

## <sup>1</sup> “You had to be there...”

It's seldom possible to capture the spirit of a Roundtable gathering in a few words. But that doesn't stop us from trying. Some of our friends and colleagues sent their reflections after the Scottsdale meeting.

**Neil Watson** wrote from Australia:

*From Pam's welcoming face at the entrance to the Baggage Claim at Phoenix airport, to Pete and Karolyn Sorenson at lunch the next day, to Stu, Ray, Eli and others in the bar Wednesday night, the spirit of warmth and friendship is the first and the abiding impression of what the Roundtable means to me.*

*These renewed connections are always such fun! Fun ripples through everything, formal and informal. The wit sizzles even as we are grappling with serious issues and concepts like 'intangible assets'. I realize that I am as happy or more so at these meetings as I ever am at any other time of the year. And generous. Everyone is so generous with their ideas and their experience. Things are given away care-lessly and caringly; like Kimball and Maureen's donation of what will become our new intranet facility.*

*Care abounds. We re-discover as we meet together that what binds us is how much we care about work and the people who do it. And we care about each other as we struggle with the work. Struggle with life's hurts, like George's. What happens to each of us matters and we want to be there for each other.*

*And this helps us to stay tenacious about the work on work. It is often hard to find or hard to do or hard to sustain. But, though sometimes tempted, we find we will not give up. On the work, on the Roundtable, in the end, on each other. So we met and will continue to meet. But in new ways and perhaps places.*

**Saul Eisen** said:

*For me, this group provides a context for thinking big about our selves and our world. Together we can re-seed the professional ecology of thinking and practice that supports sane and effective organizations and communities. In the Roundtable we can learn from each other, and discover what we each can contribute to this crucial journey.*

From **Bruce Hamilton**:

*The October 2004 Roundtable meeting was my first. I didn't really know what to expect, and had a little difficulty explaining to my wife why I needed to escape from the early winter temperatures of Montréal to spend 3 days in sunny Phoenix. In short it was a wonderful experience from all points of view: the rich and highly diverse nature of the membership; the uncommon blend of ideas and action; the opportunity to participate in a most lively renewal process.*

*Thanks.*

**Eli Berniker** reflects:

*The roundtable is the place where we can all discover what we do not know and what others contribute to our understanding. None of us have to "preach to the choir" and we are not in "sales mode." I have learned how little I know about organization design and how much more remains to be learned.*

**Dick Ault** replies:

*Our October meeting showed once again that this continues to be a one-of-a-kind organization. There are many other networks and professional associations but none with the same strong and ongoing sense of community and none with such a demanding intellectual spirit of inquiry combined with a genuine openness to new ideas and to each other. And once again our actions demonstrated our democratic values. That is such a compelling value proposition that surely now, rather than longing for the past, we can envision our "golden days" in the future.*

**George Gates** tells us:

*I came looking, at a low point in my life, for a reason to continue the work I've done for twenty-five years. I found it again in the encouragement and support and stimulation that always happen with this group. It's great to belong to a community with such a history and, yes, such a future.*

Finally, **Pete Sorenson**, noted this deep personal impact:

*The STS RT meeting has been a blessing in my life this year. It always is. I come to the Roundtable differently than I go to any other conference. I come to be fed and to give intellectually and spiritually and to renew my heart and soul through my friendships with the members of the Roundtable. A big part of that benefit derives from the fact that I can give as well as receive at the meeting. This exchange is energizing!*

*I go to other conferences to meet potential clients, give presentations, and broaden contacts for business purposes. Other conferences do not offer me the deep stimulation and renewal the Roundtable offers. They lack deep intellectual and relationship-based exchange.*

**Detail of the meeting process we followed is available from the Stewardship Team, as is a summary of our discussions of our Vision of the Future Roundtable and our view of our Value Proposition.**

## <sup>2</sup> What We're About

### **Purpose**

We are an open learning community advancing the values, theory and practice that create healthy and powerful human work systems that are demonstrably capable and responsible.

This learning community continually devotes time and energy to advance the connections between the principles of democracy and the social and economic objectives of organizations.

