultant, and a much better one than those I had encountered.

## Graduate School

After teaching for two years, I applied to some psychology graduate programs in Chicago, and was accepted into the psychology department at the University of Illinois at Chicago (UIC). That doctoral program was fairly new, and had recently been redesigned in an innovative way, as a matrix. Every student was in one content area, personality, social, developmental, learning, physiological, or quantitative methods. Students were also in one of three application areas: academic (focusing on college teaching), clinical, or organizational. For someone whose life was (knowingly or unknowingly) a dialectic, this was ideal.

I had never heard of organizational psychology, and didn't initially connect it with OD. Moreover, I had already been a teacher. So I decided to be in the clinical program as a supplement to social psychology. However, during the summer before I started graduate work, I started to realize that people who went into clinical psychology were expected to become clinical psychologists, and I wasn't sure I wanted to be one. One day that summer, I encountered a 90-year-old member of my order, Sister Elizabeth Clinch. She asked me what I was going to be doing, and I told her I was going to go to graduate school in psychology. She immediately said, 'Don't go into clinical psychology; you're too impatient.' This comment was enough to get me out of any possible clinical leanings, and, after looking up the organizational courses, I decided to go into that. (The organizational curriculum included three subspecialties: industry, education, and community psychology. Because of my past experience and my lack of skill in foretelling the future, I chose education as my subspecialty.)

Some of the faculty in my doctoral program were studying intergroup bargaining, and I found myself drawn to that, in part as an intersection of social and organizational psychology and in part because of an experience I had during the summer after my first year in the program. In 1972 I was an evaluator for an outreach effort by the YMCA during the Republican National Convention that took place in Miami Beach. The YMCA was trying to mediate between police and protestors and between convention delegates and protestors. This was a very exciting project to be on the fringes of as an assessor (even though the assessment we were doing, keeping records of mediation attempts, was clearly not 'real' research according to the training I was getting in experimental design), and I decided to do my master's thesis on third-party intervention in intergroup bargaining. Of course I used a controlled laboratory experiment for my master's thesis (Bartunek et al. 1975). Although I appreciated them abstractly, I thought that the repetition necessarily involved in laboratory experiments was very boring, and not much of a motivator for a research career.

In addition to my coursework, I also did some consulting and training, especially after Chris Keys, who would eventually become my dissertation chair, was hired at UIC. He and a colleague, Ron Martell, involved some doctoral students in conducting interpersonal relations training for bailiffs and civil process servers in Cook County, as well as consulting for some other parts of the Cook County criminal justice system and various social services and mental health organizations. The more training of this type I did, the less I was enthralled by it, and the less I wanted to be a consultant, at least full time. However, as I look back now, I see that something important happened to me during that training.

We used a book by Schmuck, Runkel, Derr, and Martell (1972) entitled the *Handbook of Organization Development Training in Schools*. This book included multiple OD exercises, including training in communication skills. One such skill was 'perception checking', a way of checking with another person to be sure one understood the other's feelings. Schmuck et al. (1972: 40) stated that: 'The description should tentatively identify the other's feelings without expressing approval or disapproval of the feelings and without attempting to interpret or explain the causes of the feelings.' Another was 'describing own feelings', which aimed at helping others understand how a person felt so the others could respond with greater efficacy. Yet another skill was 'describing behavior'. In a behavior description, Schmuck et al. (1972: 41) said, 'You should report specific observable behaviors of the other without evaluating them and without making inferences about the other person's motives, attitudes, and personality.'

We did several exercises with the deputy sheriffs aimed at fostering these skills. As we did these exercises week after week, I now realize that the skills were growing in me. There was no conceptual basis for them, but I definitely received practice in developing and valuing them.

Chris and Ron received a contract to assess the effectiveness of an organization development intervention in the Archdiocese of Chicago school system, and I worked with them as a research assistant during part of the assessment. Much of their evaluation was through questionnaires distributed to schools participating in the intervention and control schools. This intervention was really interesting to me. I liked studying 'real' organizations more than creating artificial situations, though I still felt hesitant doing research that wasn't controlled laboratory experiments.

