

“A perspective informed by Bowen theory also allows organization development consultants to engage with client systems without being caught up in the client emotional process—a stance that can help reduce anxiety throughout the system.”

Applying Bowen Theory to Work Systems

By Katherine Kott

We live in anxious times. Technology is driving change at an unprecedented rate in the workplace. Downsizing creates an anxious environment for members who remain employed as relationship systems and social networks are disrupted (Mayton, 2011, p. 42), generating symptoms that are challenging for leaders and organization development professionals to address. In recent years, organization development professionals like Mayton have discovered that Bowen theory can be an effective approach when engaged with anxious work systems. This paper is intended to introduce consultants to concepts from Bowen theory that can support the consultant's ability to better manage self in client engagements, help the consultant see the “emotional” forces at work in the client system, and enable the consultant to promote systemic change in the client organization.

Bowen theory is one of a group of family systems theories, some of which have been applied to organizations. What differentiates Bowen theory from other family systems approaches is its emphasis on the sensitivity human beings have to each other at a biological level. Bowen described this sensitivity as the “emotional system” (Bowen, 1978b, p. 376).

Applying Bowen theory to work systems has the potential to create transformative change as people become aware of hidden emotional processes in the system. Understanding these emotional processes through Bowen theory takes some of the mystery out of workplace behaviors that do not make logical sense. A perspective informed by Bowen theory also allows

organization development consultants to engage with client systems without being caught up in the client emotional process—a stance that can help reduce anxiety throughout the system.

Reducing workplace anxiety is not only important to employee health and wellbeing, but to organizational effectiveness. Neuroscience research suggests that cognitive impairment may result from stress related to consistently high levels of anxiety (McEwen, 2002). At the group level, ability to solve problems and think creatively may be reduced as a result. Decreased capacity for innovation can have serious negative consequences in today's competitive business environment.

More than a decade ago, I learned about applying Bowen theory to work systems through a series of Working Systems Forums offered by Kathleen Wiseman. Wiseman promised to introduce participants to “a different way of thinking about workplace dilemmas, a new understanding of how business relationship systems work... drawn from a Bowen Systems Theory perspective” (Working Systems, Working Systems Forum, nd, ¶ 3).

Wiseman's workshop changed the way I approached my work, first as a manager and leader, and later as a consultant. Bowen theory focuses on managing self, being clear about one's own beliefs and values, and avoiding reactivity while remaining responsive. As I incorporated Bowen theory principles such as defining self and staying outside the work system emotional process into my work, coworkers and clients noted my calm presence and

Table 1. *Comparison of Use of Self and Bowen Theory*

Use of Self Theory	Bowen Theory
Focus on individual agency	Focus on understanding and managing self in emotional system
Developmental focus—automatic is “child-like”	Natural systems focus—automatic is a function of the “primitive brain” (Miller, 2008, p.40)
Developmental focus—thoughtful is mature	Natural systems focus—thoughtful is ability to engage the cerebral cortex
Emphasis on influence	Less invested in specific outcomes—responsibility rests with client, especially leaders
Societal inheritance	Biological inheritance

my ability to contribute to the work system as an impartial facilitator, creating space for employees and clients to solve their own problems.

Managing self has elements in common with use-of-self theory (Patwell & Seashore, 2006), including an emphasis on being more thoughtful and less automatic when responding to others. However, there are also important differences between the two, as shown in *Table 1*.

While both theories emphasize the ability of the individual to make choices about behavior, the theories differ in what they claim the individual must overcome to respond thoughtfully. In explaining use-of-self, Patwell and Seashore asserted that acting out of unawareness comes from “societal inheritance” (p. 31). On the other hand, Bowen explained the ability to make choices in biological terms. A human “does have one ability beyond *other* protoplasmic life, and that is [the] ability to observe, think, abstract, and see the natural order, to understand the secrets of nature and govern himself a bit differently” (Bowen, 1978a, p. 422).

