

STS Roundtable Conference Learning Summary

September 28 – October 1, 2011 - New Orleans, Louisiana

EXPLORING SOCIAL AND TECHNOLOGY FRONTIERS: SOCIAL MEDIA AND SELF ORGANIZING SYSTEMS

- I. **Description of the Conference Sections** (each team member can amend the description as he/she sees fit and I will “mashup” into one descriptive paragraph)

Our Conference Design Team this year – Kathy Buechel, Sharon Shoemaker and Mary Winby did a fantastic job of putting the “jazz” into this session.

The session started on Wednesday with a presentation by Ken Shepard, the founding president of the Global Organization Design Society. Ken’s topic was “*STS & Requisite Organization: Oil and Water or Potential Synergies?*” Ken presented an overview of Requisite Organization theory, assumptions, principles, values and application over the past 20 years. We enjoyed a lively dialogue on potential synergies with STS.

Another exciting pre-conference event was sharing our STS expertise with Elizabeth Shephard, Founder and Chief Sustainability Officer of **Life City**, a social enterprise focused on the greening of New Orleans. Liz, a young and dynamic entrepreneur, tested our ability to use STS to help her improve her strategy and organization design.

Thursday was a day devoted to the rich R&D work being done by the Roundtable through its Discovery and VOSS teams. This was an opportunity for all Roundtable members to learn about the work and participate in its further iteration.

The **DISCOVERY TEAM**, a subset of which created the presentation for New Orleans, included Doug Austrom, Don DeGuerre, Bob Laliberte (not in NOLA), Helen Maupin, Bernard Mohr and Carolyn Ordowich. They presented on **new STS design for emergent forms of organizing the adaptive enterprise in the 21st century**. All participants engaged in understanding how STS design principles, processes and values change to reflect the current realities of the more adaptive, agile organization strategies, structures and processes. The work was validated by the community and the team received great feedback to further the development of the STS approach.

The **VOSS TEAM**, whose members are Doug Austrom, Betty Barrett, Betsy Merck, Bert Painter, Pam Posey, Ron Purser (not in NOLA), and Ram Tenkasi (not in NOLA), presented their research on **Virtuality and Deliberations in R&D-type work**. The community was excited by the potential of this research not only in its own right, but also to further the Discovery Team work above.

We all enjoyed a wonderful “Louisiana dinner – gumbo and all” Thursday evening that reconnected participants from the USA, Canada, Israel, Norway, U.K. and Netherlands. It was wonderful to see that although we work in different geographies, we are encountering many of the same challenges

and sharing our insights about the path forward. Many enjoyed the New Orleans jazz music late into the night.

Friday was a day devoted to case studies and applying the learning from Thursday to better understand how the concepts come to life. We started with Stu Winby's presentation on **Designing Adaptive Organization and Work Systems**, a case example of self-organization in healthcare. Stu's breakthrough integrated STS model has resulted in outstanding results and all participants were eager to learn more about how to apply his approach. The next case study by Betsy Merck and Carolyn Ordowich was about the **transformation of a national nuclear facility** demonstrating the three emergent forms of organizing as a mapping tool as well as a way to strategize with the client. Following was a case study by Kathy Buechel, IT Director at **CenturyLink** who described how a self-directed team can influence corporate culture, organizational efficacy and employee engagement. Kathy really opened our eyes regarding how social media is impacting work design. Finally we heard from Kevin Boyle and Wim Sprenger about how US and European unions and social movement organizations are representing the voice of workers in a global environment where labor's influence continues to diminish and how STS could have an evolving influence on the future of work.

The STSRT held its annual business meeting and elected a new slate of stewards to join Antonio Sama who has another year left to serve. Kevin Boyle was re-elected and three new stewards were added - Doug Austrom, Ray Dyck and Carolyn Ordowich – for two year terms.

Saturday was more time for reflection on the impact of social media presented by Kathy Buechel. Kathy reported on the Bradwell & Reeves study called Network Citizens: Power and Responsibility at Work that was very informative (See link: <http://www.demos.co.uk/files/Network%20citizens%20-%20web.pdf?1240939425>).

- II. **Participants' Learning** (I encourage all team members to add their own personal insights because this section is what gives richness to the learning journal. Once other participants see our comments, hopefully they will want to contribute their own views and we can enable a rich exchange. Eli and Stu please feel free to add to your initial comments.

ELI BERNIKER: I came out of NOLA blessed with ideas, concepts, and a path towards mapping a future framework for our work. Taken together, and as an integrated event, the power of what was presented at the meeting was enormous. For me, the high points includes Betsy and Carolyn's case presentation because they applied the metaphorical framework developed by the Discovery Team to make sense of an inordinately complex phenomenon dealing with the technological issues of a sustainable environment. That is a world class challenge and they produced a leading edge. Wow!!! We, really they, have joined a very elite league. Beyond that, Kathy's social networking case was magical. To understand it fully will take much time. Metaphorically, Kathy gave us a window on the knowledge work "coal mine." This is a naturally occurring self-organizing network of ephemeral, temporary, richly collaborative knowledge work teams who drove down the "coal getting cycle" to 90 days while those at the other "mine faces" cannot make it in 18 months or so. This was not done

in the "Noosphere" but within a very real defined organization. Kathy presented us with a fleshed out example of what Christensen would define as a "disruptive innovation," a game changer.

