

**Socio-technical Systems Roundtable Y2K Salem, Mass.**  
**Report**

Compiled by members of Y2K Design Team  
And  
Members of 2001 Design Team

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## 1. Introduction & Context

Over the past number of years each annual STSR meeting has contained some discussion about the changing nature of the field, globalization, virtual organizations, the evolving nature of STS theory and practice and the potential need for change within STSR. One may describe one extreme of the polarity developing within STSR as “STS is dead” and another extreme as “STS was here before all these new fads and will be here long after.” The reader can judge the degree to which these extreme views of the field may or may not see the need for change in STS and/or STSR.

In this context, the 2000 Design Team was unclear whether or not the Roundtable had provided a mandate for a transformational meeting, and whether or not transformation meant transformation of STSR or STS and/or the field of organization renewal and change. The Design Team was not able to agree and several members resigned. The remaining Design Team members tried to provide a design that would honor both the desires of traditionalists and transformationalists. Consequently, the Y2K STSR meeting in Salem was not a transformational meeting, but it was a potential preparation for a future transformational meeting. Further, the design allowed for discussion of and plans for transformation of the field as well as STSR.

### 1. Design & Agenda

The design process utilized knowledge and practice from Search Conferencing (Emery M, 1999) and dialogue, but was not a Search Conference, nor did it rely solely on any other particular methodology. Prior to the meeting there was some discussion on the listserv that clarified that this was not a Search Conference but rather a unique design.

In essence then the Y2K design flow gathered data on STSR-in-the-field History and Heritage, introduced leading parts of field to get a sense of where the current field and members of STSR are moving, analyzed the History and Heritage data to produce some strategic intents of a sort and then brainstormed bright ideas about what might be done to transform either STSR or the field or both.

This design was accepted and implemented by the members present with one modification. A scan of the environment was added to provide a keener sense of the leading parts of the field and the direction the field was moving. This is recorded below as key developments recorded by small groups in answer to the question “What Are Key Developments in the Field and Emergent/Dominant Practices?”

The specific part of the Search Conference utilized was the History and Heritage data generation session and the Keep, Discard and Create analysis session. The total group brainstormed the History and Heritage of STSR in the context of the field. The entire group brainstormed what to keep, discard, and create from that history and heritage. Small self-selected and self-managed groups analyzed the keep, discard and create lists against self-selected criteria and reported the 6 most important for their group. The whole group integrated these small group lists using Emery’s rationalization of conflict method. The resultant themes were collected and the members present formed table groups to generate Strategic Theme or intent statements and bright ideas against each theme. These are reported below unedited a recorded on flip chart in Salem.

The rest of this report provides flip-charted data collected at Salem chronologically as it was developed.

## 2. History & Heritage

### 1980’s

- Original members were randomly selected with no relation to Norway or the International QWL Council
- Anne Majchrzak did Delphi, Dave Roitman, Bill Duffy
- DEC wanted to learn more about STS and paid for the meetings. DEC sent 8 people to each meeting. Mostly N.A. focus.
- There were 80 names on Ann’s Delphi list
- SME co-sponsored with DEC

- Joyce Ranney made an excellent presentation on TQM and a new track on manufacturing with implications for the workplace began
- 6 formal papers were written and presented first year
- 2<sup>nd</sup> conference had case presentations from several different companies to look at application – state of the field
- 3<sup>rd</sup> year was at Enfield and involved site tour and study
- When DEC/SME funds ran out, and tasks were done, STSR decided to continue to meet on a pay-as-you-play basis and early norms and organization were discussed and formed
- Purpose of STSR developed beyond DEC/SME was to further advance the field of STS
- Every year a design team volunteered and every year the design was different
- The list of names grew and was always longer than who attended the annual meetings
- Balance of academics, managers, consultants, and trade unionists emerged as STSR community
- There was a stronger union presence in the beginning
- 1987 Thorsrud Memorial Conference in OSLO was the 3<sup>rd</sup> or 4<sup>th</sup> international event. Since Arden House there was an international network that STSR felt a part of.
- International members attend STSR periodically
- International conferences include: Arden House, Toronto, Oslo, Melbourne, and there were others
- 70's NATO conference on QWL
- Lou Davis short course, John Cotter's course, U of T STS course (Harvey Kolodny)
- STS was not participative but used design teams in the early days
- General Motors Organization Research and Development and Bill Duffey took a strong interest in STSR
- V.P. Ford attended a couple of years as well
- Shell Canada, Lee van Horne, Norm Halpern, Lou Davis, etc. – field very active
- P&G Lima Plant – 1968
- Topeka – 1971
- Trist at York University in Toronto
- Canadian Government QWL unit; Ontario QWL Centre
- STSR emerged as a different group from the International Network and fathers of STS in the 60's and 70's
- Ecology of Work Conference has Champion International, Exxon and other major corporations showing up in large numbers to here about STS and new form of work organization
- There is a real bell shaped curve marking the growth and decline of the Ecology of Work Conference through the 80's and 90's
- Globalization, downsizing, and the new corporatism influence on STS

