



GO Global Organization
Design Society

Designing Organizations for Value-Creation, Sustainability and Social Well-Being

PRE-CONFERENCE PROGRAM

JULY 13TH, 8:00 A.M. - JULY 16TH, 4:30 P.M.

CONFERENCE

JULY 16TH 6:00 P.M. - JULY 19TH 4:30 P.M.

You can assess for yourself the quality of the developmental and validation research work that has been done on requisite organization and its previous namesakes over the past 50 or so years by reviewing [The 4th Edition of the Requisite Organization Annotated Bibliography](#).

And you can assess the quality and impact of RO implementation work by studying the GO Society website's [Resources and Materials page](#).



Most accommodation and all program activities take place at the
BMO Financial Group Institute for Learning
3550 Pharmacy Avenue, Toronto Ontario Canada M1W 3Z3

To inquire about registration, call the GO Society at 416-463-0423,
or email: KenShepard@GlobalRO.org

Prices include conference fees, accommodation, meals, breaks, taxes and gratuities

Let's Get Organized! (Day One)

A two-day pre-conference introduction to Requisite Organization

Many of today's experienced RO practitioners learned the ropes by working in organizations with well-designed and executed RO projects. They benefited from committed project sponsors and champions, qualified external consultants and significant investment in RO training programs. Some companies send managers to public workshops for formal RO training when available.

There are relatively few public workshops to provide learning opportunities for those not lucky enough to be in well-designed and funded RO projects. The GO Society is proud to present opportunities to learn from experienced ex-line managers and management consultants who have worked with global companies in implementing this well-researched system of management and organization design

Room 105
8:00am - 5:00pm

Let's Get Organized! (Day One)

Who should attend?

Managers, consultants and academics that wish to gain a solid understanding of RO concepts and their effective application. Those wanting a refresher on RO. It is highly recommended for those new to RO who wish to attend the Wednesday and Thursday conference sessions.

Workshop Staff

Barry Deane, PeopleFit: Australasia
Sheila Deane, PeopleFit: Australasia
Herb Koplowitz, Terra Firma Consulting: Canada

Features:

Foundational RO concepts
Well-developed program for teaching these concepts to managers in a way that reforms their basic ideas about management just-in-time so that they can achieve breakthroughs in their work effectiveness

Full Agenda:

[Click here for full Let's Get Organized Workshop Details](#)

SATURDAY, JULY 14TH

Room #105
8:00am - 5:00pm

Let's Get Organized! (Day Two)

Room #104
8:00am - 4:30pm

Global Organization Design Society Board Meeting

SUNDAY, JULY 15TH

8:00am - 4:30pm
Room #105

Legacy Day: By invitation.

Honoured guests include: **Richard B.D. Brown, David Billis, Warren Kinston,** and **Ian Macdonald. Ralph Rowbottom** and **Gillian Stamp** sent their regrets.

All day

Others:

Room & meals are provided for those who attended the two-day training and are staying over for the Monday workshop and conference.

We encourage you to take advantage of the Institute's pool, sports facilities, and exercise room.

You may wish to see some of Toronto's many attractions, walk the boardwalk along Lake Ontario, visit our varied ethnic communities and their restaurants, or visit the museums, or to make use of the Institute's social, library, or computer facilities.

Requisite Compensation:

Understanding Felt Fair Pay and How to Implement It

Room 104

8:30am - 4:30pm

Purpose:

Requisite organization principles provide a template for designing a complete pay system that links compensation structure to organization structure. The use of requisite concepts enables employees to be paid fairly and differentially based on the level of work of their role without the extensive use of compensation consultants and salary surveys. This workshop will provide you with the basic requisite felt fair pay principles and case studies that illustrate these ideas in practice. You will also learn how to implement a requisite pay structure and what is necessary to prepare the organization to do so.

Who should attend?

This workshop is suitable for business people, consultants and academics that have a background in requisite organization principles and practices and who wish to learn how to understand and implement felt fair pay.

