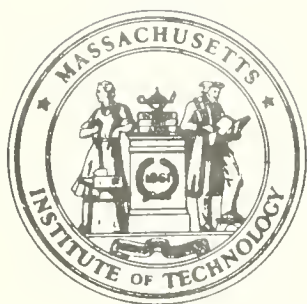


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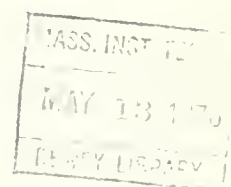
ORGANIZATION STRUCTURE —
AN APPROACH TO REVISION

Dan I. Candeia

WP 848-76

April 1976

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ABSTRACT

This paper is a survey of some of the problems involved in the revision process of an existing organization. The first part briefly discusses theoretical issues. The rest of the paper presents the views of different writers with respect to some practical problems encountered in assessing the current situation of the organization, developing the "ideal" structure, and handling the mechanics of reorganization.

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1. Some Theoretical Issues

Management is a social process entailing responsibilities for the effective and economical planning and regulation of the operations of an enterprise, in fulfillment of a given purpose or task. The responsibilities of management involve major issues like:

- judgement and decision in determining plans and in using data to control performance and progress against plans;
- guidance, integration, motivation and supervision of the personnel composing the enterprise, and carrying out its operations.

The organization is the framework within which and by means of which the management process can be applied. The organization is concerned with the definition of:

- the responsibilities of the executive, supervisory and specialist positions into which the management process is subdivided;
- the formal interrelations established by virtue of such subdivided responsibilities (an organization chart is a partial illustration of these responsibilities and relationships).

The history of thought on organization has known several schools, that differed from each other with respect to the problems considered central to studying the management process and designing the organization structure. They also differed in terms of the set of principles based on which answers to theoretical and practical questions have been provided. Surveys of the main streams of thought were developed in many books on organizations, of which we mention: Brech (pp. 497-547), March & Simon, Dale (1967), Newman et al. (1967). Among the problems to which special attention has been paid by writers some evolve as exceedingly important in understanding the phenomena that take place inside organizations. These concepts will be briefly

touched upon in what follows, and references will be given.

1.1 Functionalization vs. divisionalization

Functionalization is the division by function, and it is used by every organization to some extent. A function might be defined as a single activity, but in modern organizations it commonly means a group of related activities that are placed together under a single department head.

The prototype of the "functionalized company" is one in which division by function runs straight down through the whole organization (Fig. 1).

THE FUNCTIONALIZED COMPANY

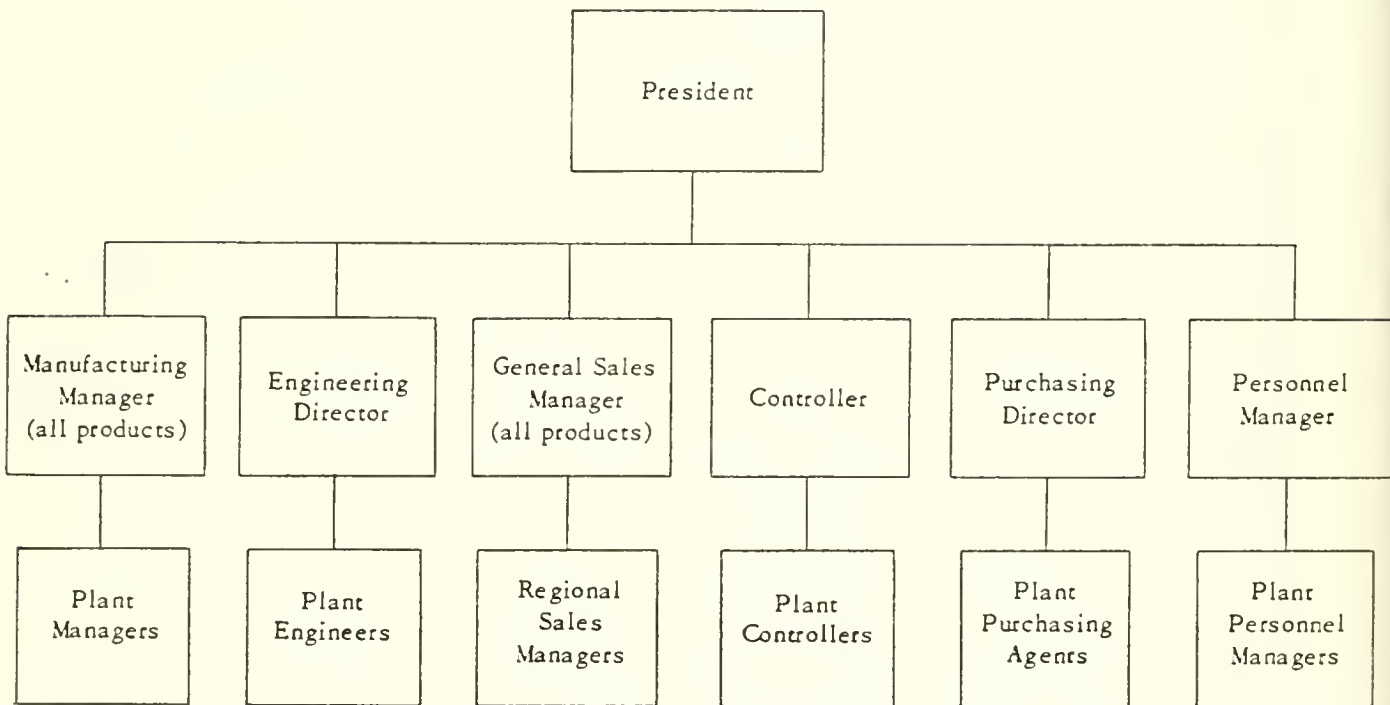


Fig. 1 (Source: [8], p. 108)

All companies tend to divide work by function to some extent - that is, at some levels in the organization.

Divisionalization is setting up company divisions whose heads are responsible for both production and marketing. The division heads are judged on the basis of profit rather than on sales volume, or volume or cost of production. Geographical divisions, and product divisions are among the most commonly met; customer divisions may also be found like, for instance, in companies that sell products to both military services and civilians. If a company has too many divisions these may be grouped; divisions grouped together should, of course, have some degree of "commonality" like common marketing or supply problems, or similar technology, so that liaison between them will be of value and economies of scale achieved (Fig. 2).