At one point in my doctoral program, I did some consulting with another religious order. This religious order had bought into consensus decision-making so completely that their leaders were finding it impossible to make almost any decisions without consulting the membership. I found myself acting very autocratically, just so they would be able to make some decisions. I had by now learned about the conceptual bases supporting consensus decision-making. But this was ridiculous.

This consulting experience, and the questions that it evoked in me, led to my dissertation, a field experiment, which built on the OD work being done in the archdiocesan school system. I examined the effects of participation in the OD effort and characteristics of various decision scenarios, including their importance and the conflict they evoked, on desires to participate in decision-making. The dissertation was not very good. Because this kind of research approach wasn't the emphasis of our program, I hadn't had training developing questionnaires or the kinds of scenarios that I tested. However, the topic was important to me, and doing research like this was more interesting than running laboratory experiments. (I appreciate the possibilities for creativity inherent in laboratory experiments much more now than I did then.)

### **Looking for a Job**

During my last year in graduate school, I wasn't sure what to do next. I interviewed for a job as an OD consultant for the Archdiocese of Chicago school

system, but was glad they didn't make me an offer. Eventually, I read Bolles's (1975) *What Color is Your Parachute?* That book helped me figure out that the fact that I enjoyed playing a guitar and leading the singing at Sunday masses suggested that I had the skills to teach in college. Also, I realized that although teaching the same short training session over and over again was boring, semester-long classes would give more leeway to develop ideas in detail. So, at the end of February of my last year in graduate school, I finally put a CV together and started applying for university jobs.

Not surprisingly, I didn't get any interviews from these late applications. So I signed up for the placement service at the Midwest Psychological Association meeting in May. I had several interviews there, including one of 15 minutes with Keith Murnighan. Keith was then an assistant professor in the Organizational Behavior (OB) group at the University of Illinois at Urbana-Champaign, and was looking for a visitor for the group. A week after Keith and I talked, the Chair of the department of business administration, Ken Uhl, called and invited me to be a visiting assistant professor in the OB group the following year. He told me that I could interview if I wished to, but that an interview was not necessary. I did decide to interview there, after a somewhat disastrous job interview at another university, where the fact that I was a sister was a huge problem for the psychology department faculty.

When I went to Urbana to interview, one of the first people I talked with was Greg Oldham. Greg asked me, 'What's this strange thing on your vita?' (referring to the line that said I was a member of the Religious of the Sacred Heart). I said 'It means that I'm a Catholic sister.' Greg said, simply, 'Great.' His response was a relief, and I was glad to go to Illinois, though I had never even walked through the door of a business school before. In addition, I wasn't sure if I liked research, but I figured I would give it a year to find out. I also had not resolved my relationship with God, and was not certain if I wanted to make my final vows.

### **University of Illinois, 1976–1977**

Mike Moch came to Illinois with a tenure track appointment the same year I came to visit. Shortly after both of us arrived, Mike and his wife went out of town for a few days, leaving their dog. They asked that I house-sit for the dog for a short time each day. While I was house-sitting, I took some time to reflect on my master's thesis and dissertation and to figure out if I had any coherent research interests. It had seemed to me that there were almost no similarities between the two studies. But when I had the time to reflect, I realized, to my surprise and encouragement, that there had actually been a fair amount in common between them. In both studies, I had explored the effects of a planned change intervention and, in both cases, I had studied something about conflict and how conflict was related to the intervention. How about that! I really did have some coherent research interests!

That year was profoundly important in my life. I had the great luck, when I arrived, to start working with Mike almost immediately on an assessment of a Quality of Work Life (QWL) intervention, one of the eight or so demonstration projects being carried out in the USA at the time (Camman et al. 1984). This was

an invigorating experience, a brand-new way of doing research, in which I learned from Mike how to construct questionnaire scales, to conduct interviews, and to observe. More importantly, I was finally convinced that these were all legitimate research tools.

In conjunction with this work, during the fall I read Argyris and Schön's (1974) book *Theory in Practice*. I found it very exciting, in part because this book provided a conceptual framework underlying the kind of training I had done in graduate school for the deputy sheriffs. This conceptual framework helped me understand that the communication exercises I had done had much more intellectual substance than I had recognized at the time. In other words, it provided a type of theory for my practice.