To tap the ability to make choices within a use-of-self framework, the individual makes an effort to become more mature. Within a Bowen theory framework, individuals make an effort to reduce automatic reflexes by learning to observe their sensitivity to others and by making an effort to remain neutral and calm to reduce anxiety in the system (Bowen, 1978a, p. 422).

Introducing a calm and neutral presence in the work system helps others to

calm down themselves and become more capable of solving their own problems (Segal, 1997, p. 350). As I used my knowledge of Bowen theory, my subordinates became less dependent on me as a manager and my clients were able to implement and sustain changes I had introduced as a consultant or that they had come up with themselves, once they were better able to solve their own problems.

For example, during my career as a manager, two quite capable unit heads reported to me. Each of them did a good job managing her work group and had the respect of her employees. However, the two of them did not get along. They had very different personal styles, and both thought the other should change. Each of them came to me to complain about the other.

Before learning about Bowen theory, I would have taken responsibility for the problem and tried to fix it through communications workshops or other techniques. After learning about Bowen theory, I expected the employees to resolve the problem themselves. I let each one of them know I was relying on them and that I expected them to figure out how they were going to work together and to let me know their plan. Within a couple of weeks, they were able to resolve their differences.

I was eager to share the knowledge I had gained through the Working Systems Forum and further study of Bowen theory at the Bowen Center and its regional affiliates.¹ However, I wanted to gather data

1. <https://www.thebowncenter.org/pages/outsideprograms.html>

beyond my personal story. As I launched my dissertation research for the PhD program at Fielding Graduate University in 2011, I decided to examine how organization development consultants apply Bowen theory in their practices. My goal was to make Bowen theory more accessible to organization development professionals. As I studied the work of organization development professionals who use Bowen theory, a number of patterns emerged. I described these patterns in a reference model for using Bowen theory in organizational work (Kott, 2012).

By extracting the model from the dissertation and publishing it here, I hope to disseminate the model more widely. This article focuses on the application of Bowen theory to organization development practice—the how-to. I have included enough about Bowen theory to put the model in context, but have not provided details about the theory or the methodology I used to create the model. To learn more about Bowen theory and the model development process, readers may wish to consult the full dissertation, which is openly available on the web (Kott, 2012).

Bowen Theory: A Gentle Introduction

Murray Bowen, who played a key role in the family therapy movement in the mid-twentieth century, was a psychiatrist and family therapist. Bowen focused on developing his own theory of human behavior with a natural systems foundation. Bowen read widely in ethology, evolutionary biology, and neuroscience and incorporated concepts from those fields into his theory. His theory focused on the family rather than the individual as the unit of study and he believed the concepts he developed would be extensible to work systems (Bowen, 1978c, p. 462). His belief about the extensibility of his theory to work systems has been upheld through the practices of some organization development consultants, including the participants in my dissertation study.

Bowen developed eight interrelated concepts to describe human behavior; differentiation of self, the triangle, nuclear

Table 2. *Bowen Theory Concepts*

Concept	Definition
Differentiation of self	Ability for an individual to remain autonomous under group pressure
Triangle	Involvement of a third person to stabilize a relationship between two other people
Nuclear family emotional process	Other mechanisms used to manage intensity in relationships (e.g., conflict, disengagement)
Family projection	Projection of unresolved problems of the parents or leaders onto a child or organizational member (e.g., scapegoating or blaming)
Multigenerational transmission	Persistence of certain types of problems over time, despite leadership changes
Sibling position	The relationship of an individual's birth order, and number and sex of siblings on ability to function
Emotional cutoff	An individual's response to dealing with an anxious system by disconnecting from it
Emotional process in society	The idea that all the mechanisms at work in a family group are extensible to other types of groups and to society as a whole

family emotional process, family projection, multigenerational transmission, sibling position, emotional cutoff, and emotional process in society (Papero, 1990, pp. 45–64). These eight concepts are summarized in *Table 2*.