ORGANIZATION WITH DIVISIONS GROUPED

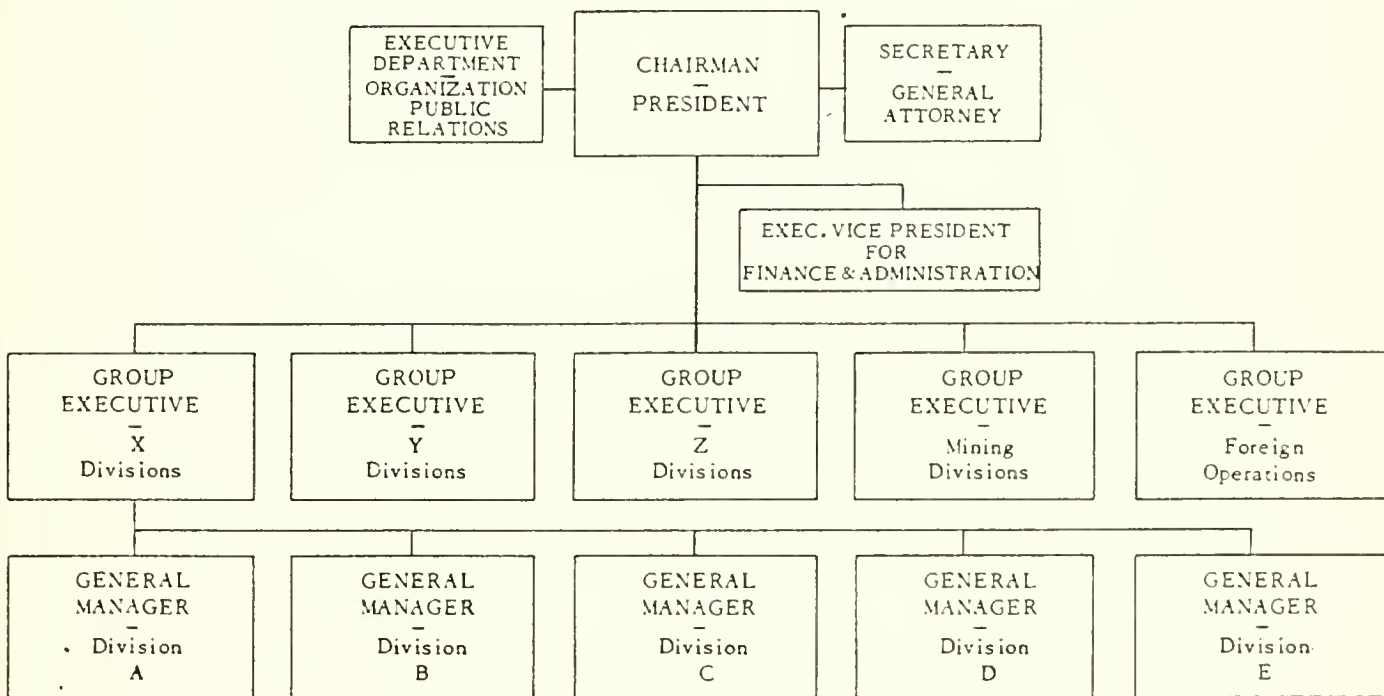


Fig. 2 (Source: [8], p. 117)

1.2 Centralization vs. decentralization

The question: "Who in the organization hierarchy decides what is to be done?" is the central issue of decentralization.

The greater the amount of managerial work the chief executive passes along toward the operating levels, the more decentralized an organization is said to be. By contrast, a centralized organization is one in which a relatively large portion of the management work is performed at the highest executive levels.

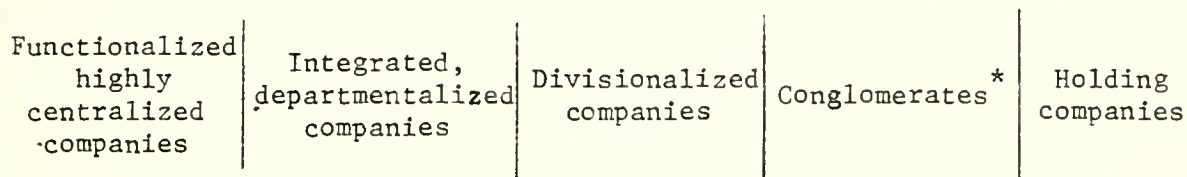
It is to be pointed out that decentralization/centralization does not mean a form of organization. Theoretically, decisions may be pushed down the line or centralized at the corporate headquarters in both functionalized and divisionalized organizations. However, from a practical point of view, divisionalized structures are "better suited" to be run in a decentralized manner, while functionalized structures suggest that a rather centralized management process is in force. This may explain the reason behind the use of expressions like: "decentralization by geographical region" or "decentralization by product divisions".

Among companies with a functional form of organization and a higher degree of centralization are companies in the mining, cement, paper, steel, and oil industries. Characteristically, such a company has relatively few large customers, relatively few large suppliers, and products that require closely related technologies. Production tends to be large-scale and technologies will change only slowly. In these cases the headquarters staff men may have only functional authority over their counterparts in the plants, but all manufacturing operations are under a single head, and so are all marketing activities.

Divisionalized organizations are found in very large companies which manufacture a large variety of products with diverse technologies (e.g.

Westinghouse Electric Company, General Motors, Du Pont), or in companies with operations geographically dispersed (utilities, some mining companies, store chains, multi-national corporations). Some large oil companies have lately adopted a basic product breakdown (petroleum products and chemical products) largely in order to promote further growth of chemical products.

Profit decentralization is an advanced stage of decentralization, by which a company is split up into product or regional divisions, each of which is fully responsible for its own profit or loss. If we view centralization and decentralization as points on a continuum (Barnes et.al., p. 98), profit decentralization can appear with divisionalized companies, and is always present with conglomerates and holding companies:



For successful profit decentralization each semi-autonomous division must be self-sufficient; it must have a full management team responsible for all the functions of the enterprise.

There are advantages associated with decentralization of authority, such as: stimulation of morale of the key men in each division, improved communication and coordination within divisions due to the smaller size to be managed, more effective control. Among limitations and difficulties we can mention facts like: the possible inadequacy of profits to measure the performance of a division (short run vs. long run profits), difficulties with finding executives with the capacity and willingness to work effectively within the system.

* A conglomerate refers to a company whose products bear no obvious relationship to one another.

Further discussions on the topics of functionalization vs. divisionalization, and centralization vs. decentralization may be found in Newman et.al. (1967), Chap. 3, 4, 13, Dale (1967), Chap. 6, White, p. 44, Brech, p.115.

It is important to mention that no matter how advanced the process of decentralization is there are certain tasks that require strong central guidance; those tasks should not be decentralized:

- the setting of broad policies within which the divisions are to operate;
- the setting of overall company objectives;
- the design of the organization structure;
- the selection of top corporate officers and key executives within the division;
- approval of major capital expenditures;
- the evaluation of the total business in relation to its overall objectives;
- the retention and allocation of profits.

These functions require company-wide coordination, and so they should be decided upon at corporate headquarters level (Barnes et.al., p. 99, Newman, et.al. (1967), p. 79).

1.3 Delegating

Delegation involves transferring to others the formal right to perform certain tasks, and the attempt to create an obligation on the part of the person receiving that right to perform the task to a certain standard.

Every time a manager delegates work to a subordinate three actions are either expressed or implied:

- the manager assigned duties to the subordinate;
- the manager grants authority, that is, he transfers to the subordinate certain rights;

- the manager creates an obligation, that is, in accepting the assignment a subordinate takes on an obligation to his boss to complete the job.

