



GO Global Organization
Design Society




Readings in Global Organization Design
2005 Conference Proceedings

Evaluation Process Comparison

by Michelle Malay Carter and Glenn Mehlretter

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Getting Leverage on Job Performance, Satisfaction, and Career Progression

Global Organizational Design Society Symposium, August 2005, Toronto.
 Presenters - Glenn Mehlretter & Michelle Malay Carter. Based upon the work of and in honor of Dr. Elliot Jaques, the father of Progressive Organization.

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In the context of WORK

Job Performance, Satisfaction, & Progression

Ramifications of **CIP**

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Its about doing WORK!

The exercise of judgment and discretion in making the decisions necessary to solve and overcome the problems that arise in the course of carrying out tasks.

Human Capability, p. 10



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Some foundations:

- Person to role fit (**performance**)
 - Capability of the person
 - Description of the role
- Person to manager fit (**satisfaction**)
 - Capability of the person
 - Capability of the manager
- Growth of the person (**progression**)

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Current Applied Capability(CAC)
 The WORK I can do today!

Human Capability, p. 82, Fig 6.1

$$CAC = f(CIP^*, V, K/S, (-T))$$

Current Applied Capability is a function of:
 Complexity of Information* Processes,
 Value and commitment to the task,
 Skilled Knowledge,
 Minus T (if any) inhibits.



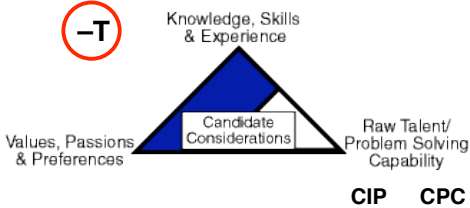
*CIP was CMP: Complexity of Mental Processes

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PeopleFit View of CAC
 Capability Assessment Triangle™



The diagram shows a triangle with three vertices: 'Knowledge, Skills & Experience' at the top, 'Values, Passions & Preferences' at the bottom left, and 'Raw Talent/ Problem Solving Capability' at the bottom right. A box labeled 'Candidate Considerations' is positioned in the center of the triangle. A red circle with '-T' is located to the left of the triangle. Below the triangle, the labels 'CIP' and 'CPC' are shown.

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Current Potential Capability The WORK I could do today if...

- I had the required knowledge and skills, if
- I valued the work, and if
- I were free of any temperamental inhibitors.

CPC = CIP

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For Selection Consider:

- Knowledge, Skills, Experience
- Values, Preferences, Passion
- CIP, Problem Solving

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Quest for Effective Selection

- Personality instruments
- Competency models
- Emotional Intelligence
- Behavioral Interviews
- IQ
- Learning Agility
- SLDI
- CPA & MCPA
- CIP

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Which Tools Give Us Which Information?

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Comparing the tools:

- Describe the tool.
- What does it assume?
- What does the output look like?
- What is the benefit of using this tool?
- What does it miss?
- What does it cost?
- Discussion questions/topics
- Key learning points for you?

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Behavioral Interviewing

- Describe the tool.

A methodology for interviewing that focuses upon gaining evidence of past performance and preferences.

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Behavioral Interviewing

- What does it assume?

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Behavioral Interviewing

- What does the output look like?

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Behavioral Interviewing

- What is the benefit of using this tool?

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Behavioral Interviewing

- What does it miss?

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Behavioral Interviewing

- What does it cost?

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Behavioral Interviewing

Discussion Questions

- How does this methodology impact those with limited experience? (stay at home Moms)
- How does this methodology impact underutilized employees?

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Behavioral Interviewing

- Key learning points for you?

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Competencies

- Describe the tool.

Job Competency: Any underlying characteristic of a person that results in effective and or superior performance in a job. These characteristics can be motives, traits, skills, bodies of knowledge, aspects of one's self image or social role.

How are they derived? A number of techniques exist, such as focus groups, inventories and questionnaires, interviews, diaries and work logs and people based techniques such as observation, and testing.

A hierarchy of behavior indicators are created that point to low, medium, or high levels of this competency. These behaviors are searched for during the interviewing process and a judgment is made.

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Competencies

- What does it assume?

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Competencies

- What does the output look like?

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Competencies

- What is the benefit of using this tool?

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Competencies

- What does it miss?

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Competencies

- What does it cost?

