Roger Kaufman, CPT, PhD, and one of ISPI’s best-known contributors, adds his Organizational Elements Model (OEM) to the TrendSpotters Open Toolkit (TOT) this month. Roger (rkaufman@nettally.com) is professor emeritus, Florida State University, Director of Roger Kaufman & Associates, and Distinguished Research Professor at the Sonora Institute of Technology. He consults with public and private organizations in the US, Canada, Australia, New Zealand, Latin America, and Europe and is probably best known to ISPI colleagues for his work in strategic planning and needs assessment with his focus on the Mega or Societal level. Roger is a past president of ISPI and has received the society’s coveted awards for Distinguished Professional Achievement and Member for Life.

Genesis of this Model
The OEM grew out of a workshop Roger was conducting with California county educators in San Francisco, some years ago. During discussion, he realized that participants did not know how measurable objectives added value to both the client and society. In response, Roger created the basic criteria for Mega—societal value added—which became the cornerstone of the OEM, and presented it to the group. Roger followed the workshop with an article (Kaufman, R. A., Corrigan, R. E., & Johnson, D. W. (1969). Towards educational responsiveness to society’s needs: A tentative utility model. Journal of Socio-Economic Planning Sciences, 3,151-157.) that laid the foundation for both the OEM and the measurable criteria for Mega thinking and planning. ISPI Past President Dale Brethower tidily captures the essence of the Mega: “If you are not adding value to society, you are subtracting it.”

Model Description
TrendSpotters has featured numbers of discussions involving the three levels of organizational results variously termed worker, work, workplace, or job, process, organization. In Mega, the levels are individual and small group, organizational, and external clients and society. The additional levels in the OEM for resources and starting requirements and process/activities/methods show, in Roger’s work with Mega, that an individual organization has the ability to make an impact far beyond its own doors.

The OEM is sub-titled The Five Levels of Results, the Levels of Planning, and a Brief Description. See Table 1 from Roger Kaufman’s PIQ article. Vol 18, No 3, 2005 – It focuses on adding measurable value for external clients and society using the organization as the vehicle. By aligning resources and inputs with processes and activities and those, in turn, with programs, projects, and activities organizations can deliver extraordinary benefits to the communities they serve. For more information see Roger’s article, Defining and Delivering Measurable Value: a Mega Thinking and Planning Primer, PIQ, Vol. 18, No. 3, 2005.

How to Use the Model
The OEM is particularly effective when considering the ethics of delivering something useful to clients in a shared world. For example, in Roger’s recent book on strategic thinking and planning, see Roger Kaufman’s book Change, Choices, and Consequences, there is a case based on hurricane Katrina that describes how disaster
preparedness agencies used the systems approach to plan for potential emergencies. By taking a systems approach the groups did not consider how their levees and restraints would affect those of the other parishes, or how the entire system would help people survive a disaster. Flooding and incredible loss of life and property was the result. Had the agencies taken the OEM’s holistic system approach, the response to Katrina would have resulted in considerably fewer losses.

The OEM reminds us that in an organization, an action in one area, regardless of how properly systematic our approach, will fail utterly unless we integrate our plans with all the other entities that will be affected, including society.

Success Story
Mariano Bernardez (mbernardez@expert2business.com) worked with Refinor, For additional information contact Bernardez, M. (2004) The Refinor Case: Integrating Sound Business Practice with Societal-based Objectives and Ethics: lessons Learned from Applying Mega Planning and Thinking. ISPI 2004 Conference Proceedings, an energy company in Argentina, just after it was privatized. Refinor was losing money and had a traditional culture of wealthy management/poor workers. Using the OEM as a guide, Mariano implemented a modified version of the General Electric Company’s Workouts. He gathered all the stakeholders – the communities, company executives, workers, parents, teachers, and children – and asked them to describe the kind of world they wanted to live in defined in terms of Mega. From the information gathered, Refinor developed a new mission: to add value to Argentina, to the community, to its members, and ultimately to Refinor’s customers. The company implemented new societal-based objectives and experienced a turnaround in one year.

Advice to Users of the OEM
Roger advises new OEM users to put aside all existing paradigms about practicing performance improvement from the bottom up and from the inside out. Instead, embrace an approach that begins outside the organization with the larger society and then moves into the organization, focusing on external ends rather than means. Various ISPI models can help us to look at the ends (results) first and work backward to add Mega to the alignment.

Be aware that in some countries such as South Africa and Botswana with their huge AIDS problems, companies regularly include societal requirements in their mission statements, organizational goals, and strategic planning but rarely do it with rigorous criteria, leaving the real objectives unclear. They must measurably address the AIDS epidemic and its life-taking consequences in their countries because if they do not, there will be no workers for their companies, unbelievable poverty, and loss of life that could spread beyond their borders.

Links to the Performance Technology Landscape
The OEM supports these principles of Performance Technology:

- **R** Focus on Results – start performance improvement projects at the end with societal concerns first
- **S** Take a System viewpoint – consider the effects of any solutions you recommend on the entire system (singular) encompassed by the Mega level
- **V** Add Value – Meld the societal value of performance improvement with the value to all stakeholders, including our shared society
Establish **Partnerships** – Build partnerships between organizations and society, so that the aftermath of events like hurricane Katrina will be very different

**Application Exercise**
To get started with the OEM consider your organization and your own work ethic. Then complete the table below: See Table 3, The Basic Questions Every Organization Must Ask and Answer, from Roger Kaufman’s PIQ article, attached

For further reading:
- Visit the website for the PIQ Special Issue on Mega:  

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