The Legacy of Susan Wheelan

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Abstract
Dr Susan Wheelan, scientist, author, teacher and practitioner in the field of group research and development, passed away in November of 2019. This article was written to commemorate her life and work.

Keywords
Susan Wheelan, group development, GDQ

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Susan Wheelan was a graduate of the University of Wisconsin-Madison with a PhD in Psychology. In her early career Wheelan worked as a clinical psychologist but soon turned her focus to the study of groups. She combined science and practice throughout her career. She was a professor of Psychological Studies and Faculty Director of the Center for the Study of Psychoeducational Processes at Temple University, Philadelphia, Pennsylvania for 28 years.

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The Theorist

Wheelan developed the Integrated Model of Group Development (the IMGD). It integrates earlier models of group development suggested by Tuckman (1965), Bion (1961), Bennis and Shepard (1956), and Bales (1965) among others.

The IMGD describes how groups move through four distinct stages and a termination stage (Wheelan, 2005, 2016):

**Stage 1, Dependence and inclusion:** At this stage, members are dependent on the leader and concerned with issues around inclusion. The goal is to establish safety and sufficient structure for the group to start working. Members are hesitant to express divergent views.

**Stage 2, Counter-dependence and fight:** With a growing sense of safety, members start expressing different views. The team works on integrating these and freeing themselves from their dependence on the leader. Groups that have difficulties integrating their differences may resort to scapegoating the leader and/or individual members. The goal in stage 2 is to solve task conflicts, avoid personal conflicts, and to clarify goals and work procedures.

**Stage 3, Trust and structure:** The integration of differences and reallocation of authority moves the group into stage 3. When members find that different views are accepted, trust increases. Members realize that they are interdependent. The focus now is the balance between interdependence and individual autonomy and the continued clarification of goals, roles and work processes.

**Stage 4, Work and productivity:** As a result of the continued work on roles, goals and work processes, the group reaches the highest stage of development, stage 4. Effectiveness, cohesion and work satisfaction are high. The group works as a team. Leader dependence is low.

Termination: Many groups don’t have a preset end date, but some do. The termination stage is an opportunity to look back and learn from experiences.

Wheelan did not assume that all work groups go through these stages in a similar manner. Groups proceed and retreat, moving one step forward and two steps backward. She was, however, a strong advocate of the idea that group development is not random, and that if groups do evolve (not all groups do) they do so in stages that build on earlier stages in a predictable way. Two of Susan Wheelan’s many books, *Group Processes: A Developmental*
Perspective (Wheelan, 2005) and Creating Effective Teams: A Guide for Members and Leaders (Wheelan, 2016) provide a deeper review of the IMGD.

The Teacher

Wheelan was a master teacher and was awarded The Great Teacher Award at Temple University. She was revered by students and developed a generation of scholar–practitioners in the field of Organization Development. Wheelan instilled the practices of utilizing research as the bedrock for organizational consulting and principles of social justice as the guiding values. Group dynamics in the classroom were interwoven into the theories of group dynamics, and implicit biases were uncovered and challenged. This awareness was a call to action in Wheelan’s classroom. Her students went on to follow in her footsteps, pay it forward, and use research and social justice as a foundation for doing good in the world.

The Practitioner

When Wheelan started studying work groups there was no reliable and valid group assessment instrument in the literature that could measure group development and provide useful information to groups. She started working on creating such an instrument that she could use to help the groups to which she was consulting. She was dissatisfied with the frequently untested or atheoretical training and consultation approaches she saw being implemented. A reliable and valid assessment instrument would provide the teams with theoretical as well as empirically tested information on which they could base their development strategies. The result of this work was the Group Development Questionnaire (the GDQ).

Wheelan ran her first certification for GDQ practitioners in 1997 and came to Sweden for the first time in 2005 to certify a group of Swedish consultants. A Swedish translation of the GDQ was made. She came to Sweden many times over the years, certifying consultants and helping to develop a certification process and build a community around the GDQ. There are now two thousand certified GDQ consultants in the world and the GDQ has been translated into 12 languages. Thousands of groups have been helped in their development by the GDQ and Wheelan’s deep insights into group processes. Wheelan worked for many years as a consultant and as president of GDQ Associates, Inc. before she retired and passed the rights to the GDQ over to her Swedish colleagues.
The Researcher

Wheelan used an abductive approach in research on small groups, trying to confirm or reject the fit of a theoretical framework with observational data, comparing and adjusting. Wheelan developed the Group Development Observational System (the GDOS) (Verdi & Wheelan, 1992; Wheelan & McKeage, 1993; Wheelan et al., 1994). The GDOS had seven categories of verbal communication for observing behaviour in groups. The GDOS was to a great extent inspired by Bion’s (Bion, 1961) ideas about the “work group” (mature and task-focused), and the “basic assumption group” (immature and relation-focused) and contained categories such as fight, flight, dependency and work statements.

Wheelan’s theoretical model, the IMGD, was first studied by means of the GDOS (Wheelan et al., 1994) and later with the GDQ (Wheelan & Hochberger, 1996) and was a central part in about 30 doctoral theses (e.g., Brunner, 2003; Davidson, 2001; Wiens, 1997) and about 60 peer-reviewed articles (e.g., Wheelan & Tilin, 1999; Wheelan et al., 2003). The GDQ was later part of other researchers’ studies (e.g., Gren, 2017; Jacobsson et al., 2014; Söderhjelm et al., 2018). Very few theories or models of group development have been studied that much, and far too many academics are satisfied with just suggesting a model, without any data to support it. Wheelan was very confident when people asked about the research on her model. Sometimes she said “there is no other model in the field with that amount of studies.” She was more interested in data and practicalities than in theoretical discussions, because she wanted to improve practice. She was a scholar-practitioner. Some examples of findings from research with the GDQ are that groups that have developed to later developmental stages compared to those in earlier stages:

- have more satisfied customers and managers in the service sector (Wheelan et al., 1998);
- have more surviving patients in intensive care (Wheelan et al., 2003);
- have students performing better on national tests in schools (Wheelan & Kesselring, 2005);
- have members that experience higher levels of work satisfaction and lower levels of emotional exhaustion in manufacturing industry (Jacobsson et al., 2014);
- have a greater ability to adapt to agile ways of working among software engineering teams (Gren, 2017);
- have a greater ability to implement lean methods in the health care sector (Ulhassan et al., 2014).
In 2015 Wheelan received Sage Publishing’s Cornerstone Author Award to celebrate her work as a mainstay in the discipline of group research and the lasting impact of her work. Wheelan consulted and engaged in research projects with hospitals, school systems, prisons, corporations, and non-profit organizations, such as the Provincetown AIDS Support Group, all over the United States and Europe.

Concluding Statement

Wheelan stated that “Most groups contain people who are trying to do a good job. They may not know how, they may not be socially skilled, but they are trying.” She advised team members to examine factors other than personalities that might be blocking progress. She also advised group members not to take things too personally nor to expect to reach perfect harmony. A group’s success, she wrote, didn’t depend on members liking one another but on working through conflicts and paying attention to shared goals.

Declaration of Conflicting Interests

The author(s) declared no potential conflicts of interest with respect to the research, authorship, and/or publication of this article.

Funding

The author(s) received no financial support for the research, authorship, and/or publication of this article.

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