The central purpose of our research, learning and practice is to create better places to work and places that work better.

### **Mission**

The [New Work Roundtable] is a global organization that builds on and expands the rich forty-year treasure trove of socio-technical systems (STS) principles and methods to create workplaces that are both productive and life-enhancing.

We face opportunities and challenges that demand renewed effort and new alliances across the globe that include:

- diminishing conditions of employment in many workplaces in the west;
- the rapid growth of multi-enterprise 'horizontal' organizations;
- the creation of bureaucratic and fractionated workplaces in the developing world;
- the dilemmas posed by wide and varied cultural differences organizations;
- the need for long-term sustainability in the ways workplaces use their physical and human resources;
- the speed of change in information and communications technology and its impact on work; and
- the requirement for more responsive and responsible corporate governance.

In response to these demands, the members of the [ \_\_\_\_\_ Roundtable] are committed to:

- creating and maintaining high quality working lives in workplaces everywhere in the world;
- developing productive workplaces that treat all the resources within their stewardship as irreplaceable;
- providing innovative solutions to enterprise problems through the application of inquiry and action research;
- sharing knowledge and fostering learning with clients and each other;
- supporting each other and maintaining a spirit of community within the Roundtable across the globe.

### <sup>3</sup> Our New Look

Finally, we're organizing ourselves. We'll have some leadership—which we've chosen to call a Stewardship Team. We'll establish ourselves legally so we can seek funding, employ responsibly and be accountable. It will either kick us into a new era or prove to be a last desperate attempt to stave off the inevitable, and only time will tell. Time, and our wit and energy and enthusiasm.

If we get it right over these next five years or so, The Roundtable will change dramatically. We'll discover that we are no longer just a North American network but a global movement. We'll participate in our annual meetings and maintain contact because we are devoted to life-enhancing, sustainable workplaces—not just because we enjoy the self-enhancement and mutual support. To help that happen, we are establishing a more permanent structure and defined roles.

Our **Stewardship Team** will be responsible during this start-up phase (1-2 years) for administration, member recruitment and service, marketing and alliance-building, products and services, and finance. The Stewards will also oversee the operation and, where necessary, integration of sub-groups, and will establish our web facility—including the creation of our website for out-reach. Finally, they will be responsible for the process that develops our Strategic Plan, and for drafting budgets.

The inaugural Stewardship Team will be Pam Posey, Betsy Merck, Doug Gamble and Neil Watson. (Dick Ault, originally selected, has declined due to other commitments.)

To meet legal requirements, the Stewards will establish the appropriate not-for-profit legal form and choose a required President and Treasurer. This will also entail drafting by-laws and a constitution, which will be referred to the membership for endorsement before proceeding to complete the legal process.

**Sub-groupings** of the Roundtable (coalitions, Communities of Practice, etc) can be initiated 'organically' by members around their interests. Planning, Task and Design teams will be organized as necessary.

Initial support for these sub-groups will be provided as needed by these willing volunteers: Nina Gregg, George Gates, Jan Mears, Harvey Kolodny, Saul Eisen, Doug Austrom, Pete Sorenson, Adrienne Seal, Sylvia James, Jim Taylor, Eli Berniker, Barry Macy, Bruce Hamilton, Stu Winby, Ray Dyck and Preston Pond.

One such group will take responsibility for collecting **materials and resources** as a prelude to creating and publishing a Standard Reference Resource on STS/OST and related tools and techniques.

The Fisher Group has generously offered, gratis, a **web-intranet** facility, which we gratefully accepted. All members will be expected to join it and contribute to the deliberations, conversations and requests for assistance voiced through this facility (Bert Painter and Pam Posey will make this happen).

## **4 Joining and Expanding**

### ***Membership***

A crucial sign of renewed energy and direction will be a growing membership: an important challenge for us all to recruit new members. The Stewardship Team has already outlined ambitious goals for membership growth and diversity over the next year and beyond. We will achieve them if we are able to re-discover and infuse our work with the exciting spirit of inquiry so much a hallmark of our founders at Tavistock. We will meet them if we provide valuable and valued ideas, methodologies and tools for our members. If we don't, we won't survive—and probably shouldn't.