### **1990**

- Boston
- Marv Weisbord and Dominick Volini were charged with running a Future Search
- The 90's saw the real proliferation of STS and the concepts became muddy as practice became more diverse
- Many members of STSR started as internal consultants in the 70's and early 80's where Lou, or Eric, or others were external consultants to Greenfield or Brownfield STS projects
- Many members moved to being external consultants in the 80's and early 90's

### **1991**

- San Francisco – Future Search as if STSRT was a real organization
- Many attended invited by Marv and Dominic
- Enlarged membership resulted
- Fred and Merrelyn Emery attended for the first time
- Tom Chase attended for the first time
- Explosion started to occur – Participative Design vs. STS
- Melbourne and Workplace Australia – international conference was held

### **1992**

- Boulder
- Emery does PD session
- Bob Rehm attends and meets Fred and Merrelyn for the first time
- Merrelyn Emery starts NMSU Introduction to OST Workshops

- Pamela Posey attends STSR for the first time
- HP runs the Boulder meeting based on Cal Pava's deliberations and coalitions model
- Fred Emery argues for opening up STSR based on Bill Clinton's election and a chance for workplace redesign in U.S.A. Current size is about 100 people. Fred suggests it could easily grow to 400 quickly.
- 1991-92 Marv comes out strongly and Fred's suggestion may be related
- 1992-93 small groups form in Colorado (Bob Rehm)
- Dick Axelrod conceptualizes and develops the Conference Model largely based on Emery
- Gary Frank, Bill Passmore, Al Fitz and Bob Rehm create Fast Cycle, Full Participation
- Large Group Processes building off Search, Future Search, Open Space etc. – affects STSR
- As new large scale process grew, STS shrank
- STS2 starts in New Zealand, emerges in Australia and comes to STSR in 1996

### **1993**

- University of New Hampshire
- Field appears more connected than early STSR describes it. A few sources. All are aware of each other. Some agreements and some disagreements
- Networking and overlapping circles internationally
- Coalitions developed, books were written, projects done
- Cathy Dannemiller and Robert Jacobs Real Time Strategic Change introduced
- Lou Davis and Lyman Ketchum both attended for the last time
- Agreement to hire Tom Chase as Co-coordinator and to have co-coordinator on design team each year

### **1994**

- Banff
- Deliberation on large group processes
- STSRT constantly bringing in new material
- New coalitions formed
- Educational PDW pre-conference workshop
- Vivian Wright mapping conversations and visual language

### **1995**

- Charleston
- The Australian contingent arrives in force and stays
- Ongoing dialogue in Open Space sessions and white space (HP WIN) about the design and shape of STSR and about STS in the future began and continues today

### **1996**

- Santa Fe
- 2<sup>nd</sup> Educational PDW and Sync rude Case Study – 2-stage model of active adaptation introduced and discussed
- Laurie introduced Chaos Theory
- 2<sup>nd</sup> discussion of new technology – listserv created & used for STS2
- Trade union sub-group ongoing discussion (Nancy Mills, Max Ogden, George Gates, Hill Kemp, Doug Gamble, Mike Noon etc.). Last time trade unionists attended in any number
- Discussion of the need to renew STS began
- STS2 break-off group emerges and action committees are formed
- Agreement to use Open Space as a major design component
- Ecology of Work goes to Dublin and some Europeans are interested to learn about STSR

### **1997**

- Seattle
- Design is almost entirely open space which marks a shift from deliberations/coalitions model