It should be mentioned that, unlike a duty or authority, obligation cannot be delegated. Indeed, one man can pass to another the instruction to perform a certain task. But by doing so he does not absolve himself of any obligation he undertook, nor does he automatically create an obligation to himself on the part of his subordinate, unless that subordinate feels a need to perform the task. Obligations cannot be passed down the organization; rather, new obligations must be created at each level.

For further reading on this subject see the following references:

Newman, et.al. (1967), Chap. 5, Newman (1963), Chap. 11, Barnes et.al., Chap. 7, Branch, p. 188.

1.4 Staff vs. line

A line activity, in any human organization, is that activity for which the organization was created. The role of staff may embrace three activities: rendering advice and information, providing specific service, furnishing inspection and control. Writers on organization have always emphasized that, in order to avoid double subordination, staff should never give orders to the line unless granted functional authority by the chief executive.

The importance of defining which departments in an organization are line and which are staff lies in the requirement that a clear structure of vertical and horizontal interrelationships be established if delay in action, conflicting orders, and activity disruption are to be avoided.

For further discussion on this topic, the interested reader can consult White, p. 32-44.

The above were just some theoretical aspects of major importance. Other issues concerning organizations such as : planning and control, span of control, leadership, the informal organization, authority, power, influence and other human factors are treated in references indicated in the bibliographical list at the end of the paper.

2. "Ideal" Organizations. The Need for A Change.

Before setting out to analyze an existing organization and to determine whether a revision is necessary, the researcher would certainly like to bear in mind the "prototype" of the "ideal" organization. According to Beckhard, pp. 9-13, the features of an effective, healthy organization are:

a) The total organization, the significant subparts, and individuals, manage their work against goals and plans for achievement of these goals.

b) Form follows function, that is, the problem, or task, or project, determines how the human resources are organized.

c) Decisions are made near the sources of information; this means the need to move toward a norm of the authority of knowledge.

d) The reward system is such that managers and supervisors are rewarded and punished comparably for: short-term profit or production performance, growth and development of their subordinates, creation of a viable working group.

e) Communication laterally and vertically is relatively undistorted. People are generally open and confronting; they share all the relevant facts including feelings.

f) There is a minimum amount of inappropriate win/lose activities between individuals and groups. Constant effort exists at all levels to treat conflict and conflict-situations as problems subject to problem-solving methods.

g) There is high "conflict" (in the sense of clash of ideas) about tasks and projects, and relatively little energy spent in clashing over interpersonal difficulties because they have been generally worked through.

h) The organization is an "open system"; the organization and its parts see themselves as interacting with each other and with a larger environment.

j) General practice is to build in feedback mechanism (the "action-research" way of operating) so that individuals and groups can learn from their own experience.

Other features may be added to the above characterization:

- The organization must have an effective program for the recruitment and development of talent.
- Integration and commitment to the goals of the organization.
- An internal climate of support and freedom from threat, since being threatened undermines good communication, reduces flexibility, and stimulates self-protection rather than concern for the total system.

As an organization is a dynamic system placed in an equally dynamic environment reorganizations will be necessary from time to time. A reorganization is any change in the distribution of duties or decision-making power, or in the relationships between positions. Among the reasons behind reorganization decisions the following are considered the more important by Dale (1967), Chap. 12:

(1) Growth is perhaps the single most important reason for reorganization, particularly a complete top-to-bottom reorganization. Growth may take place in many ways: expansion of the output of existing products, addition of new products and technologies, vertical integration, acquisition of new companies.

(2) Declining economic performance in the form of declining profits, or profits increase lagging behind sales expansion. A centralization is likely to occur in such cases as top management wants to control the company more closely; also, centralization usually reduces the administrative expense.

(3) Changing management trends - as no company likes to be considered backward it will tend to adopt popular and "fashionable" organization patterns (e.g. in the 1950's the trend in the American industry in general was toward decentralization by divisionalization; in the 1960's there seemed to have been some movement toward recentralization - Dale (1967), p. 118).

(4) Changes in management personnel usually bring structural changes.

(5) External events such as: changes in the actions of competitors, in antitrust policy, in marketing channels, or in the status of major customer industries.

If the organizer reaches the conclusion that the organization is neither healthy nor efficient so that the time for a revision has come a reorganization process should be instituted (it will be described later). However, no matter what corrective action is taken, there are certain prerequisites for a successful reorganization effort (Beckhard, p. 97):

i) There is pressure from the environment, internal or external, for change.

ii) Some strategic persons or people are "hurting".

iii) Some strategic people are willing to do a real diagnosis of the problem.

iv) There is leadership in the reorganization process (consultant, key staff man, new line executive).

v) There is collaborative problem identification between line and staff people.

vi) There is some willingness to take risks in trying new forms or relationships.

vii) There is a realistic, long-term perspective.

viii) There is a willingness to face the data of the situation and to work with it on changing the situation.

ix) The system rewards people for the effort of changing and improvement, in addition to the usual reward for short-term results.

x) There are tangible intermediate results.

The above conditions should be considered as necessary conditions if a reorganization is to succeed.

3. Analysis of the Current Situation

If it is felt that a reorganization might be needed, the actual decision to change should be based on evidence of organization shortcomings like:

- Executives are confused about the objectives of their own work or the extent of their duties and/or authority.
- Total or partial lack of coordination: divisions or departments work at cross purposes, new products don't go into production quickly enough, or sales management does not learn of the new products and their possibilities soon enough to do an effective job of marketing them.
- Impossibility of holding any person accountable for the success or failure of any effort, many people may feel they have several bosses and they may be uncertain which of them is their true line superior.
- Slow decision making or many incorrect decisions.
- Lack of cooperation between line and staff.
- Lack of "promotable" executives.

Occasionally there will be a dramatic demonstration of the need for a change when an executive leaves and it becomes evident that no one in the company is capable of assuming all his duties.

The decision to change can also be based on foreseen (future) shortcomings should the current organization be not changed.

It is important to reaffirm that the organization must be designed to suit the business of the enterprise, and that the first stage is to secure a thorough understanding of the current situation. Kemball-Cook, pp.31-38 recommends five stages in assessing the factors of the current business

situation:

(1) Current operations - the review of the current operations will be a factual summary of all the background and current activities of the business, covering the following areas:

- history and background: key stages in the development of the business, including acquisitions, mergers, changes in ownership and control; influence of tradition, geography, etc.
- products: range of products, relative importance and volume, projected new products.
- markets: geographical location, market level, seasonal factors, share of market and competitors' shares for the main products, characteristics of distribution, elasticity of demand with price change.
- production technology.
- planning and control: production planning and control systems, financial and accounting control systems.

During this stage it is important to identify the technological imperatives, which are those factors or conditions which cannot easily be manipulated to suit organizational convenience, and which must therefore be accepted as part of his basic premises by the organization designer. Here are some examples of such imperatives: material characteristics (e.g. variability of raw materials), process characteristics, labor characteristics, market characteristics.

