



READINGS IN GLOBAL ORGANIZATION DESIGN

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THE TALENT UPSHIFT

by Donald Fowke, FCMC with Bonnie Fowke, CMC

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The second trend is the sharp upward shift in cognitive potential of the Millennial generation who, as they mature, offer an unprecedented capability for managing complexity in implementation, change and innovation. This trend opens up opportunities for business strategies based squarely on talent strategies.

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The Talent Upshift

Donald V. Fowke FCMC
with Bonnie Fowke CMC*

April 2014

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Companies and governments that grasp these trends will have the ability to shape the future as never before.

These trends are supported by underlying patterns in demographics in most of the Western world, and also by improvements in 'smarts' described by the Flynn effect.

Let's look at these in turn.

Getting Older, and Getting Younger

In 2014 Western industrialized countries are younger than at any time in history, and will remain so through the middle of the century. This means we have a growing capacity to solve the big

problems and get things done.

But how can this be so when everywhere we look there is a wringing of hands about the baby boom generation retiring and relying on a smaller working age population to support them? Well, it's a matter of how you look at it. The average age of the population is rising, but remaining life expectancy is rising faster. It is expected that of the Millennial Generation, born in the last 30 years, half of them will live to see their 100th birthday.

So today's assumptions that people are old at 65, and should retire from making a useful contribution, and that they are of failing health and declining mental capacity, are simply wrong.

Jeroen Spijker and John MacInnes, using UK data, demonstrate in "Population ageing: the timebomb that isn't?"¹ that remaining life expectancy gives a whole new view of that growing segment of the population who are over 65. "From the late 1970s improvements in old age mortality have reversed the rise in the proportion of the population with low life expectancies."

They argue:

"Key messages

- The extent, speed, and effect of population ageing have

*Don and Bonnie Fowke are Management Consultants with the New Management Network in Toronto. Don is also Chairman of the Board of the Global Organization Design Society.

been exaggerated because ... [they] does not take account of falling mortality

- When measured using remaining life expectancy, old age dependency turns out to have fallen substantially in the UK and elsewhere over recent decades and is likely to stabilise in the UK close to its current level.”

And there is more, much more!

Let's look at elite leadership first.

Understanding Managerial Complexity

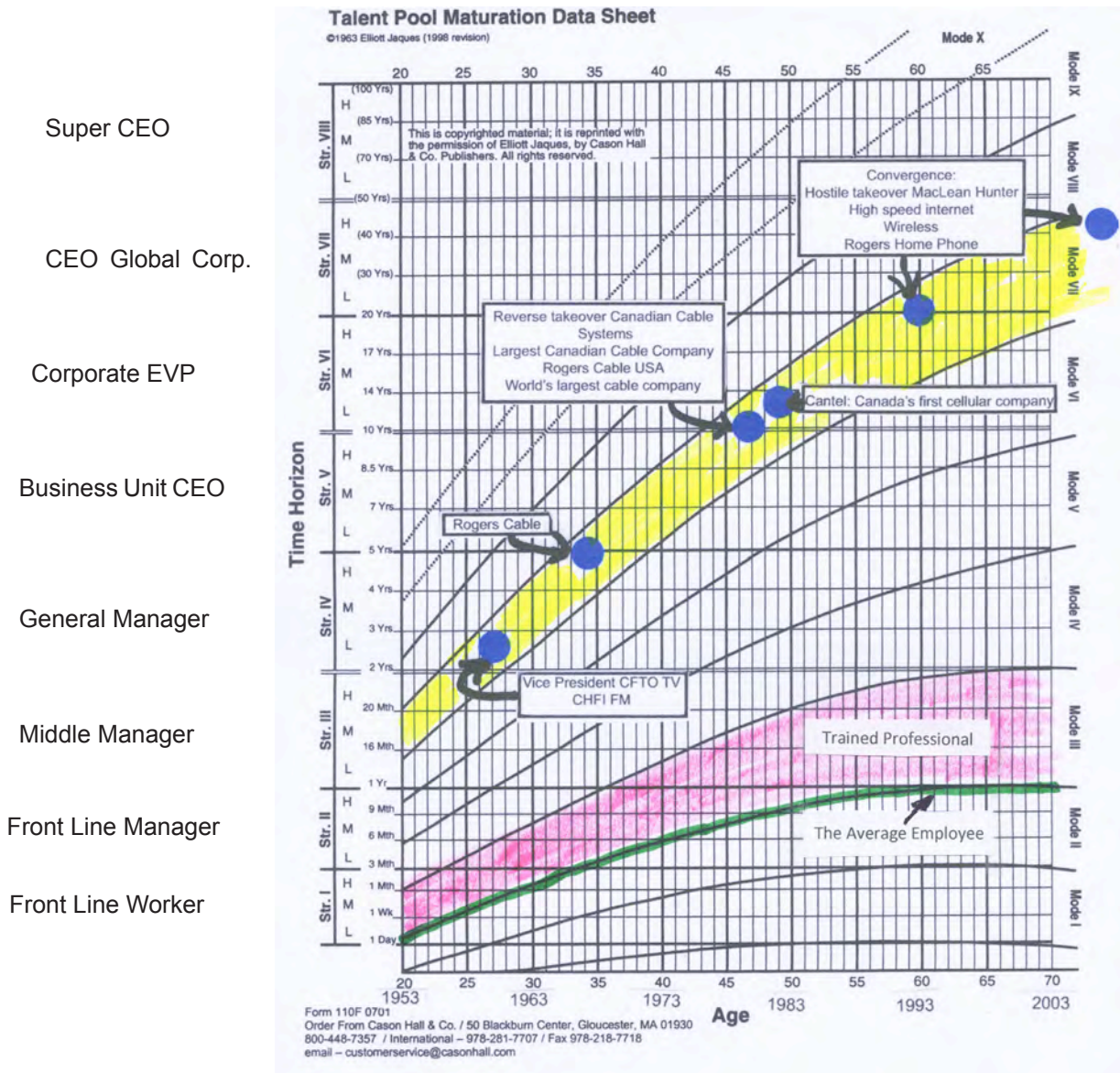
Elliott Jaques, writing in the 1970s, described a pattern of growth of capacity to handle managerial complexity. This pattern has come to be central to advanced Talent Management systems used by corporations to assess and plan their managerial leadership capacity and succession strategies². Subsequent research with the US Army and various industrial enterprises has articulated the science and methodology behind this approach³. The Jaques Talent Pool Maturation Data Sheet is shown in Exhibit 1, as applied to the career of the late Ted Rogers, a noted Canadian entrepreneur⁴.