The OB group at Illinois would be hiring for a full-time position for the following year. Now convinced that I would like research, although concerned that my religious order did not have a community in Urbana, I applied for a position in the department, along with several other positions. As part of the application process, Ken Rowland, who was head of the OB group, asked me, in early December, to write out a list of my research interests.

Contrary to my experience when I was asked to choose whether I wanted to make temporary vows, and as an indication of how much freer I was in 1976 than I had been in 1968, being asked this question was a very liberating process for me. It felt as if, for the first time (though it clearly wasn't the first time) someone was asking me what *I* wanted to do, what *my* research interests were. I had the ability to choose and I was excited about it.

I now knew, through my experience at Mike's house, that I was interested in planned organizational change and conflict. I was also excited by the possibilities of thinking about theory and practice together, something that planned organizational change efforts, as Argyris and Schön's work indicated, illustrated very well.

### **The Christmas Gift**

My mother had died in 1975, and rather than going to the Cleveland area for Christmas in 1975 and 1976, my father and I went to Kansas City to visit my brother Bob, who lives there. On Christmas morning of 1976 I was praying about the scripture readings from one of the masses of Christmas. Specifically, I was praying about the prologue of John's gospel in the Christian scriptures (John 1: 1–18). The prologue starts with, 'In the beginning was the Word, and the Word was with God, and the Word was God.'

'In the beginning' the Word (God) is very abstract and distant, always described in the third person. But later the prologue goes on to say, 'The Word became flesh and dwelt among us.' By this point the reading is using the first person and much more immediate language, and I suddenly had a eureka moment. The *Word* became *flesh*. There was a theory–practice link. The 'word' was no longer just abstract, distant words. They became flesh; they were enacted, became part of 'us'. There didn't have to be a separation between theory and practice even 'divinely'; they could be part of each other in some way,

and my academic life could be integrated with my religious life.<sup>2</sup> This was what I wanted!

I got tremendously excited, and also felt: Now I can make my final vows (and I did, in 1978). Wow! First, I told my superior in my religious order, and then I told Mike Moch.

I will describe the unfolding of the gift, and how it relates to my intellectual contributions, as reflected in the research and writing I have done, below. I want to note, though, that some of what I will discuss has become clearer to me over the years than it was at the time, and that my relationship with God has not always been smooth and positive ever since; I still get angry at God sometimes. But I am learning to trust that, in practice, there is a strong relationship, and that the ways I interpret the relationship (my schemata about it) are meaningful in themselves. In other words, my relationship with God, like other parts of my life, holds dualistic and dialectic qualities.

In addition, although I have never consciously made decisions about what work to undertake based on that Christmas morning insight, I have often discovered that what draws me has been some embodiment of it. I am not a theologian, and I am under no illusions that my experience adds anything to theological interpretations. But much of my intellectual life since then has felt as if it touches parts of ‘the Word made flesh’ in ways that help to keep that experience alive for me.

## **The Unfolding of the Gift**

In 1976 the image of the ‘Word become flesh’ meant planned organizational change, especially OD, to me. Kurt Lewin (1951: 169) had said there was ‘nothing more practical than a good theory’, and his work was finding direct expression in OD. The Argyris and Schön (1974) book was about OD, and QWL interventions were variations on OD.

Although I didn’t want to do much consulting, I was certainly interested in attempts to link planned organizational change activities with the theoretical understandings out of which they came. For example, the QWL initiatives were conceptually based, and assessment of them aimed at contributing to theory.

I continued involvement in the QWL assessment when I came to Boston College (BC) in 1977 in a tenure track position. I also worked with Chris Keys on writing some papers assessing outcomes of the OD project in the archdiocesan schools in Chicago (Bartunek and Keys 1982; Keys and Bartunek 1979), and found that I enjoyed doing these kinds of research. I have been very fortunate that BC has supported the type of theorizing and practice-linked research I have done over the past decades.