During this appraisal stage, major operating problems should become apparent. The following defects, outside the strict field of organization design, are commonly found:

- planning and control systems: lack of forward planning; lack of management accounting systems; lack of co-ordination of sales and production;

lack of stock control.

- financial: low or falling yield on net assets; no knowledge of how assets are employed in different trading activities; overtrading and lack of cash; inadequate control of debtors.
- marketing and sales: inadequate knowledge of the total market; of own share, and of trends; wrong product or market mix; selling for quantity rather than for contribution; incorrect pricing policy.
- product development: development effort inadequate to keep pace with technical change or market opportunities; development not related to market needs; dispersal of effort over too wide a range of products; lack of routine control over development costs.
- production: low manufacturing performance; inadequate methods improvement projects; vague or unrealistic quality standards.
- purchasing: dispersed responsibility; lack of management effort.
- personnel: no staff development or succession planning; poor communication with labour.

(2) Corporate aims are often expressed as answers to the question:

"What is this company fundamentally in business to achieve?" It is important to understand them because they affect the company's strategy and operations deeply.

(3) Assessment of the environment - there are three components of the environment which should be looked into: the way in which consumer needs will change; the way in which technology will develop; the policies and successes or failure of competitors.

(4) Assessment of existing resources - a realistic appraisal must be made of the resources available to the business, since these will place a limitation on the scope of the plans which can be made, and of the opportu-

nities which can be grasped. The strengths and weaknesses of the resources will give some indication of the directions in which it will be most profitable to develop the business. The term "resources" is meant to include: material resources, financial resources, human resources, market standing.

(5) Development of corporate policies and objectives.

The above steps are meant to ensure a thorough grasp of the real business situation. They will provide the overall framework which will facilitate further analysis of the organization structure. This framework will ensure that the manager does not overlook some important factors which should condition the whole organization structure.

Once the reorganization decision has been made and the researcher has a clear picture of the organization's operations and its environment, collecting data about the current organization structure and the management process is the next logical step.

Questionnaires and interviews are important data collection tools; if well administered, they will provide detailed information from the executives at various levels. This will throw light on the functions that are being performed and indicate who in the organization is actually performing them. In a major reorganization all those concerned should be asked to contribute, but if this is not possible, the organizer should work with representative samples.

In addition to questionnaires and interviews there are other sources of information, some of which have been used in assessing the business situation: organization charts and manuals (if they exist), annual reports, product information, policies and procedures, presidential letters, executive memoranda, minutes of committee meetings, public releases. However, the analyst should be aware of the fact that the organization as it presently stands may differ

from the written descriptions, because the operation of the informal organization may have occasioned some shifts in power and duties. But the record will at least make clear the formal intent and will provide a basis for further study.

The questionnaires and interviews, as mentioned above, are very important in giving the organizer a picture of the current status. Questionnaires should obviously be long enough to cover the outstanding issues, but short enough to be manageable in the analysis. Data requested of each executive might include the following (Dale (1967), p. 213):

(1) Name, organizational unit, position, location of work.

(2) Basic mission.

(3) Major responsibilities or duties, ranked either in order of importance or in order of the time spent on them.

(4) Name and title of superior.

(5) Name(s) and title(s) of subordinate(s).

(6) Principal relationships to other functions or organizational units, including services received from other departments and provided for other departments.

(7) Authority or powers of decision making on: capital and current expenditures, personnel changes, policies, and routine and nonroutine procedures. In this section, respondents may be asked to state their authority in terms of its limits - for example, the amount of money they may spend on capital improvements without authorization from higher authority.

(8) Committee memberships and contributions thereto.

(9) Reports received and records maintained.

(10) Basic standards used in appraising success on the job.

Answers to such a questionnaire do not in themselves provide information on personalities, power struggles, and similar matters, but clues can be

gathered by cross-checking replies from heads of different groups.

If the job will not be too time consuming, answers to the questionnaire may be obtained through private, confidential interviews perhaps lasting a number of hours and, if possible, conducted without interruption. In any case, the questionnaire answers, at least those from heads of departments, should be supplemented by interviews.

The interviewer's skill is, of course, of supreme importance here. He has to create a favorable atmosphere for the interviewee. He should not ask personal questions, such as "How do you feel about so-and-so?", rather, he should ask for opinion on ways in which the organization can be improved and on any difficulties the interviewee is experiencing, such as whether there are any reports he is not getting that would help him. The analyst should be alert to statements that indicate the motives of the interviewee, and he must ask himself: "What viewpoint is this man trying to push or oppose?" "What self-interest is he trying to promote?". Certainly, there are much more problems as to what questions should be asked, what the attitude of the interviewer should be, and how much of the interview should be considered confidential. Some of these issues are discussed by Dale (1967), p. 215. Here is an example of a checklist drawn up by a group of reorganizers to clarify the current status of the marketing activity (Dale (1967), pp.216-217):

(1) Has policy been formulated to insure that marketing and other objectives will be achieved? What is the company's policy? Has it been committed to writing? How well and how widely is it understood throughout the company?

(2) How is the marketing function organized? What is the basis for the division of the management responsibility within the function - customer type, geography, sources of supply? What are the pros and cons of this

arrangement?

(3) How large are the selling groups? What is the span of control of management at each level?

(4) What is the relationship (extent and division of responsibility) between field selling and sales office staff? How distinct is this relationship? Are any difficulties experienced? What are they?

(5) What terms of reference exist for management posts? Do managers know what purposes to achieve, what duties to perform, and what limits exist on decision making and other authority? Is accountability clear-cut? What standards and controls exist to permit "management by results" and "management by exception"?

(6) What marketing data are collected? What marketing information is derived from them? Who gets the marketing information? What is it used for? Are there any deficiencies in content, routing, timing, or presentation? What are they?

(7) Are there severe or frequent fluctuations in workload? Has there been a growth or a reduction in the number of employees out of proportion to the essential workload?

(8) Are there complaints from other departments, from suppliers, or from customers that their needs are not satisfied in any way? What are they? What has been, or is being, done about them?

(9) How was the location of offices and facilities determined? How does this arrangement influence customer, management, and employee convenience, cost, and effectiveness?

(10) Is there low morale, frustration, high turnover, staff shortage in any area, or inadequate provision for management succession? To what can this be attributed?

The data obtained from all available sources has to be analyzed in order to establish what the deficiencies are and to find ways to alleviate or solve them. Following is a set of issues to be checked against the data made available in the preceding investigative phase:

(1) Which are the key managerial objectives? Which contribute towards the corporate aims? Are they being serviced by the necessary key tasks?

(2) Are key tasks grouped rationally, so that tasks which must closely support each other are in the same main functions and roles?

(3) Are there any tasks without any apparent objectives? Consider whether these are in fact redundant and can be discontinued.