What you will learn:

Getting compensation right is critical to attracting and retaining employees, controlling costs and achieving organizational excellence. CEO's want the right answer to questions such as, "What is it that the organization ought to be paying for?" How should we deliver that pay? This workshop will provide you with the principles and practices to answer these questions. It describes real world examples of how to establish pay systems that provide equitable differential compensation for the level of work in every role in your organization and each individual's effectiveness in carrying out his or her role.

Employees paid fairly and equitably will not only feel fairly treated, but will choose to release their full capability and creativity in doing their work. You will be able to answer such questions as: What is a fair amount of pay for a CEO relative to others in the organization? In addition to a conceptual model of fair, differential compensation, participants will receive a paper Requisite Compensation written by Nancy R. Lee and Guidelines for Organizational Readiness for Felt Fair Pay by Sandi Cardillo.

Workshop Staff



Nancy R. Lee, President of Requisite Organization Associates Inc., will present the basic principles of requisite compensation and will describe steps to use in implementation.



Charlotte M. Bygrave, Principal, Bygrave & Associates, and formerly SVP HR at Roche Canada, will describe a project she led working with Dr. Elliott Jaques and Nancy Lee to implement felt fair pay in Roche including eliminating incentives.



Sandi Cardillo, Director of Human Capital at First National of Nebraska, will describe the relationship between requisite managerial leadership practices and their use in preparing to implement requisite compensation.



Sabrena Hamilton, SVP HR at Novus International will describe the use of these concepts in a company with employees in 70 countries

Strategic Positioning of the HR Function: Implications for Corporate Role, Department Design, and HR Careers

Room #206

8:30am - 4:30pm

Who should attend?

HR vice-presidents and directors who wish to understand how RO principles can help them manage their own careers, redesign their own HR function, and to provide strategic support to senior line managers in re-designing the organization, talent pool management, and designing effective cross-functional systems and processes.

What you will learn:

- An overview of a requisite organization approach to HR through the story of an HR executive who transformed her professional life and contribution through RO.
- Levels of HR work complexity and examples of work activities
- Understanding your career path – a personal story using the age-capability progression charts tying personal capability by age to levels of HR work. Examples of HR careers
- The radical step from transactional HR work in at strata I, II, and III, to strategic HR work at stratum IV
- Redesigning the HR function to redesign and align previously fragmented HR transactional services, and to add new strategic activities.
- Supporting the CEO with the senior team and effective processes
- Organization design
- Talent pool management
- Designing effective systems aligned with values and strategy - including effective cross functional relationships
- A panel of several VPs HR sharing their experiences in working with RO.

Workshop Staff



Rich Morgan, COREinternational,



Anne Stephen,

To be arranged

To be arranged

Spiral Dynamics: Focus on the Organization

Room 105

8:30am - 4:30pm

Workshop Staff



Don Edward Beck, Ph. D.,

Co-founder and Co-Director, The National Values Center, CEO, The Spiral Dynamics Group. Founder, the Institute for Values and Culture. Beck is the coauthor of *The Crucible: Forging South Africa's Future* (with Graham Linscott, 1991) and *Spiral Dynamics: Mastering Values, Leadership & Change* (with Christopher Cowan, 1996).

About Spiral Dynamics and the workshop

Spiral Dynamics is based on the seminal work of Professor **Clare W. Graves**, Union College, New York. I first started working with Professor Graves in 1975 and have played the major role in both introducing his conceptual world, and in extending his basic research in the areas of organizational design and geopolitical transformations.

Because the model, known as Spiral Dynamics, addresses the deep value system DNA-type codes at the core of companies and communities, it offers a dynamic model for both design and change of these human groupings.

Most of my early work dealt specifically with applications in business, education and government. During the long South African initiative (63 visits to Johannesburg) I was deeply involved in practically every major business in that country.

This is when I first encountered the work of **Gillian Stamp** and her colleagues in business who were, at that time, quite active in a number of major industries. We found common cause in blending the two technologies, since each offer a unique perspective on getting systems set right in terms of both functions and specific role within the organization.