Since Stu (Winby) started us on this path of "product cycle" evolution years ago through the evolutions created by the Discovery Team, we have been engaged in "sustaining innovations." Stu's presentation and the Discovery Team presentation are excellent examples. Kathy's case is a magical moment when we are witness to a disruptive innovation at birth. (Reference Wikipedia for Disruptive & Sustaining Innovations definition, .e.g. automobile was a sustaining innovation whereas the *mass-produced* automobile was a disruptive innovation to the transportation market). We could not ask for a more relevant and fruitful moment. After all, the heart and soul of STS has always been participation and self-organization. We have never seen so powerful a demonstration of our principles and values. There is work to do to penetrate these learnings and frame them for our future work. I come out of NOLA elated.

STU WINBY: I felt the other presentations and parts of the agenda were excellent and very helpful. Given that, I plan to have a few deep dives during the year to further develop the theory and practice of the adaptive model. This would be a useful forum for continued action research. Last, the community has shifted to be future orientated, generative in nature, more optimistic, and more collaborative than ever. Sharon did a great job with the agenda, and the Discovery Team did some good work bringing the community along.

CAROLYN ORDOWICH: The STSRT has been for these past seven years in gestation mode and for me **STS3.0** was born in this session for the community as a whole. I truly felt for the first time all the presentations gelling into a new approach for STS that all those present could see how to use in their own way. We still have a lot of "integrating work" to do, but I left NOLA energized because I feel we are at the cusp of understanding the true value of STS in our networked world. In 2007, we saw that work has moved from "transactions" to "interactions". In 2010, we explored work interactions shifting from mostly *optimizing* work to *innovation* work. We learned that innovation work is primarily knowledge work, i.e. processing data into information and knowledge, but now done with a new 'technical system' using ubiquitous social technology (and blurring the lines between social and technical systems). Innovation work for the most part is characterized as helping to resolve equivocal topics (such as defining a "mystery or heuristic") and is carried out through a variety of interactions such as "encounters, exchanges and reflections that may end in decisions and actions". These interactions need "design" in order to be effective. The STS Deliberations Approach is a systemic process for designing these interactions that takes into account the behavioral, structural, and environmental elements to achieve productive outcomes for networks at all levels of social scale. Many other disciplines are offering highly participative approaches (e.g. community building, Liberating Structures, Dialogue, Story-telling, etc.) that could provide STS with good methodologies for the forums, but STS goes deeper than conversations by defining coalitions that I believe act in two dimensions – the first, as a temporary union between two or more disciplines/silos and the second, merging multiple entities into one body/network. The pattern of coalitions is the new organization. The coalitions link strategic topics with a variety of operational forums and with appropriate nodes/roles in networks that enables people to hold to

their values while exploring and imagining new possibilities and building the ongoing deliberative community that is high performing.

BERT PAINTER: The New Orleans Roundtable was a unique opportunity to look into the future of work organization through some powerful present-day examples viewed through the lens of a renewed STS conceptual framework developed by the Roundtable's own Discovery Team. The 'what' and 'how' of design and production being integrated within adaptive work systems was vividly illustrated in two very different rapid iteration and participative processes, one being the strategic intervention facilitated by Stu Winby in health care reform within a large US health care provider system, and the other case being a report from Kathy Buechel about a spontaneous and quite extraordinary employee use of web conference technology to self-organize for highly successful product development in the wireless mobile industry. We also learned from Betsy Merck and Carolyn Ordowich about how another dimension of our 'adaptive enterprise model', the 3-system levels, was used to support a transformational organization design proposal developed by personnel at a nuclear waste treatment site, with networks of public and private sector stakeholders concerned about the future of environmental protection, national security and clean energy. In all of these cases, both the innovation and the 'production' of the organization have primarily involved knowledge work, done in STS terms (Pava, 1983), through "a complex of interlocking deliberations". Many of these deliberations are increasingly conducted within virtual settings such as described by my VOSS team colleagues who shared our preliminary findings from a comparative study of geographically-dispersed R&D organizations. Here a new form of 'joint optimization' is apparent in the complementary forms of F2F and electronically-mediated communication that enable diverse perspectives and disciplines of parties scattered around the continent and the world to resolve key questions or choices at various stages in their scientific research and product development. And finally, within this global context, Wim Sprenger and Kevin Boyle reminded us that STS theory and practice remains a search for humane as well as effective work organization, through their accounts of efforts in Europe and the Americas to provide voice and representation to the rapidly growing contingent workforce, knowledge workers and farm workers alike. It was truly exciting to see each of these presentations to the Roundtable bring alive through practical experience a distinct dimension of our updated STS perspective of organizations as 'open, purposeful, joint socio-technical systems' in the 21st century.