(4) Are there any key tasks which ought to be performed, but appear to be forgotten?

(5) Are reporting relationships and the communications channels arranged so that staff who must cooperate can do so freely enough?

(6) Is there consistency and compatibility:

(a) between delegated authority and accountability?

(b) between accountability and control reporting for all superior - subordinate relationships?

(7) Can decision making be rendered more efficient?

(a) by clearer policy making and decision rules?

(b) by providing better management information?

(c) by reducing the number who must be consulted?

(8) Are skilled people used on jobs which need their skills? Are expensive resources fully used? Do managers have reasonable but not excessive loads? Are the spans of control appropriate, taking into account the various factors which may limit the span?

(9) Are the number of levels of management appropriate, having regard to the necessary spans of control?

(10) What problems have been identified as caused or aggravated by faults in management structure?

The answers to the above questions are supposed to shed light upon the delicate areas and to suggest a framework for improvement. More specific questions, which the analyst will be asking himself, may be prepared in order to achieve a rigorous disciplined approach to the analysis. Kembball-Cook, pp. 192-195 provides an example of such a check list in the form of 38 questions which probe into the way the criteria of organization are being applied; this check list is reproduced in Appendix I to this report.

4. Restructuring the Organization

4.1 Principles of organization

Based on the findings of the analysis suggested above the organizer should proceed to develop the "ideal" organization. Brech, Chap. 6 recommends a set of principles of organization structure to be observed by organization designers. These principles are concerned with achieving effective and clear subdivision of the management tasks (as relevant to the circumstances concerned) while maintaining integrated unity in action. Some of Brech's principles are listed below.

(1) The tasks of all members of an enterprise, or of all its divisions, departments, sections, etc. should be clearly defined, preferably in writing; the definition should also specify the (formal) relations of each particular member or section to any others with which there is to be active contact.

(2) When the size of the enterprise necessitates subdivision of executive and supervisory tasks, the most useful division is into groups of major related activities, determined by specialization of function (e.g. finance, marketing, production, etc.) or operation (e.g. divisionalization by product).

(3) When the increasing size or activity of an enterprise threaten to impair the effectiveness of management through the overloading of executive and supervisory members, appropriate delegation of duties to lower levels in the direct line or to staff members should be made; appropriate provision has then also to be made to ensure continuous effective coordination.

(4) The definition of responsibilities and relationships forming an organization structure should provide;

(a) a single chief executive responsible to the policy-forming body (e.g. the board of directors) for the effective conduct

of the operations of the enterprise;

- (b) adequate decentralization of decision through the delegation of tasks and authority;
- (c) clear lines of responsibility linking the chief executive with the various points of decision or operation;
- (d) the span of control of a superior limited to a reasonable number of subordinates;
- (e) the integration of staff departments in such a way as not to impair the clear lines of responsibility and command.

(5) If tasks are properly defined, the delegation of tasks, and its acceptance, automatically implies delegation of the corresponding authority to make decisions, to control appropriate resources, and to secure the carrying out of the appropriate activities. If limitations are intended to apply to any executive's duties and authority, they should be specifically mentioned in the position descriptions. When duties are delegated, a superior is still to be held accountable for all the relevant activities of subordinates within his jurisdiction, whether he has issued specific instructions for such activities or not.

(6) An organization structure cannot be regarded as immutable. It must be flexible enough to admit adjustments when required by changes in basic circumstances.

These principles may be complemented by some organization criteria suggested by Kemball-Cook, p. 91:

(7) Managers of the principal functions should answer directly to the chief executive.

(8) The number of organization levels should be the minimum number needed for the size and character of the business; the number is of course partly, and inversely, dependent on the sizes of the spans of control. An

excessive number of levels degrades communications, upwards and downwards. The following are suggested to be considered as minimum numbers of levels (counting first line supervision as the first level):

<u>Size</u>	<u>No. of employees</u>	<u>No. of levels</u>
small	150	3
medium	1,000	4
large	7,500	5
very large	30,000	6
the largest	200,000	7

(9) A deputy should be nominated for each appointment, and should be trained to take over in the absence of his superior; a deputy is strictly a "stand-in", not a full time appointment. Provision must of course also be made for the training and development of a successor, who need not be the same as the deputy, for each key appointment.

These principles are meant to provide guidance for the normal, multi-function, stable business, of normal size. They should be applied innovatively, making allowance for special cases.

The findings of the data analysis presented in section 3 above will certainly show that one or more principles are violated by the current organization structure. In this sense, the most common of the weaknesses in organization structure are (Kemball-Cook, p. 96):

- (a) lack of definition of objectives, or irrelevant, outdated objectives;
- (b) neglect of certain key tasks;
- (c) decision making unnecessarily complicated;
- (d) redundant levels of management, due to changes in operations, not yet reflected in the structure;

- (e) reporting relationships not clear;
- (f) confusion as to allocation of task responsibilities;
- (g) excess of irrelevant paperwork;
- (h) misuse of skilled staff on unskilled work;
- (i) no function exists for planning the long term future of the business itself, and the organization changes needed for that future.

Brech, p. 157-159 presents an even more detailed list of common weaknesses found in organizations.

4.2 Developing the ideal organization

Once the deficiencies of the present organization have been identified, the next step is to plan the ideal organization structure. This is done by considering the company's major goals, long- and short-term, the types of work that will be needed to meet them, and the overall situation of the company and its environment. Of course, the ideal structure should correct the deficiencies of the present structure.

The analysis of interviews, questionnaires, and data from all available sources will lead to the identification of the tasks necessary to be performed and of the roles (or positions) in the organization. One method of matching tasks with roles is the Linear Responsibility Chart in which arranged along the upper edge are all the roles in the management and staff being reviewed; down the left hand vertical axis are plotted all the tasks. In the squares of the body of the matrix can be entered symbols to show which roles have a responsibility of one kind or another for each task (Fig. 3).

LINEAR RESPONSIBILITY CHART (EXCERPTS)

				PRESIDENT			FINANCE		
	Board of Directors	President	Assistant to President	Director - Public Relations	Vice President - Finance	Director - Accounting	Director - Treasury Dept.	Vice President - Marketing	
Establish overall company objectives	1	X	7		5			5	
Approve overall company plans	1	X	6	6	5			5	
Direct overall operations	1	X			7			7	
Approve company expansion plans	1	X		6	5			5	
Control public relations	1	X		5					
Coordinate line and staff departments	1	X	7		5			5	
Assist president in administrative routine		2	X						
Conduct organization studies		1	X		5			5	

Fig. 3 (Source: [8], p. 218)

More complex matrices can be set up for different offices, departments, or divisions as shown in the chart (see Fig. 4) drawn for a division of the Lockheed Aircraft Corporation (Dale (1967), p. 220).

There are still other techniques for sorting and summarizing information to enable the organizer to put together job descriptions and to systemtize the assignment of tasks to departments. Many of these are described in Kemball-Cook, Chap. 6-11; Chap. 10 of the book presents four case studies of reorganization.