### **1998**

- Frans and Lieke attend and introduce Multi-logue
- A multi-logue about environmental sustainability globally is discussed. This marks a push towards larger issues, such as the future of governance, sustainable organizations and sustainable society etc
- 1998 – 1999 design incorporates a mix of open space and pre-determined sessions to meet everyone's needs

- Bernard Mohr introduces Appreciative Inquiry and a world wide AI process is discussed

### 1999

- Monterrey
- Charlie Krone workshop – a review of the roots of the field
- Frans and Lieke attend and re-introduce Multi-logue
- Deliberation about the big 5 consulting firms growth in the marketplace with re-engineering etc.
- Consideration of people working together in the field is discussed
- Suggestion to bring other disciplines/fields into STSR
- Lou Davis memorial and review of his life work
- There have been many 2-3 year fads that STS has lived through. STS survives them all
- Experimental approach has a direct link to practice
- Rich McDermott's work on white collar design and communities of practice
- Kim Fisher's work on virtual organizations
- Lot of exciting conceptual innovations emerging out of, in and through STSR. A lot have emerged that kind of are forgotten or get lost in politics
- Pre & post-conference workshops since 1994 enrich and diversify our dialogue and our practice
- The level of relationships established has perhaps been grandiose and opportunistic rather than joint and mutual responsibility for development of the field
- Still need to discuss relation of STS to TQM, BPR, Chaos, Large group methods etc.
- What is the meaning for us of the passing of our STS parents, various memorials each year at STSR
- Old timers and pure STS practitioners no longer attend annual meetings
- Dick Ault is writing a novel and other old-timers are writing new works
- STSR is no longer in balance as in the beginning but is composed mostly of practicing consultants with different techniques and methods over which there is competition. A shared value base continues to hold the community together.
- STSR motto --- "Think big --- do nothing"
- 1999 the question was clear. Do we split up or create something new or do we carry on?

### 3. History & Heritage and Current Realities Chart

Year	Location	Concept	Design	Attendance	Relations
1986	Detroit	DEC/SME	Presentation/Discussion	Approximately 25	By invitation
1987	Dearborn	DEC/SME	Presentation/Discussion	25	Do it and write about it
1988	DEC, Enfield	DEC/SME	Presentation/Discussion	25	
1989	Toronto	DEC/SME	Presentation/Discussion	25	
1990	Boston		Mostly a transition meeting – how to carry on?		Mbshp on recommendation of 2 sponsors
1991	San Francisco	Future Search	Future Search		
1992	Boulder		Deliberation/Coalition		
1993	University of New Hampshire		Deliberation/Coalition		Formally hire Conference Systems (Tom Chase)
1994	Banff		Presentation/Deliberation/Coalition pre + post-conference workshops Readings		
1995	Charleston		Presentation/Deliberation/Coalition pre + post-conference workshops Reading		
1996	Santa Fe		Presentation/Deliberation/Coalition pre + post-conference workshops Reading		
1997	Seattle		Presentation/Open Space pre + post- conference workshops Reading	62	
1998	Ottawa		Presentation/Open Space pre + post- conference workshops Reading		
1999	Monterrey		Presentation/Open Space pre + post- conference workshops Reading		
2000	Salem, MA	Review & Planning Meeting	Presentation/Dialgoue/Review & Planning to Change/Pre-Conference Workshop	27	

### 4. Key Developments in the Field

#### 4.1. Group 1

- Conversation/Dialogue - how creativity is unleashed or inhibited by how we talk
- Knowledge Management
  - transfer
  - codification
  - creation
  - (how it grows, vs. being lost)
- Appreciative Inquiry (big time)
- Leadership Coaching (coaching leaders to be effective)
  - scatter bag of approaches
  - leadership as inner-driven: values, principles

- Business Systems Redesign
  - b 2 b
  - b 2 c
  - peer 2 peer
- Project Management
- Multi-kind of Matrix Structures
- Horizontal Design --DP3? (Design Principle 1 - Work is controlled from one level above. (Design Principle 2 - Work is controlled by the people doing the work.
- Multiple Organization Designs in the same company. (transaction selling AND relationship selling)
- Balanced Scorecard / Performance Management
- The Accountability Dilemma (connected with strategy maps)
- Our work is becoming a lot more event-driven (2 days here, 2 days there) and cycle-time compressed.
- ERP Implementation (everywhere) de-skilling
- Everyone wants "it" packaged in the FAST COMPANY format
- Internet-based expertise
- Expectation of new design principles for Dot-Com's
- Virtual Teams -- distance management
- High-Performance Team Management, including how to integrate them
- Labour-Management Partnerships
- Mergers/Acquisitions Management
- Attraction/recruitment of individual talent
- More selective (and more frequent?) us of Large Group Methodologies in less "pure" form