Spiral Dynamics, in many ways, appears to operate at a deeper conceptual level to offer evidence for the levels that **Elliott Jaques** and **Gillian Stamp** had identified, so becomes an effective selection and placement methodology.

This specific application of Spiral Dynamics will introduce a CultureSCAN instrument that is now being used in a number of major corporate structures in the United States and Europe. Further, because of our focus on what is called Natural Design, we will extend the application into virtually every area of corporate life, from selection to placement to marketing to management and even to interface with various stakeholders

Preparation

Requested: Take the CultureSCAN instrument on line.

Recommended & optional:

- Read Spiral Dynamics, Chapters 5, 6, & 7
- Explore Don Beck's web site.

Research & Doctoral Consortium

Room 208

8:30am - 4:30pm

Who should attend

- Academics and Deans who wish to strengthen their research work by incorporating key RO variables.
- Editors and writers.
- Doctoral students already doing RO-related research.
- Doctoral students exploring whether an RO-related dissertation is a path with heart and good for their careers.

Workshop Staff

Catherine G. Burke, Ph.D. Professor, School of Public Administration, U. of Southern California (USC).

Kenneth C. Craddock, Columbia University, The GO Society's Research Director

Jerry L. Gray, Ph.D., Dean Emeritus of the Asper School of Business at the U. of Manitoba

James G. (Jerry) Hunt, Ph.D., Paul Whitfield Horn Professor of Management, Director, Institute for Leadership Research at Texas Tech, Rawls College of Business Administration, Texas Tech University. Member of numerous Editorial Review Boards, and author of texts

T. Owen Jacobs, Ph.D. formerly Research Director, Army Research Institute (ARI)

*Note: **James G. (Jerry) Hunt** and **Jerry L. Gray** were both Editors of the GO Society's first book, Organization Design, Levels of Work and Human Capability; Executive Guide, to be released at this conference. Other GO Society members were also contributors to the book.*

Preparation

- Read the Introduction to the Requisite Organization Annotated Bibliography (download from GO Society web site).
- Attend the Let's Get Organized! – Intro to RO workshop on July 13th & 14th (if appropriate).
- Prepare a short statement of your current research and interests, and
- Telephone interview with Kenneth C. Craddock.

Agenda

- Coming together – who's in the room – sharing backgrounds and interests
- An overview of RO research – **Kenneth C. Craddock, T. Owen Jacobs, and James G. (Jerry) Hunt**
- Small group break out on research and teaching issues identified in the group
- Plenary work on a series of issues – group input to advance individual research projects
- Planning for post-conference support, collaborative writing projects, and proposals for consultants and business executives.

Evening Agenda

6:00pm - 6:30pm

General Reception

CEOs Reception - by invitation

Deans' Reception - by invitation

6:30pm - 7:00pm

Conference Opening – Part I (All groups assembled)

Moderators: **Ken Shepard, Judy Hobrough, and Harald Solaas**

7:00pm - 9:30pm

General Dinner and Conference Opening - Part II

7:00pm - 9:30pm

CEO Dinner - by invitation Hosts: **Jack Fallow** and **George Weber**

Sharing interests and experiences in leading RO projects in their organizations

7:00pm - 9:30pm

Deans' Dinner – by invitation

Hosts: **Larry Tapp**, Dean Emeritus of the Ivy School of Business at the University of Western Ontario, **Jerry L. Gray**, Dean Emeritus of the Asper School of Business at the University of Manitoba, and **James G. (Jerry) Hunt**, Paul Whitfield Horn Professor of Management, Rawls College of Business Administration, Texas Tech University.