There is a lot of information on Exhibit 1, and it is worth taking a few minutes to understand it. On the left hand side are “strata” or levels of complexity, from I to VIII in Roman numerals. The strata relate to levels of complexity in a managerial hierarchy, where a Front Line Manager at Stratum II can set context for, and effectively manage, front Line Workers at Stratum I, Stratum III Middle Managers can do so for

Front Line Managers at Stratum II, and so on up to Stratum VIII who are capable of handling the complexity of a global enterprise, like General Electric. Time Horizon is associated with each Stratum, and refers to the time frame within which the longest task in the role needs to be managed.

Almost everything in an organization goes on at Stratum III and below. Front Line Workers at Stratum I make decisions within prescribed procedures, dealing with one issue at a time. They have a time span of discretion, meaning the length of time they can independently handle the tasks in their jobs of up to three months. Front Line Managers at Stratum II solve problems comprising several variables together, and can therefore sort out problems for workers and have a time span of discretion of up to one year. Stratum III Middle managers can devise and manage several alternative serial paths to meeting objectives, and have a time span of discretion of up to two years. Stratum III managerial roles would include plant managers, engineering managers, controllers, sales managers and marketing directors. Senior professional work, including medical doctors, professional accountants and professional engineers is usually considered to be Stratum III work. Working with industrial situations in the middle of the 20th century, Jaques estimated that 10% of the population was capable at less than Stratum I, about 40% at Stratum I, 40% at Stratum II, and 7% at Stratum III. In other words, Jaques estimated that that almost 90% of the world's work was done at Stratum III or below.

Exhibit I: Ted Rogers and the Jaques Curves



Ted Rogers and the Developmental Path

Looking at Exhibit I, we see that Ted Rogers is shown at the bottom end of Stratum IV when he was 27 years or so old. Stratum IV is in managerial terms where general management takes place. Here coordination of multiple serial paths of sales, product development, production, safety and quality control is the essence of the work. Ted's role as Vice President CFTO TV and CHFI FM was of that quality, and he had this job at a relatively young age.

Which leads us to the curves on Exhibit I which rise upward and to right. These, according to Jaques extensive data, are the probable developmental paths that an individual would follow, if they got the necessary skilled knowledge and were motivated to do the work. The average employee in an organization might be capable at Mid Stratum I at age 27, lying on the green curve on Exhibit I. This average employee would likely be capable of Stratum II work in their early thirties, and with the necessary skilled knowledge and motivation be capable of Front Line Management throughout their career. A trained professional might start out working at Stratum II in their mid twenties and as they developed into a mature professional in their mid thirties finish out their career in Stratum III. We would call such a person a Mode III, referring to the right hand scale in Exhibit I, which means they would have a career path within the Mode III envelope that ends up defined by Stratum III at age 70.