#### **4.2. Group 2 (Items with \* below represent perceived OPPORTUNITIES)**

- Globalization
- \*Acquisitions/Mergers
- \*ERP & fallout
- \*Virtual teams (round-the-clock/round-the-world work, 24-7)
- \*(a recognized need for) Increased Change Management
- Outsourcing
- Temporary Work(ers)
- Decreased slack time
- \*Inter-prise (supply chains)
- Decreased global environment
- \*Internet
- \*e-Business
- Increased concentration of wealth and income (+ disparity between have'/have-not's)
- 2-class country, 2-class world
- \*Gen-X
- \*Learning Communities
- \*Speed
- Increased speculation
- \*TQM, process redesign plus! work system design
- Larger consulting firms getting contracts, monopolization
- what's our niche?
- \*Increased use of Large-scale (Large Group) processes, faster designs
- \*Teams have not died
- Evolution of information communication
- \*Increased knowledge work (& knowledge work opportunities)
- \*Challenge: Diffuse innovation, especially globally
- "unbridled" capitalism - no competitor
- Belief that "profit is moral and the Market is the best way to redistribute resources"
- \*Emergence of Chief Learning Officers and Chief Knowledge Officers
- \*Breadth of simultaneous change in organizations
- Border on media monopoly

- OPPORTUNITIES (Items with \* above represent perceived OPPORTUNITIES)
- Fast large-scale change
- Involve people in creation and implementation of change
- Ecologically regeneration

#### 4.3. Group 3

- (*italics* = added comments)
- Ecological paradigm *health org., sustainability, Natural Step (see Paul Hawken)*
- OST
- Senge *et al.*, Learning Organization
- Quality - Six Sigma
- Agility in manufacturing *lean manufacturing, innovation*
- "Best Practices"
- Open Book Management
- Chaos Theory
- Dialogue
- Knowledge Management *dominant force - engineering*
- Facilitation/Coaching/Performance Management
- Appreciative Inquiry
- Computer-assisted Facilitation and Groupware/community
- Scenario Development, scenario-based planning
- Union involvement in work redesign
- e-mail - information glut and work glut
- "Computer mediated communication" Cluetrain Manifesto
- Networked organizations (see computers, too)
- Emergence of governance issues (see Ecological)

## 5. History & Heritage Analysis

### 5.1. Keep

- In touch with our Saints – e.g. Lyman Ketchum
- Mix of 1-on-1 time and large group time
- Pre-set agenda and open space additions
- Core values of participative democracy
- Innovative contributions to each conference
- Maintain attention to continuing to evolve our own design for STSR
- Attention to process in each meeting
- Rotating physical sites and location
- Design team concept as rotating Board of Directors
- Pre and post-conference workshops
- Connection to the work
- Focus on specific topics and presentations
- Keep the listserv
- Sense of humor and capacity to ridicule ourselves
- Colorado regionalized STSR
- Interpersonal sense of safety, trust and friendship

### 5.2. Discard

- Lingering remnants of elitism
  - In practice – elite design teams
  - In STSR – be careful about new members being only STS elites
- Current length of STSR meetings
- Fixation on October
- Feeling that STSR begins and ends once a year
- Founding story
- Naval gazing