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Competencies

- Discussion Question
 - If “exemplars” were observed or assessed in creating the behaviors associated with a competency, how do we know what their capability relationship (stratum) was to the level of work of the role?

Exemplars: people who represent effective or superior performance in a specific role/job.

What is the more actionable format for the manager: CAT or Competency

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Competencies

- Discussion Question
 - Are competencies like sales acumen or communication skills, stratified?

Sales Acumen
 Want fries with that? versus
 Landing an exclusive contract to supply tires to a big three auto maker.

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Competencies

- Key learning points for you?

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Personality Inventories

- Describe the tool.

Various empirically based tools designed to record a person’s hierarchy of preferences for various personality traits.

Built on factor analysis.

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Example: What do I believe to be my goal as a manager?

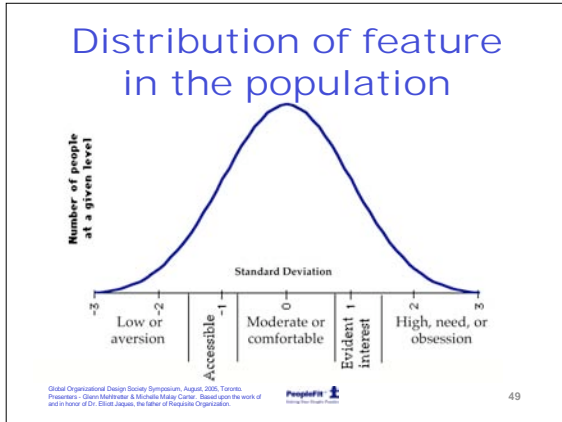
Focus of energy and attention toward:	+	-
Maintaining org structure: keeping current operating practices in place and maintaining current culture and values.		
Developing new processes: creation of different and innovative practices, processes, and procedures. Changes in culture and practice welcome and perhaps generated whether necessary or not.		
Delegating and developing others: The focus is “others” and on making assignments. This might result in less “doing” on the part of the employee him/her self.		
Exercising authority: Pushing for results through exercise of prerogatives.		
Conserving assets and resources: Toward limiting expenditures or conserving and protecting org resources.		

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 Definitions by Stan Smith, Human Patterns ®





CSR Interview Guide

RATING SHEET

Go to the **Interview Work Sheet** and enter your findings into this rating sheet. If you have heard a response in a given category enter the rating indicated at each level. For example, if the candidate "although I didn't enjoy it, I was able to take collection action." If you did not hear a response in a category, enter a question mark (?). If you heard a response in the wrong direction, enter a zero (0). For example, if you heard responses opposite to "Challenging the status quo" such as "I try to get along with everybody", enter a 0 in the rating column.

LABEL AND DESCRIPTION LEVEL 1 TARGETS	RANGE SOUGHT	R A T I N G ENTER (0 or 2)
CHALLENGING AND PUSHING OTHERS (CHALLENGING THE STATUS QUO)	A C C E S S TO HIGH	-----
PERSONAL OBJECTIVES/ ACHIEVEMENT	A C C E S S TO EVIDENT	-----
FOCUS ON PROJECTS OR AUTONOMY	A C C E S S TO HIGH	-----
CONTROLLING OR DIRECTING	A C C E S S TO HIGH	-----
AESTHETIC OR DESIGN	LOW TO MODERATE	-----
PERSONAL GROWTH OPPORTUNITIES	LOW TO MODERATE	-----
DISCOMFORT WITH RISK	LOW TO EVIDENT	-----

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Levels of Factors

Five levels of interest:	Examples for the factor "details or specifics" (Too high an interest in details is not desirable for the CSR role.)
1. Low or aversion	• Details drive me up the wall. (It is unlikely that this person would apply for the CSR role.)
2. Accessible	• I can do detailed work if I have to. • Every week we had to reconcile the inventory numbers, and I was able to do it accurately. (Score 1)
3. Moderate or comfortable	• My current role requires a moderate amount of detail work, I enjoy it, but I wouldn't want that to be the whole job. (Score 1)
4. Evident interest	• I look forward to doing the monthly check book reconciliation. (Score 1)
5. High, need, or obsession	• I am sometimes criticized for being too careful about the details. • I'm excellent at the details. • I could work on the numbers for hours. (After probing to validate the high preference, score 0)

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Personality Inventories

- What does it assume?

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Personality Inventories

- What does the output look like?

Representation of some form of normal distribution or percentile score.
 Letters indicating the hierarchy of factors in the model (MBTI).