### ***Alliances***

We will thrive if we establish alliances with other groups in other parts of the world, as we now agree we want to do. We will now seek to build alliances in Europe and Australia and elsewhere. We will campaign and recruit. We will do action research in our work, reporting and considering it at our meetings, and we will stay in touch and support each other continually through our intranet. Within and between meetings, wherever in the world they are held, we will be available to help each other improve the global workplace.

Our challenges include maintaining and spreading the enthusiasm and the energy for this essential work. We aim to move from a relatively mono-cultural to a multi-cultural organization. We intend to foster a more focused spirit of inquiry embedding the notion of healthy and sustainable enterprise at our heart.

### ***Finances***

We will establish ourselves within the next six months as a 501(C)3 organization enabling a tax-free and tax deductible status. That will allow us to bid for grants and donations for projects as one source of revenue. However, our main source of revenue for the foreseeable future will be Membership Fees. As soon as possible we want to be in a position to pay a part-time administrator, cover administration and legal set-up expenses, and pay for website maintenance, etc.

We have agreed to increase our Annual Membership Fee to US\$150 (F/T Students \$25) once we have put in place the new infrastructure. The possibility of a corporate fee will be considered later. Meeting registration fees will be set to cover costs, on the order of \$275, with students charged at 2/3 of the full. Those costs will decrease as numbers attending rise.

We are also exploring the establishment of a Founding Member Fund to which individuals or sponsoring groups could donate at various levels to help create a solid financial base on which to build our new global organization.

## <sup>5</sup> Where We're Headed: Scottsdale Meeting Decisions

During and immediately following our October meeting we made the following decisions:

### **2005 Meetings**

The next two meetings will be during 2005 the first in May, the second in October. The first will be in Chicago. The meeting planning team will be Pam Posey, Jan Mears, Stu Winby, Doug Austrom and George Gates. The possibility of the 2006 meeting taking place either in Europe or Australia will be canvassed with the membership by the Stewardship Team.

The date of the first meeting in Chicago (venue being determined) will be one of April 28-30, May 5-7, or May 12-14.

### **Finances**

See Addendum 3. The Stewards have determined that the new fee structure will only be introduced after we have set up the new infrastructure – intranet, website, etc..

### **Possible New Name**

Twenty of us brainstormed possible new names and then two rounds of voting reduced these to the final choice – **Future Work Roundtable**. It was determined that the Stewards would investigate URL availability on all the names that made the second round of voting. This revealed that the above name was available. However, at this stage the Stewardship Team thinks it desirable to seek a new set of ideas from the wider membership and revisit the issue at the next meeting when we would check domain name availability in real time during our deliberation.

The brainstorm of possible names generated the following list. The votes represent the voting of the 20 people present each having six votes.

The New Work Place (18 votes)	Work Systems R/R (11)
The New Tavistock Group (4)	New Work Systems Design R/T (3)
The Whole Systems design R/T (6)	The Changing Work Place R/T (14)
The Roundtable (34)	The Future of Work R/T (12)
Sustainable Work R/T (9)	

In the second round of voting each of the 20 had two votes each with the following results.

The Roundtable (13)	Future Work Roundtable(14)
The New Work Place Roundtable(6)	Work systems Roundtable (1)
The Changing Work Place Roundtable(6)	

### ***Membership***

We will aim at increasing membership and its diversity. We ask you now to consider whether you wish to become part of this new era for the Roundtable. If not, please let Pam Posey [Roundtable@att.net](mailto:Roundtable@att.net) know and we will remove you from the list. If however, you are attracted to join this new direction then let us know, and keep the dates of the May Meeting clear so you can contribute directly.

If you are coming to the meetings next year please try to bring a colleague(s) and especially focus on inviting those who will expand the diversity of our membership.

### ***Intranet for peer learning and support***

The Stewards will arrange with the Fisher Group to have the intranet facility in place by the January, 2005 to enable us to communicate with ease. This will become the primary medium between meetings for members to seek support, offer ideas and receive feedback, and just stay in touch with what's going on.