- Poor follow through

**5.3. Create**

- More attention to core values both in the field and in STSR
- Invitations going out more broadly around the world
- Specifically identify target persons and organizations
- A meeting in Mexico and focus on the good work going on there both academic and managerial practice
- Internationalize where we go for meetings and more site visits
- West coast conference allows Asian participation
- Get other opinions of the Roundtable
- Be more explicit about the responsibilities of the design team (e.g. Board of Directors)
- Create new an more acceptable networking & client meetings arranged more creatively around STSR meetings
- Discuss where is the “P” (people) in our work
- AMOD conference bringing USC research on e-commerce. Bring cutting edge research to our forum.
- Create ongoing sense of STSR as community – the listserv is not “it.”
- How can we hear more from our members about what they are into?
- Acknowledge or decide that part of our mission is re-seeding the field and bringing new professionals into the field
- Include graduate students in membership and in annual meetings
- Attach STSR meetings to other big networking events to make it more worthwhile for travel
- Connection to the “new” work (SAP, ERP, virtual teams) with concrete case examples
- Individual commitment to recruit participants
- More research and dissemination as a foil to mindless fads.
- Look for people that adhere to values vs. theory and method.
- Develop more clarity on values. Create something each meeting
- Balance membership and participation mix at each meeting (age, gender, ethnicity, management, labor, academic etc.)
- Create new tools, knowledge, and dissemination. STSR is inquiry based.
- A new founding story. Assign a specific task to flesh out the founding story and then to determine to keep, modify or discard it.
- More regionalized STSR clusters like Colorado
- More organization sponsored STSR meetings (like DEC in the beginning?)
- More joint initiatives like Academy of Management
- Decide who our client is --- who we are here to serve
- Make ongoing scanning explicit in each meeting and bringing in the nutrients – leading parts—to each meeting
- Use STS framework to relate to new developments. Core framework does not need to change
- Relate to other mechanisms of connection like Ecology of Work Conference
- Original STS was contextual and linked to the environment. The environment has changed and so STS needs to be re-conceptualized.

**6. Strategic Themes or Intent**

The rationalization of conflict (Emery M, 1999) was utilized to integrate and theme the small group analyses of the Keep, Discard and Create brainstorm. Over break, these themes were cut and pasted to produce 4 Bright Ideas Groups that then met to write a strategic intent statement that captured their negotiated and integrated theme and to discuss bright ideas about transformation related to that theme.

Each group report is captured below.

**6.1. Governance**

This Roundtable intends to establish a governance structure which reflects participative democratic values, clarifies decision-making responsibilities, and enables the work of the Roundtable.

	Design Team	Membership	Coordinator
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		-Full -Silent	
Responsibilities	-Pro tem stewardship -Designs annual meeting (incl. venue) -Decides what extraordinary decisions are made by whom (members, coordinator, design team) Determines annual budget & oversees admin of budget (Check at AGM) -decide on program expertise to inform meeting design	-Make decisions on matters referred by design team, including any significant proposed changes to membership and meeting fees	-Participates as Design team member -manages membership renewal/meeting registration -Administers budget with fiduciary responsibilities
Form	-Board of Directors Pro-Tem -some overlap of composition over two years	-Full (voting) -Silent (Associate – includes emeritus) -Attending AGM	Voluntary and paid work

#### 6.1.1. Selection of Design Team

Numbers: Coordinator plus 4-6 members at large, including one from immediate previous design team

Expertises/Criteria:

1. mix of roundtable experience
2. attended at least one of two previous meetings
3. not been design team member for at least three years
4. locale of next meeting
5. membership -i.e., a mix of role, gender, nationality
6. meeting design, i.e., in designing learning events and activities

Process of Selection:

- need to be identified at least 18 months in advance of their meeting
- Option A – at annual meeting by self-selection and/or nomination
- Option B – outgoing design team selects from volunteers/nominees based on expression of interest
- Option C – by random selection from full members (either all those who indicate availability OR all members unless indicate unavailability)

#### 6.1.2. Feedback

Are these “criteria”, Requirements or Guidelines?

- Suggest that not having been a design team member be limited to a period of at least two years (vs. three years)

Which design team serves as Pro-tem Board of Directors?

Can there be multiple selection processes?

Roundtable website links

Design Team – rationale/report back to Roundtable 2001 (on response to Bright Ideas)

## **6.2. MEETINGS GROUP**

### **6.2.1. Strategic Intent**

- To articulate guidelines for creating meetings which attract significant groups of people to examine challenging content in energizing ways.

### **6.2.2. Assumptions**

- People come to participate (a content issue).
- People come to learn.
- People come to engage (an interpersonal and content issue).
- People come to contribute.

### **6.2.3. Minimum Critical Specifications**

- Provide an opportunity to learn and be challenged by new, emerging and different thinking, practice, and ideas (as well as founding practice).
- Provide the full opportunity to participate in the process in some meaningful way.
- Create a stimulating, enriching environment for the meeting (internal and external).
- Structure the opportunity for people to participate in self-governance of the Roundtable.