Ted Rogers, by contrast, is clearly on a different trajectory, becoming CEO of Rogers Cable in his mid thirties, integrating multiple businesses in his late forties, and developing a portfolio of

complementary businesses in a complex industry late in life. Ted Rogers was what we call a Mode VII executive.

Capacity to Solve Problems at a Higher Level

Jaques described the changes in capability, and in capacity to handle complexity, as one moved from one stratum to the next as analogous to ice changing to water, and then at the next boundary, water changing to steam: or like a change in state. A more fundamental change takes place at the boundary between Stratum IV and Stratum V. Here the mental processing shifts from the 3rd order symbolic processing typical of Strata I to IV, to 4th order abstract conceptual. This abstract conceptual processing is necessary for reinventing the business model as a business unit president at Stratum V, managing a portfolio of business units at Stratum VI, or developing an integrated system of business units at Stratum VII or VIII.

While comprising a very small segment of the population, people functioning at Stratum V and above as leaders, policy makers, innovators and other influential roles have a unique capacity to understand social and economic issues, frame strategies to address them, and organize and manage capacity in the society to address them. Einstein famously said that problems cannot be solved at the level they are created. And many of the issues facing the world, from global economic complexity to climate change, will need innovative capacity of a higher order to resolve them. The good news is that the aging Western population promises much greater capacity for doing so than has been available in the past.

20th Century: Expanding Capacity to Manage Industrial Complexity

Elliott Jaques produced the table in Exhibit II to illustrate the effect of a shift in life expectancy from 50 years to 70 years, the sort of thing that happened over a hundred year period into the mid twentieth century⁵. Here the number of Stratum V and higher persons in the adult population jumps from about 1,000 per million to some 6,000 per million, or a 600% increase in the capacity to work at a 4th order level of symbolic complexity. How this comes about can be seen from the curves in Exhibit I where, living longer, more people live at Stratum V or above for a longer period.

The bulk of Jaques work was done in the mid 20th century, and in preparing his curves he stopped at age 70, well beyond what was assumed to be an appropriate retirement age. Currently in the early 21st century, and looking ahead at the anticipated lifespans of the millennial generation, the Jaques curves stop perhaps thirty years too soon.

Jaques curves were developed from his own data on executive development compiled over 35 years and studies by Gillian Stamp, Owen T. Jacobs and others. At the executive levels we are considering here, Jaques noted:

“Two significant features of these maturation bands can be noted. The higher a person’s potential capability, the faster is the rate of maturation and the later in life it continues. The higher capability individuals are still growing in potential capability long after normal retirement age.”⁶

21st Century: Expanding Capacity to Manage Global Complexity

Jaques & Cason produced a chart that they hoped would “...turn out to be a useful first approximation to the patterns of mental

complexity throughout life.”⁷ Exhibit III uses that chart to suggest the developmental patterns for a life expectancy of 100, adding 30 years to the curves in Exhibit 1. Ted Rogers life ended in his mid seventies in Stratum VII. If he had been able to enjoy the benefits of longevity likely for the millennial generation, Ted would have spent the last 10 or 15 years of his extended lifetime in Stratum VIII, where he would have been capable of conceiving, organizing and managing events in a 50 to 100 year time frame.

Exhibit III provides estimates of the change in approximate numbers of people in the population, per million, at various Stratum V and higher levels. Overall we might expect a 251% increase in this relatively rare and critical leadership capability.

Significantly, these figures suggest the number of people capable of operating at 5th order of complexity, working with universals, and dealing in time spans of more than 100 years, will expand by a factor of 30 times. This bodes well for the prospects of the human society.

21st Century: Expanding Capacity for Implementation

But what of the rest of the working population?

Jaques thought that the 80% of the population making up Stratum I and Stratum II have limited upside developmental capability. There is reason to believe he may have got that wrong.

James R. Flynn has demonstrated that tested IQ’s have risen by 3% per decade over the twentieth century. This has become known as the Flynn effect. This does not mean that the population is wildly more intelligent than it was a hundred years ago. Speaking to Trinity College in 2006, he said:

Exhibit II

**The Effect of Longevity
Rough Estimate of Levels of Capability
Change During the 20th Century**

Typical Role	Type of Work Processing	Description of Level	Approximate Numbers in population per million 21 to 50 year old population	Approximate Numbers in population per million 21 to 70 year old population	Change
Universal Genius	Declarative+	Stratum IX+	1	3	200%
Super CEO	Parallel	Stratum VIII	10	100	900%
CEO Global Corp	Serial	Stratum VII	50	500	900%
Corporate EVP	Cumulative	Stratum VI	300	1,000	233%
Business Unit CEO	Declarative	Stratum V	700	5,000	614%
General Manager	Parallel	Stratum IV	5,000	10,000	100%
Middle Manager	Serial	Stratum III	40,000	70,000	75%
Front Line Manager	Cumulative	Stratum II	400,000	400,000	0%
Front Line Worker	Declarative	Stratum I	400,000	400,000	0%