Bowen sometimes used common terms to mean slightly different things than they mean in ordinary usage. For example, Bowen used the term emotion to mean automatic responses to stimuli. In Bowen theory, an emotion is more like an instinct than a feeling. Anxiety is among the automatic responses Bowen described as “emotional.” Acute anxiety is a response to a threat that is real, such as a natural disaster or an accident—typically a fight or flight response that dies down once the danger has passed. On the other hand, chronic anxiety describes a prolonged period of arousal in response to future threats that might or might not actually occur (Comella, 1996, pp. 5-6). Bowen believed that just as animals signal each other when they detect a threat, humans

transmit “anxiety” to one another. A family system or a work system that expends energy on possible future threats is known as an anxious system (Miller, 2008).

Differentiation

The concept of differentiation of self is fundamental to Bowen theory. Differentiation describes the variation among people in their ability to remain autonomous when under pressure to join with others. Bowen described people who are able to think and act according to their own values and beliefs as well differentiated.

Triangles

Bowen thought that three-person groups or triangles were “the basic building block of any emotional system” (Bowen, 1978b, p. 373). This is because in a dyad, when there is enough anxiety or tension between the two people, one person typically involves a third person to make the situation more

comfortable or less intense. The process of involving a third person creates a more stable unit—a triangle. The organization development consultants in my dissertation study were on the lookout for situations where they might have been called in to calm intense relationships between two people in an organization, thereby being “triangled in” to the work system even before the engagement was launched. Without an awareness of triangles and how they transmit anxiety, an organization development consultant runs the risk of being caught in the organization’s emotional process, which can compromise the consultant’s ability to be objective and therefore work effectively with the client.

Nuclear Family Emotional Process

The nuclear family emotional process describes other mechanisms that are used for managing intensity in relationships such as conflict or disengagement. Translating this concept to work systems, consultants may see symptoms similar to those that therapists observe in families. Some of these symptoms may include isolation of work groups from each other (silos) and conflict.

Family Projection

Scapegoating or blaming can be seen as an organizational form of family projection in which problems the parents are unable to resolve are projected onto a child or children. The projection process in a work system occurs when leaders are unable to resolve their conflicts or other important organizational issues and project the problem onto employees.

Multigenerational Process

A culture of conflict or blame that persists despite leadership changes or other organizational change efforts may represent an organizational multigenerational process—persistence of a problem even when the leadership of an organization has changed.

Sibling Position

The sibling position concept, which Bowen adapted from Walter Toman's work (Toman, 1992), assumes that birth order as well as the number and sex of a person's siblings has an influence on the person's functioning. The consultants I studied seemed to deemphasize this concept, perhaps because many of them did not gather this type of demographic information about their clients.

Emotional Cutoff

Although Bowen focused on the system rather than the individual, the idea of emotional cutoff describes individual responses to emotional intensity. These responses include rebelliousness, physical distance, or emotional distance. Workplace symptoms might include acting out or insubordination, or a preference for working from home without mechanisms for other types of regular contact.

Emotional Process in Society

Bowen theorized that the concepts he developed through work with families were extensible to other groups including work groups and society as a whole (Bowen, 1978b, pp. 385-387). Just as a family's functioning can improve when family leaders (e.g., parents) make an effort to become better differentiated, an organization will function better if leaders work on differentiation of self. A well-differentiated leader is able to set a clear direction for the organization and to communicate expectations to others.

In Bowen's view, what distinguishes humans from other animals is the ability to overcome automatic emotional processes through cognitive effort. By increasing capacity for reflection, Bowen believed that people could become less reactive (Kerr & Bowen, 1988, p. 94). Much of Bowen's approach to therapy was based on this principle and organization development consultants who use Bowen theory base their interventions on this foundational concept.

Application of Bowen Theory to OD Practice

By gathering information from twelve practitioners who use Bowen theory in their work with organizations, I created a model for using Bowen theory in organization development. Experienced organization development consultants will see that the model incorporates fairly standard consulting steps. What differentiates this approach from others is the consultant's calm and neutral stance throughout the process, and the attention the consultants pay to emotional process.