Executive Day

Auditorium (for all activities except meals)

- | | |
|--|--|
| 8:30am - 9:00am | <ul style="list-style-type: none"> • Welcome and Celebration |
| 9:00am - 9:40am | <ul style="list-style-type: none"> • Organizing to plan and to control strategic risk: A Levels-based Approach
Michael E. Raynor, Deloitte, and author of the Strategy Paradox |
| 9:40am - 10:15am | <ul style="list-style-type: none"> • RO in a Small Manufacturing Company
Art Mann, CEO, owner Donsco (a metalurgy company) |
| Conversation break | |
| 10:35am - 10:45am | <ul style="list-style-type: none"> • RO in a Financial Services Training Firm: Applications both on the firm itself but also in designing products and services for its direct and indirect clients.
Norm Trainor, CEO, The Covenant Group (video tape) |
| 10:45am - 11:20am | <ul style="list-style-type: none"> • RO Goes to Church: Application to the growth and development of a mega-church.
John Morgan, Senior Pastor, Pinion Hills Community Church |
| 11:20am - 11:50am | <ul style="list-style-type: none"> • RO in a Major Stratum VII Global Corporation
Mark Cutifani, EVP Operations, CRVD INCO |
| Lunch (Dining Hall)
Noon - 1:00pm | <ul style="list-style-type: none"> • Lunch Conversations at signed tables with morning speakers including: Afternoon panel member lunches. |
| 1:00 p.m. | <ul style="list-style-type: none"> • U.S. Army Transformation Update: The Synergies of RO together with the World's Largest Lean Six Sigma Project
Michael Kirby, Deputy UnderSecretary, Business Transformation, U.S.Army and Stephen D. Clement, U.S. Army |
| Conversation Break | |
| 2:30 p.m. | <ul style="list-style-type: none"> • Personal Reflections: CEO Panel. Moderator: Jack Fallow
Panel: Judith Shamian, Ron Harding, and Stephen Xenakis |
| Conversation Break | |
| 3:45 p.m. | <ul style="list-style-type: none"> • Experiencing transitions in level of executive work
Moderator: Judy Hobrough
How the nature of the work changed as I moved through levels
My experience of these changes |
| 5:00 p.m. | <ul style="list-style-type: none"> • Adjourn |
| 6:30pm - 7:45pm | <ul style="list-style-type: none"> • Dinner |
| 8:00pm - 9:15pm | <ul style="list-style-type: none"> • Dialogue on Values and Ethics in RO – The Human Being at Work
Panel: John Bryan, Warren Kinston, and Ian Macdonald |

Auditorium

8:00am - 8:45am

- **Good Morning & Overview of the Day**
Systems Leadership: Structure is Not Enough
Ian Macdonald: The Macdonald Consultancy

8:45am - 9:00am

- **Conversation Break**

Session W-1

Room 104

9:00am - 10:30am

- **Issues in cognitive assessment in organizational settings: recruiting, talent pool development, individual career coaching**
Moderator: **Herb Koplowitz**
Panelists: **T. Owen Jacobs, Theo Linda Dawson, Glenn Mehlretter, Mike Jay, Otto Laske?, bioss representative.**
 - A historical perspective on cognitive assessment in organizations: Jaques's and Stamp's contributions
 - Drastically different results with four different methods.
 - Comparing managerial assessments and calibration assessments with time, cost, and accuracy of instrumented / interview based assessment.
 - Evolving methodologies
 - The contingencies of choosing methods.
 - Ethical issues
 - Research issues

Session W-2

Room 105

9:00am - 10:30am

- **What sticks? The Enduring Nature of RO Interventions**
Moderator: **Alan Pearson**
Panelists: **Rob Savan** (BMO Financial Group, Personal & Corporate Banking), **Donna Price** (CIBC), **Geoffrey Ganz** (video?), **Charlotte Bygrave** (Roche Canada), – all to be confirmed

Session W-3

Room 206

9:00am - 10:30am

- **Capturing the Synergies of RO with Quality / Lean Six Sigma**
Moderator: **Pablo Kanterewicz**
Panelists: **Kenneth C. Craddock, Stephen D. Clement, Michael Kirby, Sheila Deane, Michael Friedman, and Jack Fallow**