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Personality Inventories

- What is the benefit of using this tool?


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Personality Inventories

- What does it miss?


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Personality Inventories

- What does it cost?

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Personality Inventories

- Discussion Question/Topic

Does personality testing have a place in the RO model?

Is so, what place?


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Personality Inventories

- Key learning points for you?

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Emotional Intelligence


Describe the tool

- Tool types vary as do the definitions

Emotional Intelligence Test™ Mayer, Salovey, Caruso (MHS) Ability Measure "the ability to perceive accurately, appraise, and express emotion; the ability to access and/or generate feelings when they facilitate thought; the ability to understand emotion and emotional knowledge; and the ability to regulate emotions to promote emotional and intellectual growth."	BarOn EQ™ (MHS) Emotionally Intelligent Behavior Self Report "an array of noncognitive capabilities, competencies, and skills that influence one's ability to succeed in coping with environmental demands and pressures"	Emotional Competence Inventory™ Goleman (Hay-McBer) Competencies – Observer/Self "emotional competence is 'a learned capability based on emotional intelligence that results in outstanding performance at work'"
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Taken from www.emotionaliq.com


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Emotional Intelligence

- What does it assume?

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Emotional Intelligence

- What does the output look like?

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Emotional Intelligence

- What is the benefit of using this tool?

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Emotional Intelligence

- What does it miss?

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Emotional Intelligence

- What does it cost?

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Emotional Intelligence

Interesting Framework: Emotions contain information about relationships. When a person's relationship with another person or an object changes, so do their emotions toward that person or object. A person who is viewed as threatening is feared, an object that is expected is liked. Whether these relationships are actual, remembered, or even imagined, they are accompanied by the felt signals of relationship status or change that we call emotions. EI, in turn, refers to an ability to recognize the meanings of emotions and their relationships, and to reason and problem-solve on the basis of them. It further involves employing emotions to enhance cognitive activities.

Mayer, J. D., Salovey, P., Caruso, D. R., & Sitarenios, G. (2001). Emotional intelligence as a standard intelligence. *Emotion*, 1, 232-242.

What does a requisite environment do to create a working environment that is predictable and meets with our expectations regarding a satisfying job and good boss? How does CIP influence relationships?

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Emotional Intelligence


Discussion Question

Is there a difference between Emotional Intelligence and Emotionally Intelligent Behavior?

Emotionally unintelligent behavior occurs when emotions impede effective action, and emotionally intelligent behavior occurs when emotions do not impede effective action, or when emotions facilitate effective action. Emotional intelligence (as an ability) is one set of processes hypothesized to promote emotionally intelligent behavior. There are other potential processes.

Jacques G. (Glenorchy) - Associate Professor at the University of Wollongong, Australia


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"Some types of structure facilitate ...normal relationships between individuals, make it easy for them to link into immediate social relationships, and through these into the larger network of institutions which lies beyond, with feelings of trust and confidence. I would call these institutions requisite..."
General Theory... p. 6, 1976



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Emotional Intelligence

Discussion Question

Can one score high on a EI assessment but yet not behave in an EI manner?

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Emotional Intelligence


Discussion Question

- Is perceived EI contextual?

Will the system within which one is operating influence behaviors?

Will the people with whom you are interacting influence your EIB?

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Emotional Intelligence

Discussion Topic

It doesn't make sense to speak of raising EI per se, but it does make sense to speak of raising emotional knowledge and that may be of help to some people.

What Are the Advantages of a More Focused Approach to EI?
by John Mayer

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Emotional Intelligence

- Key learning points for you?

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Learning Agility


- Describe the tool.

Rooted in research conducted at the Center for Creative Leadership concerning how people learn from experience. Delivered by a network of consultants licensed by Lominger, a consulting firm founded by Bob Eichinger and Mike Lombardo.

Designed "To improve [the] ability to identify people who have the potential to perform well now and in the future under new and changing conditions."

www.lominger.com

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Learning Agility

- What does it assume?
Current and future potential can be predicted based on past effective learning in new situations.
"Research indicates that learning how to deal effectively with first-time or changing situations is more predictive of long-term potential or performance than is raw intelligence."
Empirical/factor analysis base

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Learning Agility

- What does the output look like?
Five point Likert scale plot on four factors: Mental, People, Change, and Results agility.
Scale also represented as:
Talented, Strong, Average, Limited, and Weak.