From Elliott Jaques, *The Life and Behavior of Living Organisms: A General Theory*

Exhibit III

**Life Expectancy of 100
Rough Estimate of Size of Population of Stratum V and Above
Levels of Capability**

Typical Role	Type of Work Processing	Description of Level	Approximate Numbers in 21 - 70 year old population per million	Approximate Numbers in 21 - 100 year old population per million	Change
Universal Genius	Declarative+	Universals	3	103	3333%
Super CEO	Parallel	Stratum VIII	100	500	400%
CEO Global Corp	Serial	Stratum VII	500	750	50%
Corporate EVP	Cumulative	Stratum VI	1,000	2,750	175%
Business Unit CEO	Declarative	Stratum V	5,000	12,500	150%
		Totals	6603	16603	251%

Exhibit IV

**The Flynn Effect*
Rough Estimate of Size of Population Strata I to V
Levels of Capability**

Typical Role	Type of Work Processing	Description of Level	Approximate Numbers in population per million 1975	Approximate Numbers in population per million 2025	Change
CEO+	Declarative+	Stratum V+	6,600	16,600	152%
General Manager	Parallel	Stratum IV	10,000	70,000	600%
Middle Manager	Serial	Stratum III	70,000	400,000	471%
Front Line Manager	Cumulative	Stratum II	400,000	400,000	0%
Front Line Worker	Declarative	Stratum I	400,000	80,000	-80%

* James R. Flynn has demonstrated that tested IQ's have risen by 3% per decade over the twentieth century. This has become known as the Flynn effect.

“Our ancestors in 1900 were not mentally retarded. Their intelligence was anchored in everyday reality. We differ from them in that we can use abstractions and logic and the hypothetical to attack the formal problems that arise when science liberates thought from concrete referents. Since 1950, we have become more ingenious in going beyond previously learned rules to solve problems on the spot.”⁸

Exploring the gains between 1960 and 2010, Flynn notes:

“...that the gains paid off in the real world of occupational performance. Doctors and managers and bankers and lecturers and technicians can spot the people who did those jobs 50 years ago 15 IQ points and still do the jobs.”⁹

The changes seen in IQ test scores reflect an improved capability to handle complexity, which is exactly what is measured by a shift from one Stratum to the next higher one. Elliott Jaques’ work was focused in industrial settings from the mid twentieth century onward, it seems probable that there has been a similar upward shift in capacity to handle complexity, reflecting the same dynamics that gave rise to the inflation of IQ scores. Flynn points to a shift of one standard deviation in the bell curve describing IQ. A similar shift in capacity to handle complexity would suggest the change in the distribution of people in a Western workforce in Exhibit IV.

With William Dickens of the Brookings Institution, Flynn has explored how these gains have come about, in terms of feedback loops in the developmental process. The Dickens/Flynn model posits two such loops.

The “individual multiplier” where:

“...genes have profited from seizing control of a powerful instrument that

multiplies causal potency, namely feedback loops that operate between performance and its environment. A gene-caused performance advantage causes a more-homework-done environment, the latter magnifies the academic performance advantage, which upgrades the environment further by entry in to a top stream, which magnifies the performance advantage once again, which gets access to a good university environment.”¹⁰

And a “social multiplier”, where:

“The industrial revolution is both the child of the scientific revolution and the parent of the spread of the scientific worldview. It has changed every aspect of our lives. It demands and rewards additional years of education. When a grade-school education became the norm, everyone with middle-class aspirations wanted a high school diploma. When their efforts made a high-school diploma the norm, everyone began to want a B.A. Economic progress creates new expectations about parents stimulating children, highly paid professional jobs in which we are expected to think for ourselves, more cognitively demanding leisure activities. No one wants to seem deficient as a parent, unsuited for promotion, boring as a companion. Everyone responds to the new Milieu by enhancing their performance, which pushes the average higher, so they respond to that new average, which pushes the average skill higher still. You get a huge escalation of cognitive skills in a single generation.”¹¹

At an organizational or social level, Dickens/Flynn multiplier concepts may also be important strategically. Richard Florida has written extensively about the “creative class”, and how it comes to be concentrated in key cities, like New York, Toronto, Chicago, Los Angeles

and in geographic centres like Raleigh and the Bay Area¹². Within these centres, the place of work of the creative class is further concentrated, as the Toronto map in Exhibit V suggests. Thinking in terms of the Dickens/Flynn social multiplier, it may be that these concentrations further enhance the innovative capacity of the society.