### **6.2.4. Bright Ideas**

- Invite/attract researchers and leaders in fields related to ours.
- Create continuity through ongoing activities (e.g., projects, research, etc.) that builds interest between members.
- Find ways to discover the best of current member practice and showcase it (within the meeting such as part of the introduction, on-line, etc.).
- Thumbnails of new books, individual best practices.
- Conduct environmental scan (pre-meeting assignment?).
- Illuminate new concepts and practice using STS frameworks (Can we understand 'it' in terms of our framework, or do we need to adjust the framework? Can we articulate how we would do 'X' [for example: ERP implementation] to make it work better? Can we develop models to work with ".com" start-ups?)
- Provide inputs that support our competence in working with the people aspects (with respect to both design and the process of change) of our client systems (This requires knowledge and competence about ourselves!).
- Provide for physical activity.
- Link the Roundtable meeting to opportunities for learning in local areas
  - both in content and focus
  - links to Roundtable Program itself
    - site visits
    - People in the area
    - Facilities in the area
  - Site Selection based on local resources.
- Develop content around current issues/dilemmas for members and/or their clients
- Live case study
  - Goal – joint learning; case is in process or in prospect; answers not required and questions compulsory!
- Block in 'open space' – institutionalize a space for spontaneity

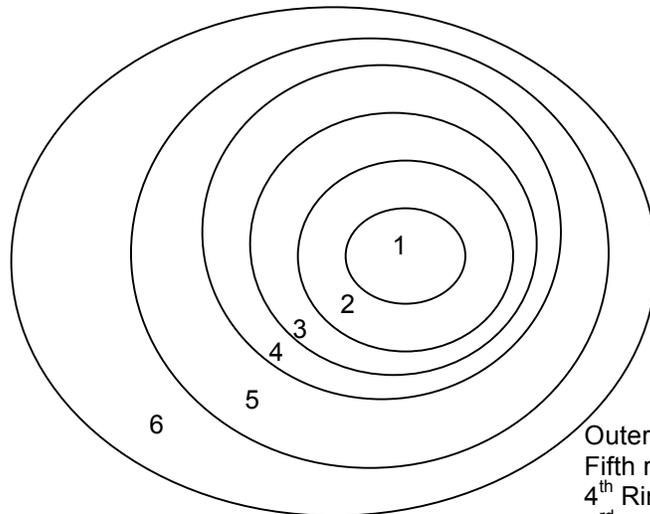
### **6.2.5. Resource Needs**

- Mechanism and mechanism for 'capture'
- Mechanism for exploiting local resources
  - connections (brokers)
  - seed money
- Appropriate design team process

- Time at end of current meeting to ‘mine’ themes for next meeting
- Fee waivers for design team
- Fee structure
- Virtual Communication
- Sponsoring organization (?)
- Technological Support
  - videoconferencing
  - Webcam
  - A/V equipment
  - LCD projector

**6.3. WHAT ELSE GROUP**

- outer ring
- expendable
- History & data today
- We serve us (spiritual monks fire)
- Reach out individually, informally, not as organization
- If you DO want a “what else” component, here’s what it might look like”
- 



Outer ring: Serve Others  
 Fifth ring: Program  
 4<sup>th</sup> Ring: Social  
 3<sup>rd</sup> Ring: Membership  
 2<sup>nd</sup> Ring: Values  
 Center Ring: Governance

We Go There	Knowledge Base	They Come Here
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- #3. Conference Outreach
- #1. Knowledge Database
- #2. STS scholarships
- #4. Revitalize union participation

### 6.3.1. Build STS Knowledge Base

- Coordinator: Phil Noble
- Help From: Saul Eisen
- Timing: report out in 3 months
- Hardware/Software: pursue pro bono
- Possible Content:
  - articles, papers, etc., history, values
  - conference outreach
  - chat room
  - online conferences
  - contact list/resource base
  - hyperlinks
  - STS sounding board open to all people in field
  - research – in the field, market research for STS (competitive analysis), best practices toolbox
- C/B: C= 1-4 hours/month/member
- B= potentially great

### 6.3.2. STS Scholarships:

- Who coordinates: 2001 design team
- Helps:
- Timing: 2001 STS-R
- What:
  - Identify 6-8 graduate students studying STS to attend conference at no fee
  - target local schools, not limited to local area, however
  - will then be invited to be an ongoing part of STS-R

Cost/Benefit: Cost = fees \$2000 (\$10,000 Cdn \$20,000 Aus!)