Consultants who base their practices on Bowen theory strive to develop a coaching relationship with their clients, acting as a facilitator who encourages clients to solve their own problems rather than an expert or even a collaborator. In addition, the consultants build in time for reflection and course correction along the way. A Bowen theory-based approach may require more flexible contracting to enable the consultant to make adjustments to plans as they learn more about the emotional process at work in the organization.

The following section provides an explanation of the model, followed by a short case study to demonstrate the model in use. As shown in *Figure 1*, the

consultants apply concepts from Bowen theory at each step of the consulting process; entry and contracting, data gathering and analysis, intervention, and evaluating and closing the contract. The consultant's stance as a coach and neutral observer with a systems perspective provides a foundation throughout the process.

Enter and Contract

As a consultant and client prepare to work together it is important to evaluate whether or not the client is receptive to the consultant's approach. Most consultants who use Bowen theory believe it is important for the leader to be involved in the project, especially if the presenting problem involves members of the leadership team or if an individual in a high level position is identified as a problem person. Not all leaders are willing to commit to being involved themselves, usually because they cannot see that they may be playing a part in the problem due to their role in the emotional system. It is therefore important for the consultant to decide up front if they will work with the client without the leader's involvement.

Two of the participants in my study discussed cases when they thought the leader's involvement would be critical to

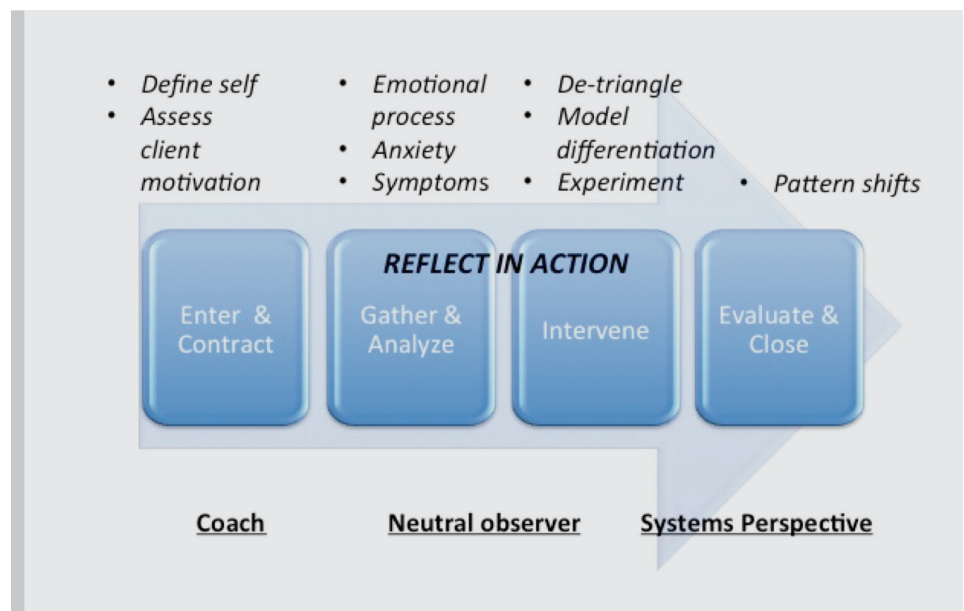


Figure 1. Process Flow for OD Consultants Using Bowen Theory

the success of the project. In both cases, the consultants told the leaders they would not accept the project without the leader's involvement because the consultants believed the leader was playing a part in the dynamic that was causing symptoms such as conflict between members of the management team. In one case, the leader agreed. In the second case, the leader refused to participate and the consultant did not accept the project.