The pattern in Exhibit IV is helpful in understanding current phenomena in the workforce. In Canada in 2014 there is a shortage of skilled workers in trades that traditionally fill Stratum I roles, such as construction workers, welders, millwrights, plumbers. At the same time there are college and university educated people who are likely capable at Stratum II, working as Baristas at Starbucks. This is seen as a mismatch between the education system and the contemporary workforce. But this is not only a mismatch in skills, it is a mismatch in capability to handle complexity. There are simply more people available at Stratum II and III, than there are roles available in the workforce. There is a clear opportunity here for organizations that upshift their front-line work to Stratum II, and their Stratum II work to Stratum III, and thereby gain a competitive advantage. The shift of the population to Stratum II and III, and also from III to IV, will accelerate in the years ahead as individuals develop as they grow and mature. What is now a mismatch, has the makings of a real change in capacity to get things done and implemented. And this is a big opportunity to make talent strategy the driver of corporate strategy.

The lions share of the growth in Stratum V will be made up of people who have risen to accomplishment in general management roles in their fifties and sixties who will transition into a capability to build and lead a substantial enterprise as a Stratum V CEO or equivalent. Their places will be taken by high Stratum III middle managers who will develop the capability to fill the general management role, developing the systems thinking that allows them to trade off the various functional strands, or excel at innovation in senior professional roles.

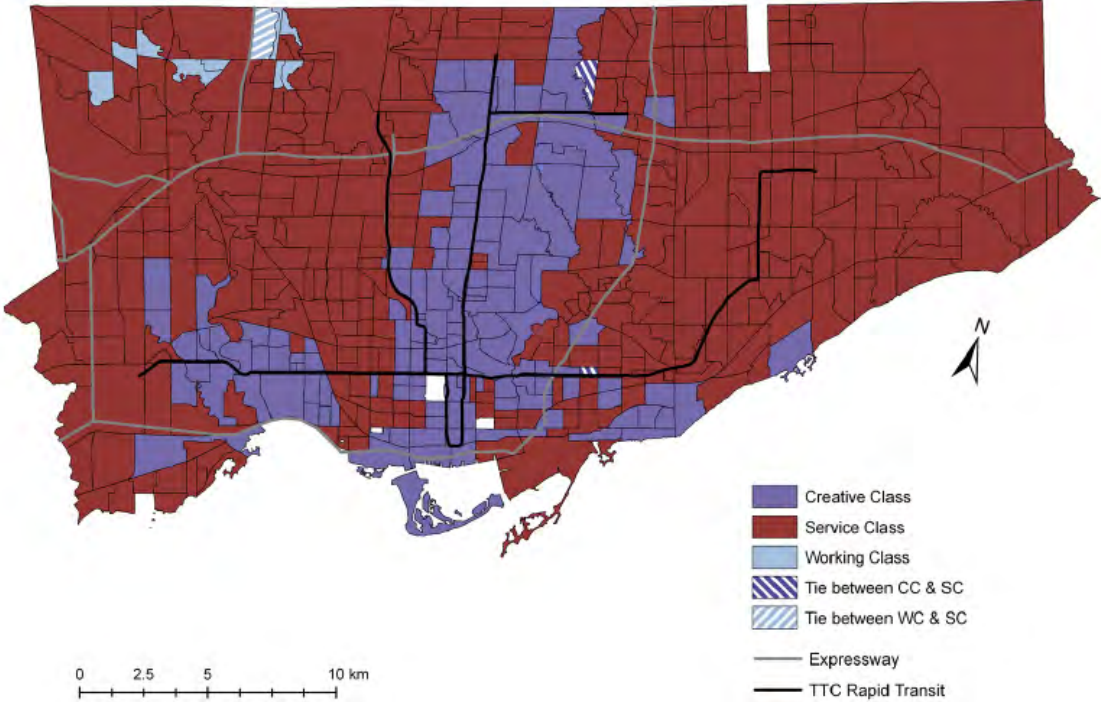
Greenspan's Pessimism is Wrong

Alan Greenspan, looking ahead to prospects for US economic growth, laments the very low savings rate in that country. Noting the importance of productivity in economic growth and well being in society, he looks to prospects for technology or innovation to take up the slack and asserts:

“Certainly there is nothing to demonstrate a major difference during the past two millennia in the degree of intelligence of, for example, Euclid, Newton and Einstein, the icons of outer-edge human intelligence of their respective eras. Technology may accumulate, but given the apparent ceiling to intelligence, the pace of knowledge accumulation, of necessity, is limited.”¹³

Greenspan is pessimistic as a result, but his analysis will likely in the future look like latter-day Malthusian thinking. Once again, it is in the assumptions, that because the Einstein icons don't get smarter, the population as whole also does not get smarter. He has his finger on a more fundamental insight in his footnote to the above passage where he notes, “The process of human adjustment to the real world may make it appear that, as a species, we are getting smarter. But that may reflect that the world in which we live is becoming more complex.” Yes, and more modern assumptions about the ability to handle complexity and how that is changing suggest that the US society does and will have the capacity to solve the productivity dilemma going forward and at a socially strategic level. This is true at both the elite leadership end where innovation is propelled, and for the mass of society where innovation is implemented and articulated.