Benefit: Seeding the field, challenge our thinking, Gen X/Y perspective

### 6.3.3. Conference Outreach:

- Coordinator – Phil (part of knowledge database)
- Help:
- Timing: Immediately
- Purpose: seed STS thinking both formally (when invited) and informally via conversation, STS social room, etc. (discussion group); bring back people and ideas to STS-R; who does STS-R align with/compete with
- Criteria: STS-R members are going; known/potential STS practitioners attend

Cost/Benefit: Cost = room and wime (if done), time for info into database

Benefit = new members/ideas/momentum

### 6.3.4. Revitalize Labor Connection:

Coordinator: Nina? Doug? Nancy Mills? Max Ogden?

Help:

Timing: Participation at 2001 STS-R

What: Professional and Industrial Unions; Union Scholarships?

- participation and ongoing support within unions; build next generation of union understanding
- geared toward senior leadership in unions who can contribute and take back for action

Cost/Benefit: Cost = time to coordinate

Benefit = seeding ingoing union support; broadening perspectives

## 6.4. CORE VALUES

State Our Intent:

By clarifying, articulating, and using our core values, we:

- clarify our identity
- inform people about our work
- distinguish ourselves from the general field of consultants
- renew and revitalize ourselves
- attract like-minded people
- enable congruity in our work
- provide a basis for assessing our work

### 6.4.1. Sources we can look to for values

- Trist principles
- Cherno design principles
- Emery Criteria / content of quality job
- Update or start over for modern world:
  - McDermott's knowledge work design principles
  - STS II Values take force
  - Emery Ideals ... Eli Berniker
  - Emery and Trist – the causal texture of organizational environments
  - The Roundtable history (Jane will do)
  - the Seattle Values (in Harvey's notes)

### 6.4.2. What level(s), scope(s) are we at?

VALUES? ASSUMPTIONS? PRINCIPLES?

Examples:

<u>Value</u>	<u>Possible Assumptions</u>	<u>Possible Principle</u>
Participation	Participative org's are more effective & better places to work.	Make design a participative process.
Democracy	1. Democracy can & should be democratic or 2. Organizations cannot be democratic in a capitalist society.	1. Design organizations to be democratic so far as possible or 2. Forget democracy; design for participation.

### 6.4.3. Recommendations to Design Committee VALUE

- Some orientation to STS – principles/values (metaphor, method, role change agent, deal conditions, principles)
- Or pre-conference reading – use as marketing material (Nancy Cebula – Demo Federal justice video, Team Based Mgr, participative design Seattle, Journal Quality and Participation, People in Charge – redesign federal court)
- When a new case or method is presented, one question we dialogue around is how does this compare to our values or where was I able to adhere to values, or where did I compromise.
- Comparative analysis [En crypt ion] definition turbulence as the com. environment
- Readings post conference – Trist pamphlet

#### **6.4.4. Salem Values – Add-Ons**

- As we bring in examples of our work, case studies, reflect on: which of my/our values have been applied and reinforced? which of my/our values have not worked, or not been applied, or are at risk in this case? and why?
- Evolution at work here – values from our founders and history and newer assessments and developments
- Values be articulated and used as a lens as we do our work
- Appreciation of value conflicts as inevitable in our work

#### **6.4.5. Social Connection**

Preserve and enhance those qualities that enable social connections, which support connections that support networking, friendships, personal growth and fun in a learning community.

#### **6.4.6. New Task**

- Design a process whereby the members of the STS Roundtable can be involved in finalizing a set of values that under gird STS and ...

We, It (STS?), (STS 2001?) are/is about work, people at work, satisfying work, interdependent work, organizations (of some kind) interacting with their environments.

#### **6.4.7. Membership**

The conclusions on values and identity should shape our approach to membership.

- We want us more multicultural
- we want to include novices, but not too many at once

## **7. Summary & Conclusion**

Overall, members present felt this was a good start, a good reflection and something that we needed to do more of. In our rush to meet the challenges of an ever changing environment and an ever-changing field of practice we seldom take the time to properly analyze where we have been and where we want to go. In general there was a sense that this approach was right for STSR and that a more fundamental transformational approach may be interest in the future.