## **Second-order Change Studies at Boston College**

### **Restructuring in My Religious Order**

In 1979 the religious superiors (called provincials) who were in charge of the five provinces (governmental units) in the US branch of my religious order decided

to merge the provinces into one. The possibility of merging the provinces had been discussed at 'higher' levels for about ten years. Because of my academic field, the provincials asked me to consult with them about mechanisms to facilitate the merger of the provinces. I worked with them for some time, with the agreement that I would also do scholarly writing about the change.

As I did this consulting, I reflected on conflicts that had been taking place in my order since the late 1960s, between those teaching in schools sponsored by my order and those doing work outside the schools that was specifically related to civil rights and social justice. Each 'group' was trying to convince the other of the value of its own work. I was curious about how and why the decision had been made to merge the provinces and whether it might be related to some of the conflict in my order, so I started reading some newsletters of my order that explained what had led up to the decision to merge the provinces.

Chris Keys invited me to make a presentation at a community psychology conference he was organizing. I was having difficulty thinking of a talk topic, and finally decided that my only hope was to take some of the newsletter materials I'd been reading and to devise some way of analyzing the decision to merge the provinces. The analysis was sketchy, and so was the description of what had happened, being based only on summaries in the newsletter articles. However, the people attending my talk seemed interested in it, and I became more and more interested in it as well, though this kind of research represented a departure for me. I had implicitly equated organizational change with *planned* organizational change, especially OD. This change was primarily emergent. In addition, it was a structural change, something I had never thought about, let alone studied, before.

Shortly after the community psychology conference, I discovered a filing cabinet that included materials from all of the provincials' meetings that had taken place in the 10 years that had preceded the decision to merge the provinces. This was a large archival data set that enabled me to trace, over time, much of what had happened that had led to the decision to merge the provinces. I had never worked with data like this before, and had to learn how. Thus, in many ways, studying this change was a major shift for me that required a reframing of my ideas both of what 'counted' as organizational change and how to study it.

The paper I eventually wrote about the decision to merge the provinces (Bartunek 1984) described cognitive processes associated with structural change and how dialectic processes helped lead to the change. These dialectic processes were sparked by the opposing perspectives on what work my order should be doing. The ability of the provincials to value the legitimacy of the different perspectives, thus enabling these perspectives to inform each other in a way that led to transcendence of them (cf. Seo et al. 2004), enabled accomplishment of second-order change. In contrast to first-order change, which refers to incremental modifications that make sense within already established interpretive schemes or schemata, second-order change refers to qualitatively discontinuous shifts in the interpretive schemes, or schemata, that organization members use to understand underlying dimensions of their organization (Bartunek 1984, 1993a).

Although my life experience had included dialectics for decades, this was the first time I recognized dialectical processes in action and how they affected

organizational change. I don't know how my awareness of the dialectic processes involved in the restructuring decision emerged, though I remember that recognition of their role suddenly occurred to me one day while my brother Tom was driving me someplace. The importance of cognitive and dialectical processes in the unfolding of second-order change, and the role that leaders have in fostering or impeding such change, has become a central intellectual theme for my work.

#### **Continuation of the QWL Study**

The QWL study built on my study of my religious order. The work I co-authored with Mike Moch about it (he wrote additional papers himself) and much of the theorizing we did (Bartunek and Moch 1987; Moch and Bartunek 1990) didn't take place until after 1984.

In our writing, Mike and I tested and expanded some of the ideas developed in Bartunek (1984). For example, we described how multiple conflicting interpretive schemes might be present in a change attempt, and how consultants could act in ways that interfere with the ability to create second-order change because they don't 'see' what's going on from a cognitive perspective.

The focus of the QWL intervention was on collaboration between labor and management, defined by those who developed the QWL demonstration projects as respect between labor and management and their working together to address shared problems. The consultants we studied implicitly assumed that everyone participating in the effort viewed collaboration in similar ways. However, we became aware that there were multiple ways that collaboration was viewed, and most of them differed considerably from the consultants' ways. For example, line employees saw collaboration as meaning that they got to ask for things and plant managers had to grant their wishes, while top management in the company thought that it meant more productivity.