**Exhibit V Concentration of the Creative Class:
Where they work in Toronto**



Map by Zara Matheson, Martin Prosperity Institute
Data Source: Statistics Canada

Creative class: artists, doctors, teachers, managers, architects, computer programmers.

Service class: cashiers, salespeople, police officers, food preparers, medical assistants, administrative assistants.

Working Class: miners, welders, carpenters, truck drivers, production workers, construction workers.

Strategic Implications of the Talent Upside

So what?

When thinking about the strategic impact of these patterns on companies, governments and other social institutions, they need to be seen in the context of other changes taking place in Western society. Here are several lines of thought that may shape strategic thinking.

Embrace Demographic Changes

Exhibit VI shows the population profile for Canada as it changes over a half century, courtesy of Toronto demographer David Foot.¹⁴ What used to be a pyramid no longer is. This pattern is similar in the United States and other Commonwealth countries. Clearly the work force is becoming different in very fundamental ways. At minimum, retirement age needs to fade away for most occupations. For people in occupations requiring physical vigor, late stage careers will open up that build on skilled knowledge and experience. A declining Stratum I population, will open up opportunities for currently marginalized groups, such as First Nations peoples and immigrants having difficulty assimilating. But skills training will be key. Immigration needs to focus more on skilled trades.

Look to Smart People to Innovate with New Tools

This predictability of demographics needs to be contrasted with the potential for very rapid technological change and innovation that is inherent in what MIT's Erik Brynjolfsson and Andrew McAfee *The Second Machine Age*¹⁵, which describes the exponential impact of Moore's Law. Moore's Law, which accurately predicted the doubling of the number of transistors on a computer chip every two years, is an exponential process. Brynjolfsson and McAfee show that exponential processes are very difficult for people to grasp, as plots of them seem

to climb vertically in an incomprehensible way. They plot these patterns on logarithmic scales to make them visible, but maybe no more comprehensible. Exhibit VII suggests some of the underlying patterns, which show both increasing complexity and technological capacity to handle it. What is happening here is both dramatic and with unpredictable impact. But it does suggest that growing capacity to handle complexity, both more smarter 75 year olds and a smarter labor force throughout, will be enabled and leveraged by a rapidly evolving digital capacity.

Get More Education

There is strong evidence supporting the economic benefit of more education, for both individuals and the society. Brynjolfsson and McAfee show the financial payoff to higher education in Exhibit VIII. There are two reasons why more college and graduate education are important for the future. The first is that such education provides the basis for the skilled knowledge that can assure that the greater potential to handle complexity in the population is realized. The second reason lies in the "social multiplier" proposed in the Dickens/Flynn model, where the capability to handle complexity is enhanced by interaction with peers.