### ***Website***

The establishment of a Roundtable website will take a little longer and is, of course, integrally connected to the issue of a new name. Our aim is to have this resolved at the May Meeting.

### ***Quarterly Newsletter***

We believe a growing and thriving organization should produce a regular on-line journal. This could include information on the Stewards' actions, the progress of working groups, summary of intranet debates, etc. We need someone to volunteer to be Editor.

### ***Publications and thought-provokers***

The Stewardship Team plans to invite members to prepare White Papers for presentation at the May or October meetings. Topics under consideration include: Organization Capabilities and STS; Boundarylessness and Social Ecology; Sustainability as a Central Concept in 21<sup>st</sup> Century Organization Design; and The Spirit of Inquiry.

In addition we aim to have a first draft of "Minimum Critical Specifications: The Thin Book of Open Socio-technical Systems" completed by May.

If you would like to become involved in any of the above, or you have other ideas you'd like to collaborate on, please contact us.

**Research and Education**

Stu Winby and Jim Taylor are working on a research agenda for consideration in May. They are pointing us toward discovering a 'new generation technology' which will address the problems customers have in the workplace and apply state-of-the-art management science. Contact Stu [[stu@winby.biz](mailto:stu@winby.biz)] to become more involved.

**Building Alliances**

Harvey Kolodny has identified an extensive preliminary list of potential allies with which we might seek to build collaborative relationships. They are:

- EGOS (European Group for Organization Studies)
- Academy of Management, particularly three divisions: Organization Development and Change, Management Education, Organization Management and Theory
- Organization Design Forum
- Organization Development Network
- European Continuous Improvement Network
- European Academy Network
- Scandinavian Management Network
- IRRRA (Industrial Relations Research Association)
- Armand Hatchuel's design network at Ecole des Mines

In addition, we would like to take advantage of the Chicago location for our next meeting to build alliances in that area such as Kellogg School at Northwestern University, the University of Chicago Business School, as well as other universities in the area; area business organizations; area union leadership, other area organizations. We envisage that we could invite members of potential partners to attend our meeting in some appropriate ways, even if just for receptions, etc. Please let us know if you have any contacts that would facilitate this outreach.

**Education Courses**

Eli Berniker prepared for the October meeting an overview of a wide range of STS Courses offered in the past. It is widely agreed that we need as a matter of urgency to create present day equivalents of what are fondly recalled as the "Lou Davis Short Courses". While nothing has yet been decided, discussions have canvassed on-line and workshop formats, as well as industry specific versions. We see the development of new educational activities as a key stimulus to the generation of new thinking as well as a major medium for outreach and recruitment. This will be a vital aspect of our new existence and we invite you to volunteer to become involved in design and/or delivery of the re-invented STS.

**Organization and Finance**

See Addendum 4 "Joining and Expanding"

**Coalitions, Communities of Practice, and the conduct of deliberations**

As noted in Addendum 3 "Our New Look," we encourage members to initiate temporary or semi-permanent sub-groupings around topics, areas of work, and/or issues of theory or practice. Once our intranet facility is established it can provide the communication medium for such groupings to maintain conversation, debate and deliberations.



## <sup>6</sup> How You Can Help: Action Checklist

You can immediately choose to participate in renewing our organization. Consider the following, and let us know your choices at [Roundtable@att.net](mailto:Roundtable@att.net)

1. Decide whether or not you want to continue your involvement and tell us.
2. Plan to come to the May and/or October meetings and invite a new potential member to come with you.
3. Let us know what you think of the list of possible names and offer any new ones you like.
4. Consider volunteering to be the Editor of our Quarterly Newsletter.
5. Suggest potential allies in or outside North America and/or in the Chicago area.
6. Volunteer to become involved in design and/or delivery of the re-invented STS.
7. Give us feedback on the idea of establishing a Founding Member Fund.
8. Initiate a sub-grouping to work on a topic, area of our work, or issue that needs addressing.