The QWL program was ultimately unsuccessful, and we attributed the lack of success, in part, to the fact that the consultants were not conscious of, or able, to understand and 'hold' the conflicting perspectives that were present. In terms that Seo et al (2004) would use later, the consultants 'selected' their own meaning of collaboration, privileging it over the others present, rather than recognizing and accepting the possible legitimacy of the intervention's many meanings.

Mike and I were studying the QWL intervention during the time I formally applied to my religious order for permission to make my final vows. One night during that study, I was at the plant all night administering questionnaires to employees who worked on the third shift. The next morning, I received a call from my religious superior telling me that I had received permission to make my final vows.

There is a saint in my order named Philippine Duchesne (Mooney 1990), who had developed a reputation as someone who could pray all night. While I certainly hadn't been praying all night while I was distributing questionnaires, it felt fitting that I had gotten the call after I had spent the night involved in the QWL study.

#### **The Contributions of this Work**

The work I did studying the structure change in my order and then working with Mike to study the QWL intervention has made several contributions. Prior to this

work, many studies of planned change, such as OD and its variants, were treated in separate categories from other studies that (explicitly or not) involved organizational change. These studies (such as Keys and Bartunek 1979) typically assessed only whether a planned change 'worked'. The studies of my order and of the QWL project have helped to link studies of planned change with larger bodies of scholarship. They have done this through exploring change agents' and change recipients' interpretive schemes and schemata relevant to change, indicating ways that different groups of participants often (unknowingly) operate out of differing schemata, and showing that the type of change that might result from these combinations of schemata might be first-order or second-order.

My research has also shown that the process through which second-order change occurs is dialectical, in which the different types of schemata present constantly affect each other. The outcome of the change process depends, in part, on what form the dialectic takes, whether it is separation, selection, or, perhaps, transcendence (Bartunek 1993a, Seo et al. 2004). This form is, in turn, determined by how skilled leaders of a change initiative are in enabling multiple perspectives to be present. This approach has found empirical support in other investigations of organizational change (e.g. Balogun and Johnson 2004; Labianca et al. 2000).

Mike and I (Bartunek and Moch 1987, 1994) also discussed third-order change, although we have not developed this concept in detail. Briefly, third-order change refers to changes that lead organization members to become aware of benefits and limitations of their shared schemata, recognize how these other schemata limit as well as guide understanding, and become more effective at evaluating and changing their schemata.

### **A Shift in Focus**

I planned to continue doing studies that explored dimensions of the conceptual model I had constructed. However, the next study I did caused me to rethink not only what I study, but also the ways I conduct research.

### **Coordination vs. Autonomy in a School**

I wanted to test the emerging understanding of the importance of multiple perspectives and how leaders held them in another organizational intervention. I was able to gain access to a private school for a study I hoped would explore this.

The type of change the principal of the school envisioned was towards coordination among units rather than autonomy between them. Coordination was to be accomplished through the creation of a new academic director position that replaced a previously established curriculum coordinator role.

The school had had difficulty for the previous 15 years with the curriculum coordinator position and with coordination in general. Turnover in the position had been high, and the people who held the role felt they had not succeeded. They attributed their lack of success to a pervasive sense in the school that the various academic units were autonomous. The principal designed the new position so the academic director would have much more control over coordination efforts than

the curriculum coordinators had had. Thus, I saw what was going on as, in part, involving conflict between two perspectives: autonomy and coordination.

To conduct the study, I administered questionnaires at the beginning and end of the school year. I also visited the school and conducted interviews every two to three weeks over the course of the school year. I talked with the principal and academic director each time I went to the school, and I talked with different school personnel occasionally. By standard academic criteria, this was a well-designed study. It led to multiple journal articles and helped lead to an edited book and to additional book chapters (Bartunek 1993b; Bartunek and Reid 1992; Kolb and Bartunek 1992; Stevenson and Bartunek 1996; Stevenson et al. 2003).

Over the course of the school year, the academic director felt progressively less support from the principal than she had expected. So she turned to others, telling several administrators and faculty members about problems she was having. Some of these people complained to the principal that the principal wasn't supporting the academic director well enough. Such events led to increasing conflict between the principal and academic director.