Bowen theory suggests that change at a higher level of a hierarchical system will have more impact than change at lower levels. Consistent with this perspective, which Bowen developed by studying literature related to the behavior of other species, eleven of the twelve participants in my study prefer to engage with high-level leaders in their organizational work. When working at lower levels of the organization, it is important for the consultant to be realistic about what can be accomplished. While it may be possible to coach an individual at a lower level of the organization to better manage self in a difficult situation, it may be impossible for the consultant to effect significant systemic change by working solely with that individual.

The one participant who did work with individuals at lower levels of the organization described one case in which he was able to help an individual see the emotional process that was causing her to be perceived as a problem person in her organization. He was able to coach her so that she could change her own behavior and stay out of trouble. This fixed the problem for the organization in the short term, by addressing the behavior of a problem person.

However, the intervention did not address the longer term functioning of the work system or enable change at a deep level. The employee was unable to exert much influence on the overall system, but based on the coaching she received, she was able to stay out of the line of fire until she found a job in a less anxious organization. The consultant who had worked with her found the result of his intervention worthwhile because of the positive impact it had on the individual, even without the organizational transformation that might

have been possible had the leader been involved.

Gather and Analyze

To apply Bowen theory to a work system, it is important to look beyond the client's description of the presenting problem to the underlying emotional processes at work. Are there active triangles in the system? Is there conflict between leaders? Is one person being singled out as the problem person? These are all possible symptoms of an anxious system. By gathering information about the flow of anxiety in the work system, the consultant is often able to see underlying processes that may be invisible to the client.

To map the flow of anxiety in a work system, it is often helpful to draw an organization chart. On the chart, identify dyads where there is conflict. Think about and indicate on the chart where a member of a dyad involves a third person, creating a triangle. Are there other triangles at work in the system? By mapping out where triangles exist in the organization, the consultant can follow the flow of anxiety in the organization. Understanding the emotional processes at work in the system can enable the consultant to suggest more sustainable solutions to organizational problems than treating the symptom (e.g., firing the problem person) might provide.

Intervene

The primary focus of a Bowen theory-based intervention is to support motivated individuals in the client organization to become better differentiated—to act based on principles, not get caught up in group-think, be able to speak up, etc. In particular, if leaders are better able to act based on their beliefs (for example, set clear expectations) Bowen theory predicts that the emotional system will shift. The shift will lower anxiety and encourage all employees to be more responsible for self.

To provide this support to motivated individuals, consultants work to remain in touch with all parties without taking sides. They avoid as much as possible getting "caught up" in the client emotional system

and encourage clients to participate in creating their own solutions.

One of the dissertation study participants, Colleen coached high potential employees in an organization. She gathered information about expectations and performance from the high potential employees and their bosses. To stay out of the relationship between the boss and the subordinate, Colleen made it a practice to set up a three way meeting. She explained,

I'm doing that to cut down triangulation. Because I don't want to get/hear all the stuff from the boss and then they hear all the stuff separately from the boss and then two of us are talking and they're going, "Well, that's not what I heard," and I'm going, "Hmm, well I heard something different," and then all of a sudden I'm delivering the boss' message. I don't want to do that.

Colleen found she could be more effective in most situations by staying out of the relationship between the boss and the subordinate.

Approaching organizational problem solving with a research perspective can also offer a way to help people move away from entrenched positions and become more flexible. Another study participant, Rita described the way she handled a problem one of her clients had, feeling left out and ostracized from her work group. Rather than giving advice, Rita asked a number of questions, "What might be your understanding around that?" "What do you think might be useful to the system?" These questions engaged the client's thinking and enabled her to come up with a couple of experiments to see if she could shift the system by changing her part in the emotional process.

Evaluate and Close

To evaluate the success of a project, consultants who use Bowen theory look for signs that the way the work system functions has changed. Are symptoms of anxiety such as scapegoating and blaming less prevalent? Are people demonstrating higher levels of

differentiation by offering differences of opinion in a calm and reasoned manner? Are leaders happy with the performance of their employees?