The work of those who handle the mechanics of the job concludes with a report and recommendations. A classic example of an organization report is that prepared by Alfred P. Sloan, Jr., and his associates at General Motors (reprinted in Ernest Dale - editor -, Readings in Management: Landmarks

LOCKHEED AIRCRAFT CORPORATION
MISSILE SYSTEMS DIVISION—PRODUCT PLANNING BRANCH
PLANNING FUNCTIONS, TYPE AND EXTENT OF ACTIVITY, AND ORGANIZATIONAL RELATIONSHIPS
AUGUST 1957

FUNCTION	TYPE AND EXTENT OF ACTIVITY						LMSD AND OTHER ORGANIZATIONS PARTICIPATING IN FUNCTION													
	Directs or Performs Job Itself	Works with Others	Coordinates	Evaluates	Liaison	Participates	General Manager	Asst. General Manager (Planning and Control)	Asst. General Manager (Research and Development)	Asst. General Manager (Operations)	Finance Branch	Sales Branch	Mfg. Branch	Weapons Systems Branch	Org. Pl. Branch	R & D. Branch	Other Divisions	LMSD Committees	Central Corporate Offices	Outside Consultants and Agencies
(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)	(10)	(11)	(12)	(13)	(14)	(15)	(16)	(17)	(18)	(19)	(20)	(21)
I. PREPARING RECOMMENDATIONS FOR TOP MANAGEMENT ON LONG RANGE GOALS, PROGRAM OBJECTIVES AND RESOURCE ALLOCATIONS																				
A. Management-Planning Policies and Objectives																				
1. Lockheed master planning		(1)	(1)	(1)	(1)		X	X	X	X	X	X	X	X	X	X	X	X	X	X
2. LM&O operational planning		(1)	(1)	(1)	(1)		X	X	X	X	X	X	X	X	X	X	X	X	X	X
B. Product Expansion Policy																				
1. New products within LM&O authority:																				
- commercial	(1)	(1)	(1)	(1)	(1)	(1) (2)	X	X	X	X	X	X	X	X	X	X	X	X	X	X
- military	(1)	(1)	(1) (4)	(1)	(1)	(1) (2)	X	X	X	X	X	X	X	X	X	X	X	X	X	X
2. New products presently outside LM&O authority	(1)	(1)	(1) (4)	(1)	(1)	(1) (2)	X	X	X	X	X	X	X	X	X	X	X	X	X	X
3. Subcontracting policy	(1)	(1)	(1) (4)	(1)	(1)	(1) (2)	X	X	X	X	X	X	X	X	X	X	X	X	X	X
C. Relationships between LM&O and Central Corporation:																				
1. New corporate product development	(1)	(1)	(1)	(1)	(1)		X	X	X	X	X	X	X	X	X	X	X	X	X	X
2. Division product development plans	(1)	(1)	(1)	(1)	(1)		X	X	X	X	X	X	X	X	X	X	X	X	X	X
3. Division resource availabilities	(1)	(1)	(1)	(1)	(1)		X	X	X	X	X	X	X	X	X	X	X	X	X	X
D. LM&O Resource Utilization Policy																				
1. Facilities in relation to program																				
2. Internal manpower scheduling	(1)	(1)	(1)	(1)	(1) (4)	(2)	X	X	X	X	X	X	X	X	X	X	X	X	X	X
3. Inventory policy				(1)	(1)	(1)	X	X	X	X	X	X	X	X	X	X	X	X	X	X
4. Outside production policy				(1) (2)	(1)	(1)	X	X	X	X	X	X	X	X	X	X	X	X	X	X
E. Short-Range Financial Program Planning																				
II. SERVING AS A CENTER FOR FORECASTING ENVIRONMENTAL CONDITIONS AS BASES FOR PLANNING																				
A. Developing Broad Environmental Trends and Forecasts																				
1. Basic political, economic, and military trends		(1)		(1)	(1)	(4)		X			X	X						X	X	X
2. Military missile expenditures	(1)	(1)		(1)	(1)	(4)		X			X	X						X	X	X
3. Customer procurement policies	(1)	(1)		(1)	(1)	(4)		X			X	X						X	X	X
4. LM&O competitive environment	(1)	(1)		(1)	(1)	(4)		X			X	X						X	X	X
5. Market conditions for new products	(1)	(1)		(1)	(1)	(4)		X			X	X						X	X	X
B. Establishing Basic Assumptions for Planning:																				
1. Quarterly forecasts of operations																				
2. Five-year financial forecasts						(2)		X			X	X								
3. Annual budgets						(2)		X			X	X								
4. LM&O operating plans	(1)	(1)	(1)	(1)		(4)		X			X	X								
III. PREPARING PLANS TO REACH OBJECTIVES																				
A. New Product Development																				
1. Strategy for preferred areas																				
2. Measuring new ideas against policy	(1)	(1)	(1) (4)	(1)	(1)	(4)	X	X	X	X	X	X	X	X	X	X	X	X	X	X
3. Screening for final recommendation	(1)	(1)	(1) (4)	(1)	(1)	(4)	X	X	X	X	X	X	X	X	X	X	X	X	X	X
4. Evaluating results	(1)	(1)	(1) (4)	(1)	(1)	(4)	X	X	X	X	X	X	X	X	X	X	X	X	X	X
B. Abandoning Present Product Lines																				
C. Quarterly, Semi-Annual, Annual, and 5-Year Financial Forecasts																				
D. LM&O Operating Plans																				
1. Laying basic assumptions																				
2. Preparing basic data	(1)	(1)	(1)	(1)			X	X	X	X	X	X	X	X	X	X	X	X	X	X
- environmental forecasts		(1)	(1)	(1)						X	X							X	X	
- physical facilities		(1)	(1)	(1)						X	X							X	X	
- financial data		(1)	(1)	(1)						X	X							X	X	
- technical data		(1)	(1)	(1)						X	X							X	X	
- manpower data		(1)	(1)	(1)						X	X							X	X	
- personnel data		(1)	(1)	(1)						X	X							X	X	
- sales data		(1)	(1)	(1)						X	X							X	X	
- other		(1)	(1)	(1)						X	X							X	X	
3. Evaluation of data	(1)	(1)	(1)	(1)			X	X	X	X	X							X	X	
4. Choosing among alternatives	(1)	(1)	(1)	(1)			X	X	X	X	X							X	X	
5. Recommending action	(1)	(1)	(1)	(1)			X	X	X	X	X							X	X	
IV. EVALUATING OPERATIONS AGAINST PLANS AND OBJECTIVES																				
A. New Product Operations																				
1. Against basic policy and objectives																				
2. Against plans established for them	(1)						X	X	X	X	X							X	X	
3. Against LM&O resource capabilities	(1)						X	X	X	X	X							X	X	
B. Resource Utilization																				
1. Physical facilities																				
2. Product schedules	(1)		(1)				X	X	X	X	X							X	X	
3. Manpower	(1)		(1)				X	X	X	X	X							X	X	
4. Inventory		(1)	(4)				X	X	X	X	X							X	X	
5. Financial		(1)	(4)				X	X	X	X	X							X	X	
6. Management availability	(1)		(4)				X	X	X	X	X							X	X	
C. Special Reports																				
1. Performance measurement methods																				
2. New procedures to assure performance in conformance with plans and objectives	(1)	(1)					X	X	X	X	X							X	X	
V. MAINTAINING GENERAL MANAGER CHART ROOM																				
	(1)	(1)					X	X	X	X	X							X	X	