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Learning Agility

- What is the benefit of using this tool?

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Learning Agility

- What does it miss?

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Learning Agility

- What does it cost?

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Learning Agility

- Discussion Question/Topic
Are there ways that Learning Agility might serve as an entry into the technology that deals with specific layers of complexity or capability?

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Learning Agility

- Key learning points for you?

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Career Path Appreciation (CPA & MCPA)

- Describe the tool.

Developed by Gillian Stamp in 1978. Three part process: employment history interview, problem solving phrase cards, and a symbol sort task. Requires an assessor highly trained in Stratified Systems Theory or Requisite Organization. Judgments are made by evaluating the description of work received in the interview, in terms of the characteristics of the various levels of work. This is then combined with the results of the two other tasks.

MCPA is a modified version resulting from construct validity research which indicated that the card sort might be used as a stand alone indicator. This allowed web based delivery and reduced the need for the highly trained expert. However, posted documentation recommends that when accuracy is more critical that the employment interview be done as a confirmation to MCPA results.

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Career Path Appreciation (CPA & MCPA)

Theory based tool

- Levels of work and capacity
- Stratified Systems Theory
- Requisite organization

- Plus empirical maturation/ progression prediction

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Career Path Appreciation (CPA & MCPA)

- What does it assume?

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Career Path Appreciation (CPA & MCPA)

- What does the output look like?

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Career Path Appreciation (CPA & MCPA)

- What is the benefit of using this tool?

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Career Path Appreciation (CPA & MCPA)

- What does it miss?

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Career Path Appreciation (CPA & MCPA)

- What does it cost?

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Career Path Appreciation (CPA & MCPA)


- Discussion Question/Topic

What, if any, are the conditions that would justify use of CPA internal to the organization?

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“...it is precisely in the area of trust, confidence, and love, as against suspicion, hostility, and mistrust, that the concepts of normality and abnormality in personality functioning meet directly with those of the requisiteness and anti-requisiteness of social institutions...” General Theory... p. 8, 1976

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Career Path Appreciation (CPA & MCPA)

- Key learning points for you?

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CIP Observation or Judgment

- Describe the tool.

Jaques and Cason reported on CIP in Human Capability in 1994. With Dr. Jaques coaching Mehlretter was conducting dissertation research, published in 1995. CIP involves observing the structure of speech, and complexity of language, when a person is involved in argument development or problem solving. While the objective is the same as that of CPA (assess current potential capability) the method is different (observation of structure rather than categorizing descriptions of work used for CPA). To gain accuracy, Mehlretter developed a dual assessor process which includes a tie back to benchmarks.

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CIP Observation or Judgment

- CIP
Complexity of Information Processing relates to the amount of complexity a person can deal with at the current time. It is directly related to the highest level within a hierarchical organization at which that person can function. Matching CIP to role complexity defines a minimum requirement for success. A person with CIP below the level of complexity of the role, cannot, independent of efforts to sure them up, perform the role in a satisfactory manner. While CIP does not guarantee success in a role, lack of sufficient CIP does guarantee failure.
CIP determines Current Potential Capability. Therefore the CIP assessment seeks the same output as CPA, but using a different (and what I believe to be, more direct) approach.

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CIP Observation or Judgment

- What does it assume?

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CIP Observation or Judgment

- What does the output look like?

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CIP Observation or Judgment

- What is the benefit of using this tool?

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CIP Observation or Judgment

- What does it miss?

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CIP Observation or Judgment

- What does it cost?

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CIP Observation or Judgment

- Discussion Question/Topic

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CIP Observation or Judgment

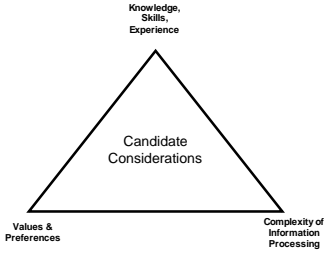
- Key learning points for you?

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Which Tools Give Us Which Information?




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What was Elliott Jaques About?

"... there is hope that bureaucracies themselves can be transformed to become agents of human feeling, pluralism, and community."
General Theory... p. 2, 1976



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OUR PURPOSE

The Global Organization Design Society is a not-for-profit corporation registered in Ontario, Canada to promote the following objective:

The establishment and operation of a world-wide society of academics, business users and consultants interested in science-based management to improve organizational effectiveness for the purposes of:

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.

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