



GO Global Organization
Design Society

Global Organization Design Conference 2005

Achieving potential through liberating structures



CONFERENCE PROGRAM

Current as of Aug 5, 2005

The BMO Financial Group Institute for Learning
3550 Pharmacy Avenue Scarborough, Ontario, M1W 3Z3 Canada
Telephone: (416) 490-4300
August 8 to 11, 2005

Monday, August 8, Evening

CONFERENCE START

- 5:30 pm Reception with Matt Horner at the piano
- 6:00 pm Dinner in the dinning hall
- 7:00 pm Welcome and purpose -- Ken Shepard and Jerry Gray
- Short video of RO/GO history, introduction to the conference space
 - Who we are: Summary of survey results by ABCs – Ken Shepard
Country groups – brief highlights
 - Meeting within interest groups and meeting between groups.
 - The tough questions for our field.
 - Overview of the conference themes and processes.
- 9:30 p.m. Informal time in the social centre (cash bar)

Tuesday, August 9

EXECUTIVE DAY

- 6:45 am – 8:00 am Breakfast - overnight guests full breakfast in the dining room; continental breakfast for day guests
- 8:00 am - 8:20 am Welcome and overview of the day. “Does this stuff really work?” Ken Shepard (moderator) and Jerry Gray, GO Society Board
- 8:20 am – 9:30 am “The DNA of governance—improving the level of board work and choosing and paying the CEO.” Presenters: Edward J. Waitzer, former chair of the Ontario Securities Commission, Alan Sykes (video), with Larry Tapp and Mark Van Clieaf as respondents.
- 10:00 am – 11:00 am “Built to Last – well-designed organizational structures and people development systems endure over 25 years – Business needs and results.” Presenters: Sir Roderick Carnegie (video from Sydney) Leigh Clifford, CEO of Rio Tinto, and Mark Kaminski, Former CEO of Commonwealth Aluminum. Continuity by Julian Fairfield.
- 11:30 am – 12:30 pm Life and death decisions: Identifying and developing the general staff in the US Army – reflecting after 25 years – how well did we do? Presenters: Mr. Michael Kirby, Executive Director of Institutional Army Transformation. and Steve Clement of the Pentagon.
- 12:30 pm – 1:45 pm Lunch
- 1:45 pm – 3:30 pm Management tools so good, I’ve used them successfully in three different businesses. Presenters: Rob Pearce, CEO and President, Personal and Corporate Banking, BMO Bank of Montreal; April Taggart, VP HR Personal and Corporate Banking Services; and Anne Stephen, Corporate VP Organization Design and Effectiveness; moderated by Ron Capelle.

Tuesday, August 9 (continued)

4:00 pm – 5:30 pm	<p>Panel of 6 CEO sharing their personal experiences in tailoring Requisite Organization principles as part of their personal leadership style, senior team alignment, and structure and management systems of their organizations.</p> <p>Moderator: Larry Tapp</p> <ul style="list-style-type: none">• Jos Wintermans, Former CEO Canadian Tire Acceptance• Ruth Hubbard, Former Deputy Minister of several Canadian federal departments• Mark Cutifani, President of the Ontario Division of INCO.• Joe Privott, Retired CEO, Novus International• Sean Jackson is CEO of Meridian Credit Union.
5:45 pm	<p>Reception (harp by Susana Remeny-Prentice)</p>
6:30 p.m.	<p>Dinner</p>
8:00 p.m.	<p>Informal time in the social centre (cash bar)</p>
7:00 am	<p>Breakfast</p>
8:00 am – 8:15 am	<p>Gathering. News, high points from August 9 and overview of the day.</p>
8:15 am – 9:00 am	<p>Plenary. Building an RO-based organization design function in a large organization with minimal resistance. Anne Stephen and Herb Koplowitz</p> <p>Purpose is to set the frame of issues for the day on implementation. A conceptual map to orient us in our deliberations.</p>
9:20 am – 12 pm	<p>Four concurrent sessions all morning:</p> <p>Session 1: Cutting edge business unit design</p> <p>Session 2: Implementing accountabilities and authorities</p> <p>Session 3: Organization design and talent pool and on-line assessment software</p> <p>Session 4: Changing managerial behaviour</p>

Session 1 Room 105

Cutting edge business unit design

Strategy drives structure and vertical alignment – design and process issues

Moderator, first presenter, and wrap up Julian Fairfield

The Link to strategy: business planning and review – a new cut at functional alignment in business units. Julian Fairfield's Model from Levels of Excellence with examples of lifting functions to compete effectively for sustainable growth and cost savings by designing functions at higher levels.

- Top-line business growth in a flat market – Dramatically successful application of RO at Inglis Canada by Maurice Dutrisac and Steve Clement
- Roche Canada - Charlotte Bygrave

Session 2 Room 104

Understanding and implementing accountabilities and authorities

Includes conceptual clarification, policies, skills, accountabilities and reinforcement systems in implementing accountabilities.