At the end the school year, there was a pervasive sense among top administrators that, in the words one of them used, 'nothing had changed' concerning coordination in the school'. The academic director felt isolated and ineffectual, and the administrators felt that the implementation of the position had not accomplished its aims.

#### **Problems with the Study**

I wanted to continue the study the next school year, and I requested permission from the principal to do this. However, she said no. At the beginning of the study, I had clearly said (and gotten agreement) that I would be writing about the events, and the principal had been enthusiastic about that. However, it emerged that the reason she had been enthusiastic was that she had assumed that the new position would be a success, and she wanted the success documented. Why would I want to write about a failure? In addition, she told me that my ongoing interviewing of the academic director had caused the academic director to be too self-centered, and that had been one of the reasons for the problems she had had in her position. I was upset about this, and tried to convince the principal, without success, that I should be allowed to return to continue the study.

During the religious retreat I had made prior to my final vows, I had not been able to pray with the scriptures. Instead, my dreams had become a source of my praying. The use of dreams as an integral element of my praying has continued and has played a role in several important experiences I have had, including one associated with this study.

In October of the year following data collection in the school, several months after the film *The Mission*, about Jesuit priests in Paraguay in the mid-18th century, had been popular, I dreamed that one night I'd driven to the city where the school I was studying was located and looked for a place to park near the school. I wanted to talk with the school principal about returning. In the dream, I was having trouble finding a parking place and was feeling lost. But when looking for a place to park, I saw near the school a large, brightly lit, neon sign that proclaimed 'THE MISSION'.

In working with the dream, I gleaned that 1) I really wanted to return to the school to continue my research, 2) I felt a bit lost about my 'mission', and 3) I was seeing what I was doing as part of my religious, as well as part of my academic, experience. I told the principal about the dream and asked again about the possibility of returning, but she definitively said 'no'.

When she said 'no' again, I did feel lost. While academically I felt good about the study, personally I felt badly about it; I didn't like it that I had been kicked out of the school.

### **The Emergence of Insider/Outsider Team Research**

A short time later, I had dinner one night with Catherine Lacey, a friend who was beginning her dissertation at the Harvard Graduate School of Education. Catherine told me about a group that she and Diane Wood, another friend of hers, were planning to start in the network of schools of which they had both been a part for several years. The group, to be called the Network Faculty Development Committee (NFDC), was aimed at fostering the empowerment and personal development of experienced teachers in the Network. Catherine was very enthusiastic about the group, and thought she would like to study what happened to it as her dissertation. However, the Harvard faculty rejected the possibility of someone studying something she was also creating. Catherine felt somewhat down about this, but I started to get an idea that would, possibly, enable the NFDC to be studied and would also respond to some of my own unease about my former experience. This idea would lead to a substantial shift in my understanding of how I wanted to work and what links between theory and practice, and to some extent my religious and academic 'mission', might mean.

I was familiar with work by Roger Evered and Meryl Louis (1981) that described how insiders to a setting and outside researchers typically inquired in different ways about the setting. It occurred to me that although Roger and Meryl had only focused on differences between insiders' and outsiders' modes of inquiry, it might make sense to combine both modes in a study. It might make sense, in other words, for insider members of a setting (such as Catherine and Diane) to collaborate with an outside researcher (such as me) to study what was going on in an organizational change effort.

I suggested this idea to Catherine, and passed on the Evered and Louis (1981) paper to her. Catherine suggested the idea to Diane, who eventually thought it might work if the NFDC members agreed to it. I checked with the members of the NFDC during their first meeting, and after some hesitation they agreed that they trusted me enough to have me sit in on the group as a non-participant observer and to take notes on what was said, with the idea that I would write about the group with Diane and Catherine. I ended up sitting in for seven years as a non-participant observer of the NFDC, outlasting both Diane (who left after the second year) and Catherine (who left after the sixth year).

During the time I studied the NFDC, I developed what joint insider/outsider (I/O) research might mean. Meryl and I wrote a paper (Louis and Bartunek 1992) and then one of the Sage qualitative methods books (Bartunek and Louis 1996), in which we sketched out primary defining characteristics of

insider/outsider research and explored how it has been implemented in several fields, including organizational behavior, education, and community psychology. We described it as a research method in which insiders to a setting and external researchers collaborate through a study to tell a scholarly story about the setting.

