

Lord Foundation Proposal:

“California Theory Workshop on Organizations and Organizing”

(1) Organizers: Names of all Marshall faculty who have committed to helping organize the workshop:
Paul Adler, Tom Cummings, Peer Fiss, Shon Hiatt, Lori Yue (in alphabetical order)

(2) Name of the workshop and its intended audience: California Theory Workshop on Organizations and Organizing.

This workshop will be the third in a series: Marshall (with Lord Foundation support) launched the series in 2015. UC Santa Barbara hosted and funded the second in 2016. In 2017 we hope to bring it back to Marshall.

The workshop is intended to further the investigation of the role of the corporation in contemporary society. Corporations and market-based competition among them are the primary wealth-producing mechanisms in contemporary society, but multiple strands of scholarship have explored a variety of other roles played by corporations and other ways of producing wealth. For instance:

- Corporations are not only in competition with each other; they sometimes cooperate.
- The corporation’s role is, in reality, not restricted to wealth-production; those efforts generate externalities, both positive and negative.
- Corporations are oriented primarily by investors’ expectations of profitability and growth; but other stakeholders’ expectations also influence corporate behavior.
- The context of corporations’ conduct and the constraints under which they make their choices is also shaped by social movements and government.
- Corporations do not only pursue their goals within given competitive, social, and legal conditions: they often act to change those conditions.
- The centrality of the corporation in wealth-generation is being challenged by alternative forms of organization such as social as well as inter-organizational networks and cooperatives.
- Corporations have been central to many work careers, but that relationship is changing with the proliferation of a free-lance/contracting model and career paths that cross multiple corporations.

This workshop aims to bring together both senior and junior scholars interested in these issues. We have had great success in the past two years with a focus on California scholars, attracting attendees from all the major universities in the region including Stanford, Berkeley, UCLA, UC Irvine, UC Santa Barbara, UC San Diego, Santa Clara University. We’ve also had attendees from Harvard, Northwestern, NYU, Wharton, and Michigan.

The goal is a highly interactive workshop. There are many small workshops where faculty present research papers, but very few opportunities for extended discussion on topics of shared interest. This interactive format proved highly popular and effective in the previous two years (.

(3) Proposed dates: Sept 21-23, 2017

(4) Approximate expected number of attendees: 30-40

(5) Requested amount of funds and uses:

Funds would be used to cover food and facilities, plus travel for two out-of-state invitees. The organizing faculty, working with the MOR department staff, will handle most of the administrative aspects.

This event’s budget is around \$11,800. Our estimate is based on past workshops of this kind.

Catering	\$8,000.00	(Breakfast, lunch, dinner) x 2
Snacks	\$300.00	
Admin (name tags, printing, etc.)	\$500.00	
2 special invitees from outside CA	\$3,000.00	
TOTAL	\$11,800.00	

(6) Intended mechanism for covering remaining costs:

We intend to scale the cost to fit the budget. MOR has access to limited endowed funds from the Bennis Festschrift and from the Leadership Institute to supplement whatever we can get from Lord Foundation.

(7) Any other relevant information such as whether the department has successfully run similar workshops in the past, whether the workshop has any intended additional purpose such as recruiting faculty etc.

Our goal for this event is to help to move MOR and Marshall higher in our peers’ reputational rankings. Our recruiting over the previous few years has brought to the department an extraordinarily talented group of junior scholars, and we hear numerous comments from colleagues elsewhere that this has not gone unnoticed. Our senior-scholar searches have also generated positive word-of-mouth. This workshop would consolidate and magnify these reputation-building efforts. Boosting our reputation will facilitate recruiting top faculty talent and also add to our ability to recruit high-potential PhD students.

Proposed structure/agenda

September 21, 2017

4:00 – 8:00 Getting Acquainted Session & Dinner

September 22, 2017

7:30 - 8:30 am Breakfast
8:30 - 9:00 am Welcome & Introduction
9:15 - 10:45 am Provocation Presentation
11:00 - 12:30 pm Discussion Sessions
12:30 - 1:30 pm Lunch
1:30 - 2:30 pm Provocation Presentation
2:45 - 4:15 pm Discussion Sessions
4:30 - 5:30 pm Learning from Today
5:30-8 pm Reception & Dinner

September 23, 2017

7:30 - 8:30 am Breakfast
8:30 - 9:00 am Provocation Presentation
9:15 - 10:45 am Breakout Sessions
11:00 - 12:30 pm Looking Back/Looking Forward
12:30 - 1:30 pm Lunch