Moderator - Paul Tremlett

- Evolution in our understanding of Accountability, Gerry Kraines
- Managers and TARRS The Impact of Person-Job Role and Person-Superior Fit on Employee Satisfaction. Beverly Nyberg, GWU
- Investigating the Optimum Manager-Subordinate Relationship of a Discontinuity Theory of Managerial Organizations. Sergey Ivanov, George Washington U.
- Right-Fit Training Model. Beverly Nyberg, George Washington U.

Session 3 Room 206

Organization Design, Talent Pool, Assessment and Mapping Software

Moderator: Don Fowke

- Web-enabled Career Path Assessment, the BIOS Mapper for role complexity and accountability: two software packages: Judy Hobrough and Richard Sales.
- Global Talent Management: an integrated system and software: Don Fowke.
- OrgPublisher: charting software by Aquire: Lois Melbourne.

Session 4 Room 208

Changing managerial behaviour

The effective managerial leadership practices, feed-back and training: four different approaches to this topic

Moderator: John Bryan -- the whole person at work.

- Attractive Leadership – Jack Fallow
- 360 feedback - as Requisite as possible" - Ken Wright
- 360 feedback: Paul Holmstrom

Respondent's comments: -- Herb Koplowitz

12:00 pm – 1:00 pm

Lunch

1:00 pm – 3:00 pm

Four concurrent sessions

Session 1: Capability assessment methods

Session 2: Building business user awareness of these organizational design concepts/and effective marketing.

Session 3: Global Organization Design in Government, and the Not-for-Profit/Social Sector organizations

Session 4: How well does this stuff really work?

Session 1 Room 105

Capability assessment methods

Moderator Catie Burke

- Career Path Assessment and MCPA by Judy Hobrough and staff
- Complexity of Information Processing (CIP) by Glenn Mehlretter
- Manager-once-removed led Gearing or Calibration sessions, Gerry Kraines

Session 2 Room 104

Building business user awareness of these organizational design concepts and effective marketing

Moderators Ulf Lundberg

- Sweden – Ulf Lundberg
- The BIOS effort world-wide - Piet Calitz
- The Macdonald Consultancy – David Dadswell
- Australia - Barry Deane
- Canada - Paul Tremlett
- USA - Nancy Lee
- Brazil - Marcos Bruno

Session 3 Room 206

Global Organization Design in Government, and the Not-for-Profit and Social Sector organizations

Co-moderators Ruth Hubbard and Dwight Mihalicz

- Opportunities and obstacles to effective use of RO concepts in the public service. Ruth Hubbard Former DM Public Service Commission of Canada and several other federal departments.
- Creating an organization design to deal with global complexity, International Federation of Red Cross and Red Crescent Societies – George Weber, Former Secretary General (CEO) of the Federation, and currently CEO of the Canadian Dental Association
- Radically improved client service in the Canadian Passport Office - Robert MacPhee, former CEO of The Passport Office

Session 4 Room 208

How well does this stuff really work?

Co-moderators Jerry Gray and Ken Craddock

A mix of executive experience and measurement/evaluation impact – implications for our future research and teaching agendas.

- Top-line business growth in a flat market – impressive quantified results. Dramatically successful application of RO at Inglis Canada by Maurice Dutrisac
- Two research approaches to measuring alignment of positions and capability fit to role by Ron Capelle and Glenn Mehlretter
- Planning a research agenda: What's our current state of theoretical knowledge? What do we know and what don't we know? Where are the greatest opportunities?

3:00 pm – 3:30 pm

Health Break

3:30 pm – 5:30 pm

Market Place of Ideas

Moderator / Facilitator: Paul Tremlett.

- How to market and sell RO/GO internally and externally
- Theoretical issues and building our future research agenda
- How to overcome barriers and implementation issues
- CEO project sponsorship and continuity given short CEO tenures
- Building general awareness of key RO/GO principles (Public education, influencing the media and marketing issues)
- GO Society building issues (Reflecting on ABC relationships and synergies, shared principles, ethics and behavioural norms, client confidentiality, etc)
- Training the next generation of RO/GO practitioners.
- Influencing future managers through increasing the teaching of RO in management courses at all levels.

6:30 pm

Dinner - Barbeque in the courtyard

8:00 pm

[All The World Is Requisite](#). The human experience of levels work and people in literature and drama

Levels of Work are part of everyday life and have long been described by the poets and writers. Jaques “discovered” it – but like the New World, it was always there. Shakespeare, for one, saw it very clearly. Excerpts from literature and drama depict concepts from RO theory in an insightful and entertaining way.

Note: These selections can be powerful additions to presentations to potential users and in training during project implementations. For example, if you are more capable than your boss bad things will happen to you. People can hear this 100 times but most people feel it simply as a frustrating situation. They really grasp it when they see Macbeth plotting to murder his subordinate General Banquo – because Banquo is more capable than Macbeth. Macbeth is vicious, snarly and hateful. Then he hires two Murderers to do the job. This drives home the point that this really is a Dangerous situation for the subordinate. It is NOT just a Frustrating situation.