Session W-4

Room 208

9:00am - 10:30am

- **Use & Abuse of RO in Religious Organizations**
Moderator: **John Bryan**
Panelists: **John Morgan, Ian Macdonald, Glenn Mehlretter, and Stephen Xenakis**

10:30am - 10:45am

- Conversation Break

Session W-5

Room 104

10:45am - 12:15pm

- **The nature of work at strata V, VI & VII and the transitions**
Moderator: **Judy Hobrough**
Panelists: **Glenn Mehlretter, David Billis, Mark VanCleaf?**

Continued on

WEDNESDAY, JULY 18TH (CONTINUED)

Auditorium (for all meetings except meals)

Session W-6
Room 105
10:45am - 12:15pm

- RO in Health Policy & Service Delivery Organizations
Moderator: **Jerry L. Gray**
Panelists: **Stephen Xenakis, Warren Kinston, Judith Shamian, Paul Holmstrom**

Session W-7
Room 206
10:45am - 12:15pm

- Designing the Requisite HR function & RO
Moderator: **Rich Morgan**
Panelists: **Anne Stephen, Maurice Dutrisac,**

Session W-8
Room 208
10:45am - 12:15pm

- Designing the Requisite IT Function
Moderator: **Catie Burke**
Panelists: **Dan Smith, Paul Tremlett, Neil Kemp, (Alf Rock, Paul McDowell – to be confirmed?)**

Lunch (Dining Hall)
12:15pm - 1:00pm

Lunch in Special Interest Tables – Planning to write monographs

- Requisite Lean Six Sigma
- Requisite cognitive assessment
- Requisite Executive Coaching
- RO in religious organizations? Just how and when?
- Requisite HR
- Requisite IT
- Requisite Health Policy and Health Care

Session W-9
Room 104
1:00pm - 2:30pm

- **Levels in Military organizations**
Moderator: **T. Owen Jacobs**
Panelists: **James G. (Jerry) Hunt, Stephen D. Clement, Michael Kirby,** representative from Canadian Forces

Session W-10
Room 105
1:00pm - 2:30pm

- **RO & Compensation**
Moderator: **Nancy Lee**
Panelists: **Peter Taylor, Don Fowke, Art Mann**

Session W-11
Room 206
1:00pm - 2:30pm

- **RO in Not-for-Profit Organizations**
Moderator: **George Weber**
Panelists: **David Billis, Judith Shamian?,** (United Way rep to be confirmed)

Session W-12
Room 208
1:00pm - 2:30pm

- **Requisite Strategy Formulation & Implementation**
Moderator: **Ken Shepard**
Panelists: **Michael Raynor**

2:30pm - 3:00pm

- **Conversation Break**

Continued on

WEDNESDAY, JULY 18TH (CONTINUED)

Auditorium
3:00pm - 5:00pm

Marketplace of Ideas Facilitator: **Paul Tremlett**

- Planning effective book marketing / publicity
- Developing the academic community
- Building a research agenda:
- Securing foundation grants / corporate sponsorship.
- Planning a publications program
- Exploring how to support consultant development
- Exploring the branding issue
- Educating the next generation of RO practitioners
- Assumptions about people at work
- Building a co-creative / collaborative website

5:00pm - 6:30pm

Dinner (Social Area and Courtyard)

6:30pm - 7:45pm

Rest Period

8:00pm - 9:00pm

The Lighter / Darker Side of RO: Skit night

RO Cartoons , Graphics, "Requisite Shadows", "The Dilbert Antidote", "What can go wrong will." "The RO Project Gone Very Wrong". And other embarrassing facets.