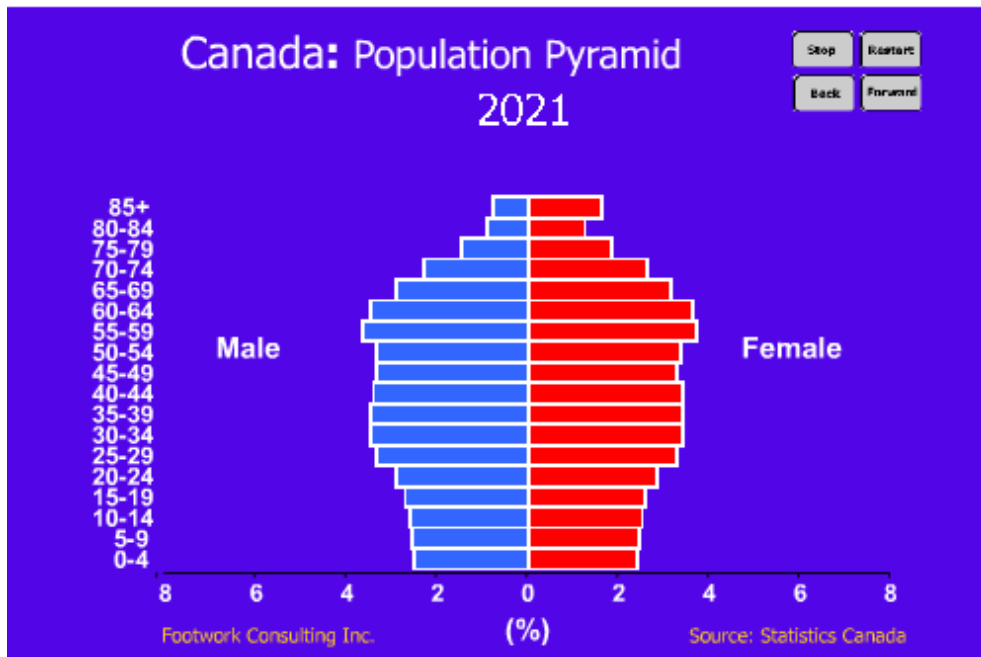
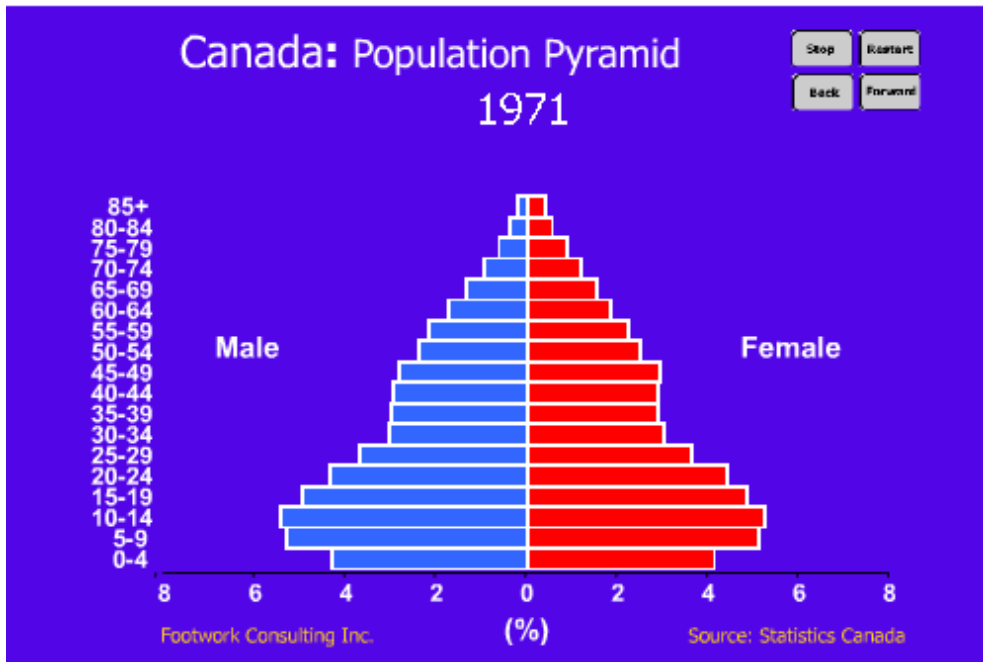
Understand Levels of Complexity in Work

The modern organization needs be more intentional in identifying the complexity required in its various roles. There is a clear approach to doing this, pioneered by Elliott Jaques in the 20th century, and articulated by modern authors such Tom Foster in his *Hiring Talent: Decoding Levels of Work in the Behavioral Interview*.¹⁶

Understand the Distribution of Capability in the Population

The society would do well to assess the population on the same basis, so that the proportions Jaques estimated in the mid 20th