I conducted several studies of events in the NFDC with one or both founders, including a study of their original vision for the group (Bartunek et al. 1992), how the group addressed the alcohol problem of one of its members (Bartunek and Lacey 1998), how leadership transitions occurred in the group (Bartunek et al. 2000), and how understanding of the group's mission was transmitted to new group members (Meyer et al. 2002). Finally, I wrote a book about the NFDC (Bartunek 2003a) to which I invited everyone who had been a member of the NFDC to contribute. About half of the members did contribute. I have also conducted insider/outsider studies in settings outside the NFDC (Bartunek et al. 1996, 1999, 2006).

Doing research this way means that setting insiders have a chance to contribute their own insights and analysis, rather than have their story told only by external researchers. I am trying, in other words, to develop a way of doing research that legitimates multiple perspectives, somewhat like what I had seen the provincials in my order doing with regard to conflicts among members working in my order's schools and in justice work. This is meant to be a dialectical approach, in which multiple perspectives are respected and, in Seo et al.'s (2004) terms, connected, held simultaneously, rather than one selected over the other. For example, in the Bartunek (2003a) book, one or more members of the NFDC sometimes disagreed with how I analyzed particular events. Both perspectives were enabled to coexist.

Can members of a group contribute to their own study in a way that has scholarly validity? My experience is that insiders help to reveal practice dynamics in a setting and theorize about them that could not otherwise be done, but that are crucial for understanding fully what occurred in the setting.

### **Contributions of the Insider/Outsider Approach**

The I/O approach reflects a theory–practice link, in which an outsider particularly concerned about generalizable theory collaborates with one or more practitioners concerned about action in their own setting, to create knowledge. It differs from approaches in many branches of the social sciences that basically treat members of a setting as ‘informants’ who don't (or shouldn't) reflect on meanings they experience, and whose interpretations are generally discounted. Rather, it argues that insiders to a setting have meaningful, valuable, cognitions and schemata about their setting, and that, together with outside researchers, they can create knowledge that neither would be able to create by themselves. This approach also gives insiders a chance to participate in telling their scholarly story, and thus to convey the kinds of experiences and thinking that are most important from a practitioner perspective. The I/O approach has been used in a number of scholarly fields, including education, community psychology, medicine and nursing, and multiple areas of management.

### Ongoing Development of I/O Links

The development of an insider/outsider orientation continues to evolve in ways that lead me to expand my prior understandings. For example, Sara Rynes's invitation to me to work with her and Dick Daft on editing a special research forum on academic–practitioner knowledge sharing in the *Academy of Management Journal* (Rynes et al. 2001) increased my appreciation of differences in academic and practitioner inquiry and of ways academics and practitioners might share knowledge and learn from each other. In addition, I have become more conscious that the insider/outsider approach primarily invites practitioners to contribute on researchers' turf. For example, I invite practitioners to contribute within the framework of scholarly writing, but I do not, as a researcher, do as much that is related to their practice. I have started to become more conscious of ways that academics can learn from practitioners' behavior, not only their writing. This has come about, in part, because of my own practice as an officer and president (2001–2002) of the Academy of Management.

Recently, I have found myself drawn to exploring practitioner modes of inquiry that might inform academic thought. For example, I am co-authoring, with Jordi Trullen (in press), a chapter on the virtue of prudence — practical wisdom that, by definition, can only be applied in practice in times when there are no clear prescriptions for action.

### A Confirming Discovery

I said above that working with my dreams is important to me as part of my religious life. I often make major decisions in ways that build on work with my dreams.

When Mike Hitt (the past president of the Academy of Management) called me, in December of 1997, to invite me to run for the position that would lead to president of the Academy, it was obvious to me that my decision would need to be informed by a dream I would have. The dream I had and worked with gave me a sense that I should run for president. In addition, based on conversations with some friends who were skilled in working with dreams, I became aware of important imagery in the dream. I decided that if I were to win the election for president, my presidential speech would revolve around the dream I had had when I was asked to run for the position.