[Presenter](#)

Ken Craddock

Wednesday, August 10 (continued)

6:45 am - 8:00 a.m.

Breakfast

8:00 am – 8:30 am

Plenary Day overview

8:30 – 10:00 am

Four concurrent sessions on applying RO/GO concepts.

Session 1: Global Organization Design for the entrepreneur

Session 2: Building functional capability

Session 3: How Global Organization Design concepts and principles can improve the effectiveness of many other traditional management initiatives.

Session 4: Overcoming barriers to hearing, understanding, learning, and applying RO.

Session 1 Room 105

Global Organization Design for the entrepreneur

Moderator Don Fowke

- Don Fowke, Reflections on supporting small business clients with RO-consistent methods.
- Effective managerial practices for leaders of entrepreneurial organizations – Herb Koplowitz
- Consulting with entrepreneurs – Nancy Lee

Session 2 Room 104

How Global Organization Design concepts and principles can improve the effectiveness of many other traditional management initiatives

Moderator Ken Shepard

(Format – poster session review or review of web postings prior to conference, or short 6 minute presentations and questions/ responses –

How RO/GO can improve the effectiveness of

- Strategic planning processes – Julian Fairfield
- Quality and Six Sigma interventions – Ken Craddock and Paul Tremlett

- Re-engineering interventions especially those efforts to improve all relationships with the customer. –
- Socio-technical-systems design
- MBO programs
- Management Development and Training programs
- Executive development and Training interventions especially those behavioural efforts to improve Emotional Intelligence and interpersonal skills -
- Executive coaching programs. Career development:
- Organization Development Action Learning interventions including Appreciative Inquiry, Open Space etc.

Session 3 Room 206

Implementing Requisite Principles in the not-for-profit sector

Moderator Dwight Mihalicz

- Capacity, Capability and Challenge: disseminating and applying RO concepts in New Zealand. Judith McMorland, Auckland, N.Z.
- Invited discussion by others having experience in the not-for-profit field including David Dadswell, Ron Capelle, and many others

Session 4 Room 208

Great collaborations in the development of our field

Presentation and discussion leader Alistair Mant

Great collaboration: Wilfred Brown and Elliott Jaques

Other collaborations including Sir Roderick Carnegie and Elliott Jaques, Steve Clement and Elliott Jaques, David Billis and Ralph Rowbottom and many others

Thursday, August 11 (continued)

- 10:00 am – 12:00 pm **Continuing reflections** on the nature of human capability, evolution, and the development of societies using Levels insights. Human evolution the process of interaction between our positive and negative DNA behavioural predispositions together with our large futuring, abstracting, problem-solving brain. Progress being achieved when we are able to develop institutions and cultures that draw out positive predispositions and manage the negative, regression of the opposite. Seen from this perspective one can get a view of where we have been, where we are now and where we might go.
- Presenter**
Julian Fairfield
- 12:00 pm – 1:00 pm **Lunch.** Informal discussion over lunch Levels of work in our societies.
- 1:00 pm – 2:00 pm **Next steps** in building the GO Society community of practice and diffusion of RO/GO concepts in society. Posters from the Open Space session reporters – gallery walk. Stating our intentions.
- 2:00 pm to 3:00 pm **Priorities in GO Society building**
- Capturing and sharing our conference experience with others
 - The conference proceedings and Audio and video clips on-line
 - Developing shared web resources both for existing RO users (ourselves) and for potential new users. (The GO report)
 - The book and documentary film
 - Planning next conference in Toronto 2007, and nominations for a 2009 site.
- 3:00 pm to 3:30 pm Reflections and wrap up ritual. Photo montage of conference events, put to music with projection.

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GO Global Organization
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The **Global Organization Design Society** is a not-for-profit corporation registered in Ontario 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:

- A 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.
- B Promoting among potential users of the methods, appreciation of the variety of uses and benefits of science-based management, and access to resources.

GO Officers include: Ken Shepard, President (consultant); Jerry Gray, Treasurer (academic); Sue Croft, Secretary (Business user)

GO Editorial Board includes: Jerry Gray, Ph.D., Former Dean Asper School of Business, U of Manitoba; James G. Hunt, Ph.D., Paul Whitfield Horn Professor of Management, and Director, The Institute for Leadership Research at Texas Tech University; Larry G. Tapp, LL.D., Former Dean the Richard Ivey School of Business at University of Western Ontario; and Ken Craddock, M. A. Peer Review Coordinator.

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Public events for senior managers, consultants and academics include public workshops through the year, five pre-conference workshops on August 8 and Executive Day on August 9, all listed on our web site at www.GlobalRO.org/events.htm

Global Organization Design is a style name of the Global Society for Science-based Management incorporated as a not-for-profit corporation in Ontario.



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