Exhibit VI



www.footwork.com/pyramids.asp

Exhibit VII: The Many Dimensions of Moore's Law

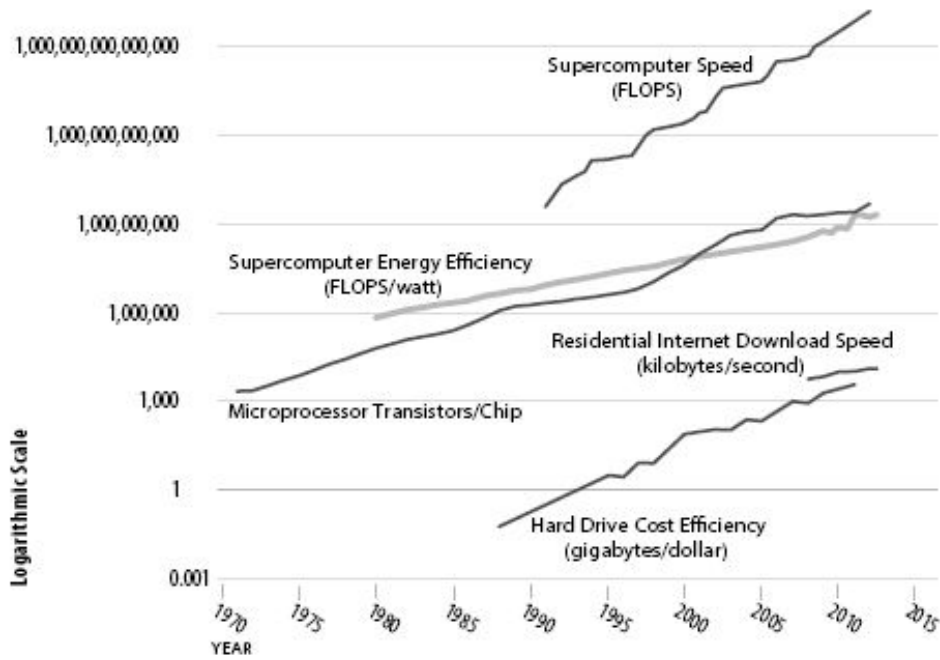
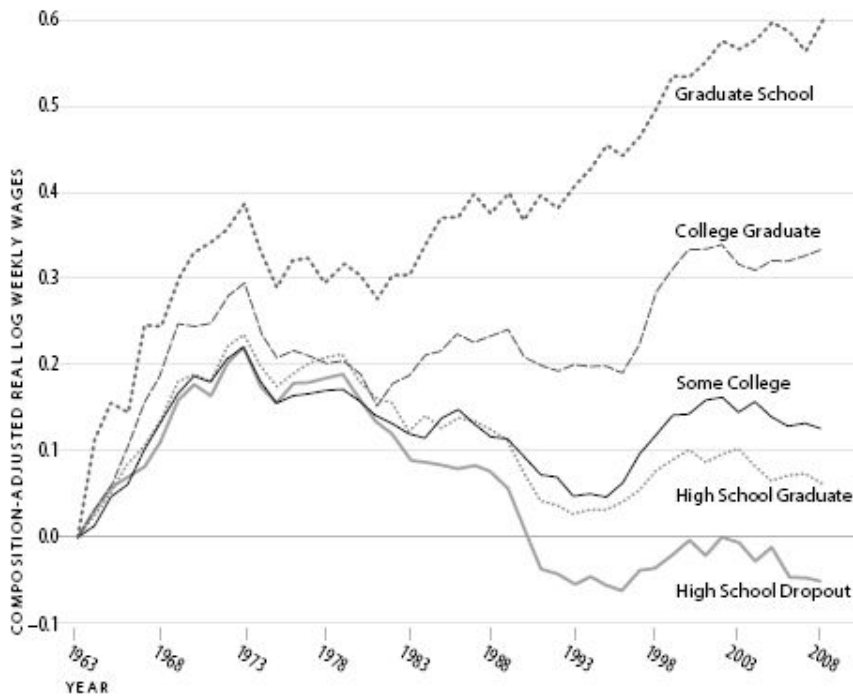


Exhibit VIII: Wages for Full-Time, Full-Year Male U.S. Workers: 1963 - 2008



From Erik Brynjolfsson and Andrew McAfee, *The Second Machine Age*

century, as suggested in Exhibit II, are brought up to date for the next quarter century. Our colleague, Herb Koplowitz, suggests that a random sample of perhaps 5,000 people would be adequate to do this, and it could be done by telephone.

Get the Old Timers On-side Before They Get You

Jim Collinson, a colleague of ours, has been supporting a group in Manitoba who have been challenging that province's strategy in building some \$25 billion in electrical generating stations and power lines.¹⁷ The group includes a retired Dean of Engineering, to former vice presidents of Manitoba Hydro, a former president of

the utility, and several others, all in their 70's, 80's and 90's. He writes, "My observation is that the older gang is spending up to 16 hours a day working on very high level stuff, and without their effort the Manitoba public would not be exposed to a variety of options that are making Manitoba Hydro squirm. This is in large part due to the complexity and scope of the work the group has undertaken."¹⁷

The lesson: get this capacity working with you rather than against you.

Endnotes

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8. James R. Flynn, "Beyond the Flynn Effect: A solution to all outstanding problems-except enhancing wisdom", Annual Psychometrics Centre Public Lecture, Trinity College, Cambridge, 2006, <http://www.psychometrics.cam.ac.uk/page/67/jim-flynn.htm>
9. James R. Flynn, *Intelligence and Human Progress: the Story of What was Hidden in our Genes*, Oxford, Elsevier, 2013.
10. James R. Flynn, *What is Intelligence?* Cambridge, Cambridge University Press, 2009.
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16. Tom Foster, *Hiring Talent: Decoding Levels of Work in the Behavioral Interview*, 2013.
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The benefits are organizational effectiveness, fulfilled people and organizations designed for value-creation, sustainability and social well-being.

Note: inspired by the work of Wilfred Brown and Elliott Jaques

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