I will not recount the entire dream or the presidential speech here; both are available elsewhere (Bartunek 2003b). However, I want to reflect on one part of the dream and a surprise I encountered while preparing my Academy of Management presidential address.

In my dream, I was shopping for shoes in a shoe store on top of an apartment building. I hadn't expected that there would be any shoes that were my size, but to my surprise there were some, though they were ugly.

When I worked with the dream, the metaphor of 'the shoe fit' (even if it was ugly) had been evident and had supported my running for the position of president. But, later, I also become aware of a basic paradox in the image of shopping for shoes on top of an apartment building. As I eventually said in my presidential address:

'Shoes typically symbolize something quite earthy and grounded ... The top of a tall apartment building, way up in the stratosphere, in contrast, often refers to a kind of ethereal, spirit world. We usually do not go into the stratosphere for something in the real world. But this ethereal world was precisely where the earthy — the grounded — was to be found.' (Bartunek 2003b: 202)

In other words, we might go up into the ethereal theory world for support for the 'grounding' of practice. Theory and practice didn't have to be split, as they sometimes are.

While I had had help with making sense of the imagery in my dream, I hadn't known how to pull all the imagery together. A few months before I gave my presidential address, though, something happened that helped me gain insight into this.

A former MBA student of mine, Frank Schneider, had given a talk on 'managing organizational change' in an MBA class I was teaching. I had taught Frank in both the heavily practice/case-oriented MBA and heavily research and theory-oriented PhD level versions of a course on organizational change, and I think the fact that the insight I will describe occurred when I was with him is not a coincidence.

I took Frank out to dinner to thank him for giving the talk in my class, and told him a little about my upcoming presidential address. Sometime during the dinner a unifying theme for the dream, and especially for the imagery of shopping for shoes on top of an apartment building, suddenly leapt out at me. I suddenly saw that this dream could be understood in terms of the way I'd been praying on Christmas 1976, when I encountered not only a disembodied, ethereal, distant God but also one who had taken on flesh and blood and dwelt among us. The way I put it in the presidential address (Bartunek 2003b: 203) was, 'A shoe store on top of an apartment suggests that words that take on flesh, that are embodied, that walk, are more likely to be life giving than words that remain independent of what we actually do.'

This was, for me, a very exciting and integrating insight, one that linked my practice as Academy of Management president, and my attempt to express it in some conceptual fashion, with the central insight I had had as a religious about the Word made flesh. When I gave the speech, I felt as if I was having a chance to share my religious experience with the Academy of Management, even if only implicitly.

## Summary and Conclusion

My intellectual contributions are integrally bound up with my life practice, with ongoing tensions, dualities and dialectical processes that often have to do with theory and practice, with my academic and religious life. It has been this way since I was a small child, when my decisions to be a teacher and a sister were first made. When I write about dialectical practices (e.g. Seo et al. 2004), I don't do so as a purely academic exercise, but as something I regularly experience in myself that continually informs my academic contribution. My academic framework helps me make sense of my own life and my practice draws me into

respect for differing perspectives, both practitioner and academic. Moreover, it's clear to me that this experience, even when it is uncomfortable, and it often is, continues to foster my intellectual development.

I end this paper unfinished but in process, in both theory and practice, with confidence that this pattern will continue to evolve in ways I can't imagine yet. I end it trusting that I will be open to the evolution. I end it with certainty and gratitude that the evolution will involve both theory and practice and my academic and religious life.

## Notes

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- 1 Many readers of *Organization Studies* may not be very familiar what it means to be a Catholic sister. While there are considerable variations, Catholic sisters, especially in the religious order to which I belong, make three vows, of poverty, chastity and obedience, typically pray daily, make annual religious retreats of several days, seek spiritual direction, live in community, and treat work as, at least in part, a means of ministry.
- 2 Although I wasn't thinking theologically at the time, I believe that my experience was not inconsistent with a theological interpretation of John's prologue. O'Day (1998: 71) commented, for example, that the language of John's prologue 'makes clear that the evangelist positions himself and the readers of his gospel at this intersection of the timeless and the time-bound. Third person narrative slides into first person plural narration (lived among us, we have beheld, we have all received).'

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