LEGEND

Directs or Performs Job Itself: to give orders or instructions.
Works with Others: to act as a principal in collecting information and data from other offices and organizational units. This activity varies from formal "task force" arrangements to informal cooperative efforts. The "team approach" was found to be effective and essential in completing a number of planning operations.
Coordinates: to bring into a common action the work of personnel in other Branches to achieve a given objective, to unite work of other Branches into a unified whole to achieve a given objective.

Evaluates: to review or appraise action or performance
Liaison: to establish a bond or connecting link with other organizations to establish a special channel of communications.
Participates: to share a given task in common with others.

- (1) Product Planning Branch initiates action (does not necessarily mean exclusively).
- (2) Product Planning Branch participates in action initiated by others.
- (3) Product Planning Branch reviews and evaluates work performed by others.
- (4) Product Planning Branch action is requested by others.

Fig. 4 (Source: [8], p. 220)

and New Frontiers, McGraw-Hill, New York, 1965, pp. 215-219).

In general, the table of contents of an organization report might read as follows:

(1) Objectives of the study.

(2) Basic company characteristics. This section may cover the production process, the manner of selling, recent changes in marketing and distribution, and the prospects and implications of further growth.

(3) An appraisal of the present organization. This might include the present organization chart, a summary of the major responsibilities of the principal executives, and a description of the principal shortcomings found, such as inadequate help from the board of directors, overloading of top management, lack of unity of command, lack of coordination among purchasing, warehousing, inventorying and transportation, or inadequate control.

(4) Principal recommendations for organization improvement. This section should cover the changes recommended, with charts and tentative job descriptions for the principal positions.

(5) Recommendations on installation of the plan.

(6) Other opportunities for improvement, such as sales improvement, inventory control, long-range planning, a rationalized salary program, an appraisal and incentive system, and more flexible controls.

The report is to be discussed first with the chief executive or whoever has sponsored the study; any necessary changes should be made and further discussions held with other executives if the sponsor agrees. This is an extremely delicate aspect of the reorganization process because one cannot hope to please everybody. However, the major objections should be ascertained

and it must be determined to what extent they are based on logical grounds.

The "ideal" organization developed as described above should not be implemented immediately, even if this were possible. Indeed, if a major reorganization is planned it would usually require such profound changes that personal relationships would be destroyed or gravely harmed; often, a serious disruption of morale might result. The main problems the organizer should be aware of are:

(1) The instinctive individual reaction to any change in organization is the thought that it poses a threat to security - sometimes as a direct threat to the tenure of one's job, always as a threat to status and chances of promotion. It is entirely rational to have doubts as to one's suitability for an unfamiliar role.

(2) Taking away some of the functions a man has been performing may be interpreted as a demotion even if no loss of status or pay were associated with his job restructuring.

(3) Any change, if imposed from outside one's working group, may be interpreted as a criticism of the current performance, and will be resented.

(4) There is an anxiety that a stranger to a department (consultant from outside, or a member of a top management group) cannot really understand all the details of the department's operations, and that a new organization will be unworkable.

(5) The learning of new habits of work, required by a new role, will be doubly difficult because first the unlearning of old habits of work and behavior should take place.

(6) The new structure and roles will probably lead to the dissolving of some working groups and to the disruption of informal groups. This is likely to elicit resistance to change on the part of these groups.

These fears or stresses are real, and cannot be entirely relieved by wise treatment, but the strain can be rendered acceptable by common sense and consideration. Thus, setting new opportunities for developing new skills and giving wider scope and recognition of proven abilities would alleviate the felt threat to security and the fear of criticism. Against the difficulty of unlearning habits can be set programs of retraining, and the provision of as much time as is possible, to allow the pace of change to be acceptable. Suspicion of the ignorant stranger should be counterbalanced by consultation and explanation of the reasons for the changes and of the stranger's role.

It is exceedingly important that those subject to the studies and changes be fully involved in the analysis and implementation. This involvement will be manifest in the preliminary announcement of the purpose and methods of the analysis; then, the interviews will provide ideal opportunity for the organizer to explain the analysis and to make personal contact with each individual. At every stage of the reorganization program, therefore, there is a need for good leadership by those responsible for the project.

Dale (1967), Chap. 14, recommends that both a long-range plan and a short-range plan be set up. The short-range plan should attempt to remedy or alleviate some of the most serious and pressing difficulties that the study has pointed out. The way from the short-range plan to the long-range plan certainly needs to be prepared. This essentially involves the preparation of a long-range manpower policy with provision for executive education and promotion.

Some changes will, of course, have to be undertaken regardless of opposition. But, except when the deficiencies are grave, gradualism is always preferable to hasty action.

4.3 Who should handle the mechanics of reorganization?

The mechanics of a major reorganization are time consuming: gathering information on the present organization through questionnaires and interviews, determining the possible ways in which the objectives of the reorganization may be met, drawing the charts, and preparing the manuals.

If the company has an organization specialist or an organization department, he or it will generally handle the mechanics.

Where there is no organization department, the function is generally assigned to one of the other departments or to a committee. Dale (1967), Chap. 13) reports that a survey conducted by the American Management Association showed that in some large companies without organization departments the substitute arrangements were as follows:

- "- handled by administrative staff;
- performed by administrative assistant to the president;
- performed by a committee reporting to the board of directors;
- handled by the corporate personnel department;
- responsibility in hands of the line managers."

In smaller firms the controller or treasurer or the industrial relations director, or an assistant to the chief executive may handle the mechanics of reorganization in addition to their duties.

A possibility is to organize a task force including the heads of major functions under the direction of the chief executive. Although these task forces have the advantage of bringing together much expertise and a good knowledge of the current organization, as well as the advantage of inducing cooperation on the part of the participating executives, the existence of really big power struggles and the continuous lack of executive spare time might make this approach infeasible or unwise.

It is suggested that, where the company is large and no organization department exists, the chief executive should take complete responsibility for the changes and supervise the job with assistance only from staff groups or consultants.

Outside consultant(s) may be used to either supplement the company organization department or, more commonly, to assist the company president, some other executives, or perhaps a committee with the reorganization job. Consultants present the advantage of high expertise and objectivity with respect to possible power struggles, but they may be handicapped by unfamiliarity with the industry and the company.