Auditorium
8:00am - 8:45am

- **Morning Announcements**
- **The Work Levels Approach in Three Multi-national Corporations** – common issues and dilemmas.
David Billis, Senior Reader, London School of Economics

- **Conversation Break**

Session Th-1
Room 104
8:45 am - 10:30 am

- **Requisite Executive Coaching**
Moderator: **Peter Taylor**, bioSS europe
Panelists: **Mike Jay**, **Laurence Lyons** (by video), **Otto Laske?**

Session Th-2
Room 105
8:45 am - 10:30 am

- **Teaching RO in different settings & levels**
Moderator: **Gerald Kraines**
Panelists: **Jerry L. Gray** (undergraduates); (MBAs)' (Executive MBAs); **Gerald Kraines** (Public Workshops); **Harald Solaas** (Training Practitioners); **Sheila Deane** (RO projects)

Session Th-3
Room 206
8:45 am - 10:30 am

- **Ethical dilemmas in RO practice**
Moderator: **John Bryan**

Session Th-4
Room 208
8:45 am - 10:30 am

- **Evolutionary / stage theories of value development dynamics and diagnosis / other levels approaches**
Moderator: **Warren Kinston**
Panelists: **Glenn Mehlretter**, **Mike Jay**, **Herb Koplowitz**, **Ken Craddock**

- **Conversation Break**

Session Th-5
Room 104
10:50 a.m.-12:20 p.m.
8:45 am - 10:30 am

- **RO Metrics, Data Bases, Software, before and after research**
 - **Gerry Kraines**
 - **Glenn Mehlretter**
 - **David Creelman**
 - **Ulf Lindberg** – developing a national data base

Session Th-6
Room 105
10:50 a.m.-12:20 p.m.

- **Expanding assessment to emotional development** – relative to cognitive development and to levels of work
Moderator: **Mike Jay**
Panelists: **Otto Laske**, **T. Owen Jacobs**, **BioSS**, **Dick Thompson**, **Glenn Mehlretter**

Session Th-7
Room 206
10:50 a.m.-12:20 p.m.

- **Levels in Government – Not-for-profit contracting & central vs community boards**
Moderator: **David Billis**
Panelists: **Warren Kinston**, United Way Agency? Ontario Community Services rep?, **Jim Rice**, **Colin Maloney**, **Jerry Gray**

THURSDAY, JULY 19TH

**Session Th-8
Room 208**

10:50 a.m. - 12:15 a.m.

- **Academic papers**
 - **Sergey Ivanov**
 - To be arranged.

Lunch (Dining Hall)

12:15p.m. - 1:15p.m.

- **Lunch Scheming:** Special interest tables for planning future writing projects and publications

Auditorium

1:15pm - 2:30pm

- **Requisite Theory Implications for our Society's Future**
- **RO a major management paradigm by 2015?**
Herb Koplowitz & Ken Craddock.
- **Democracy and supranational organizations, Jack Fallow**
- Aspects of leadership in Human Nature – implications for the future. **Harald Solaas**
- **Conversation Break**

Auditorium

2:50pm - 4:15pm

- **Planning Our Commitment to the Future** – The GO Board
 - **Scheduling our next regional conferences**
 - **SA** new business model.
 - **S**Reports from Marketplace of Ideas, Research and doctoral consortium, Monograph planning groups

Auditorium

4:15p.m. - 4:30 p.m.

- **Reflection and appreciation**
- **Adjourn**

Click here for registration and cost information
http://www.globalro.org/pick-up/Go07_Reg.doc

CONFERENCE SPONSORS



GO Global Organization Design Society

The Global Organization Design Society was founded in 2004 to establish and operate a world-wide association of business users, consultants, and academics interested in science-based management to improve organizational effectiveness.

The GO Society fulfills its purpose by:

- Promoting among existing users increased awareness, understanding and skilled knowledge in applying concepts of Levels of Work Complexity, Levels of Human Capability, Accountability, and other concepts included in Requisite Organization and/or Stratified Systems Theory.
- Promoting among potential users of the methods, appreciation of the variety of uses and benefits of science-based management, and access to resources.

The GO Society supports the learning and development of current and future practitioners by:

- Holding world and regional conferences,
- Sponsoring public training workshops in the methods,
- Publishing books such as this one, and
- Maintaining a resource-rich website with related articles, monographs, books, and videos.

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