Study participant George, had a hunch that leaders would find that employees were escalating fewer issues that they should have been handling themselves following an intervention based in Bowen theory. Although George has not yet made a formal study, his clients seem to think they are spending the bulk of their time on activities that are at the right level, they are letting people “off the hook” less frequently,

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and are less involved in refereeing difficulties between other people than they were before the intervention. From a Bowen theory perspective, these shifts would indicate that the system has become less anxious—people are less caught up in the emotional process. The result is an improved ability to think and solve problems.

Case Study

Study participant Rita provided an example of how she applied Bowen theory when she was contacted to help a leader in an academic library resolve conflict between members of his leadership team. First, Rita discussed her expectation that the leader would be involved in the process. She would not come into the organization and fix the others without the leader’s participation.

In explaining the importance of setting the tone with the leader, Rita said, “it’s tricky because if someone is hiring you,

sometimes their expectation is that they’re also hiring that feeling of comfortable togetherness that says we’re on the same side of things.” The risk to the leader is that he or she might have to change. Sometimes, leaders have not considered the fact that they may be playing a part in the problem. In this particular case, the leader was open to participating, so Rita proceeded with the engagement.

Rita explained that before she learned about Bowen theory, she would have used a technique for team building such as administering a Myers-Briggs or Birkman

Method instrument with the leadership team. She would have used the results to encourage the team members to get along better. Instead, using an approach based on Bowen theory, Rita’s first step was to interview members of the team both individually and in a group setting to see what she could discover about the emotional process in the work system. What she discovered was that the organization was facing serious threats. Neither the top leader nor the members of the leadership team had engaged in figuring out what they were going to do about their situation. The conflict between the members of the leadership team was a symptom of the anxiety they had about these huge unresolved issues.

Rita predicted that if she could help the top leader and members of his team get as factual as possible about their situation, they would become less anxious. She thought if she could help them focus on problem solving (exert cognitive effort),

while they might not agree, they would be on a path to leading their organization through a difficult transition, including budget cuts and possible layoffs. Rita wanted to stay out of the relationship process between the members of the team who were in conflict. She wanted to encourage the leader, who she saw as having the potential to learn and change, to grapple with the serious issues they were facing. Rita said,

I started asking questions and getting the team focused on, “Where do you think this field is going in five years? What do you think it’s going to look like in terms of the services you provide—in terms of the way that you utilize your space? What’s going to happen in terms of the form in which data comes? What are going to be the expectations in terms of what the university is going to need from you? What’s going to be the impact on the staff and what’s going to be the impact on the skills that your staff will need to have?”

And it was interesting because as they began to focus on those things and we began to develop ways to talk about that and began to start thinking about it in a non-reactive way, interestingly enough a lot of the personality conflict began to really calm down.

As she evaluated the success of the engagement, Rita could see the kind of shift in the system Bowen theory would predict. She had stayed outside of the emotional process and identified anxiety in the system. By planning a different kind of intervention, she modeled differentiation and she experimented by asking the client questions. As they took responsibility for the difficult work they were facing, the conflict receded. The duration of the engagement did not give Rita an opportunity to evaluate whether or not the team was able to sustain the shift in their emotional process. However, the intervention she used did allow them to experience a different way of working together when they took responsibility as leaders for the issues facing their organization.

Conclusion

Organization development consultants who use Bowen theory in their work find that it provides a fundamentally different orientation to their work and contributes to the overall effectiveness of client organizations. The natural systems research perspective Bowen theory offers allows organization development consultants who use the theory to see individual behavior in the workplace as an outcome of emotional process rather than dysfunction in the individual. The fresh perspective Bowen theory offers adds value by suggesting ways to address thorny organizational problems.

I developed the reference model, based on the practice of organizational development consultants who use Bowen theory to offer an introduction to applying Bowen theory to work systems. The model emphasizes the consultant's stance as a coach and neutral observer with a systems perspective and references Bowen theory concepts throughout the consulting process. Organization development professionals interested in viewing organizational functioning through a natural systems lens can use the reference model to learn how Bowen theory could help them and their client organizations.

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