The implementation work need not involve the analyst team but can be assigned to managers and staffs themselves; thus the personnel department may be responsible for the training and relocation of staff whose roles are changed, while the organization department can undertake the design of new forms and procedures. The top management and the department heads, supported by the analyst, will of course be directly responsible for explaining the changes and their consequences to all members of the organization who are not already familiar with the proposals through personal involvement. The role of the analyst is likely therefore to be a part time servicing role, advising and monitoring rather than executing the implementation work himself.

In addition to the general procedure outline in this report, in developing the ideal organization particular attention should be paid to the experience of other companies that have adopted various forms of organization - both overall and for specific departments. This comparative approach is valuable, for often some other company has already solved some of the problems the organizer is confronting. In this sense, the following books can prove beneficial to the organizer:

- Johannsen - is a collection of annotated organizational charts.
- White - the first part of the book contains brief discussions of theoretical issues; the second part presents organization charts for different companies, and explanations.
- Chandler (1962) - the history and structure of Du Pont, General Motors, Standard Oil Company (New Jersey), Sears, Roebuck and Co.

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Test Questions about the

Principles to be checked, and problems to be resolved

Objectives 1.1 Are all objectives linked in a logical structure, contributing to a valid corporate goal?

1.2 Have all the key tasks needed to accomplish the objective been identified?

2.1 Have all the key tasks been properly allocated to appropriate roles, and is responsibility for them clearly designated?

2.2 What are the other responsibilities – supervisory, consultative, co-operative of other roles for the key tasks?

2.3 How are the subsidiary tasks allocated to roles?

2.4 Can decisions required for tasks be simplified?

2.5 Do the tasks allocated in a role make a rational compatible group?

Roles 3.1 Is the hierarchical or other reporting structure clearly defined?

3.2 How is the total responsibility allocated – to a single chief executive or to more? Has he/they the appropriate task responsibilities?

3.3 Do the principal functions report to the top level?

3.4 Are there clear lines of responsibility from each role through to the Chief Executive?

3.5 If lines of responsibility branch and unite at a role, are the two separate reporting responsibilities clearly defined, and understood by the person occupying the role?

3.6 Is the number of management levels appropriate to the size and complexity of the business?

3.7 Is the span of control of each manager appropriate to relevant factors?

3.8 Is the work load of each manager appropriate?

3.9 What is the decision level of each role? Do decision levels of different tasks in same role vary widely?

3.10 What are the problems areas in the key tasks?

Where several roles are involved, in a task (i.e. project teams, committees, other co-operative tasks):

4.1 Is there a logical reason for the shared responsibility?

4.2 Are the responsibilities of each member clearly defined?

4.3 Is there a recognized leader, with clear reporting responsibility?

4.4 Are relations with other functions satisfactory?

4.5 Is time spent on committee attendance reasonable?

Skills 5.1 Are tasks requiring special skills or qualifications performed by suitable staff?

Organization and how to Answer them

Method of checking

From the Statement of Company Objectives (Appendix II) and interview record sheets draw up lists of company and functional objectives, grouped into logical 'decimal' structure.

From interview sheets, list key tasks against objectives; check against lists compiled for same functions in similar business or industry.

Check matching on Roles-Tasks Matrix.

Enter codings onto Roles-Tasks Matrix.

Check those tasks with high decision levels, recorded as unprogrammed (coded JCD on interview sheets).

Compare the tasks within each role.

Check lines of reporting on Roles-Tasks Matrix; check discrepancies in statements made as to their reporting relationships by managers and their subordinates.

Check how the tasks which are normally the responsibility of the Chief Executive are distributed.

Check on formal organization chart.

Check on Roles-Tasks Matrix.

Check on supplementary interview notes; dual reporting should be noted during interview, and investigated.

Check number of levels against standards given (Chapter 7, p. 92), examine validity of reasons for divergence.

Identify critical factor limiting span of control and consider if actual span is appropriate (Chapter 2, p. 29).

Check validity of percentage of time stated for each task, and total the percentage for all tasks covering each role. Consider whether direct observation studies or diary keeping are needed.

Check on Roles-Tasks Matrix or computer summary.

Check on interview record sheets and supplementary interview notes.

Identify such Task Groups during interview, and by study of Roles-Tasks Matrix make further study by interviews as necessary.

Check times spent on summary of meetings, questionnaires.

Check on interview sheets by comparing task skills required with skills possessed by role occupant.

	Principles to be checked, and problems to be resolved	Method of checking
<i>Skills (continued)</i>	5.2 Are specialist or qualified staff using their skills on appropriate tasks?	
	5.3 If specialists are organized in specialist functions, are they readily available to operating managers at the appropriate levels? Where are the cross-over managers?	Identify tasks requiring specialist service; check availability on Roles-Tasks Matrix or by special computer summary.
<i>Responsibility and authority</i>	6.1 Are decisions in key tasks delegated close to level of action?	Check whether decisions are made at levels too high above execution level; check through interview record sheets, comparing decision levels against role levels.
	6.2 Does each manager have control of necessary resources?	Check notes on interview record sheets and supplementary interview notes.
<i>Control information</i>	7.1 Is each objective/key task supported by control reports registering achievement of task?	Check on interview record sheets or on summary of documents analysed by role.
	7.2 Are frequency and detail of control reports appropriate to degree of authority delegated?	Check distribution of Document Level against Role Level.
<i>Management appraisal and succession</i>	8.1 Is capacity of each manager appropriate to the decision level of his role?	Prepare organization chart, showing for each management position: title of role, decision level for role, name of occupant, retiral date, estimate of performance and potential, name of deputy; check availability of adequate staff in next 5, 10 years.
	8.2 Has each main role a trained deputy available?	
	8.3 What are future staff needs to meet retirements, wastage, growth?	
	8.4 Are there adequate staff with potential to meet needs?	
<i>General</i>	9.1 What is the stability of products, markets, process technology, labour, unions, etc.?	Summarize stability from background information and from interview record sheets; compare flexibility of structure shown by past record or adaptation, and attitudes of staff.
	9.2 Is the organization structure flexible enough to adapt to rate of change in above?	Check background information, corporate plans, departmental plans and supplementary interview notes, to identify important changes.
	9.3 Are there particular changes foreseen in any of the above areas which may significantly affect the organization structure?	Appraise strengths and weaknesses of individual staff, and assess present and appropriate effect on structure.
	9.4 What are effects of particular personalities on the organization?	From background information and supplementary interview notes, find out the events which may affect timing of changes and the practical rate of change of the desired structure.
	9.5 What factors will influence programming of changes to desired organization structure?	

Note: The Roles-Tasks Matrix is another term used for the Linear Responsibility Chart (see page 26).

BASEMENT

Date Due

<p>SEPT 21 1988</p>	<p>SE 08 '88 OCT 21 '88</p>	
<p>JUL 1 1 1988</p>	<p>NOV 24 1989</p>	
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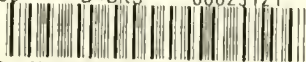
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