

# James L. Ritchie-Dunham

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## EDUCATION

- Ph.D.**            May 2002            University of Texas at Austin  
Department of Management Science and Information Systems  
Major: Decision Sciences  
Minor: Information Systems
- Dissertation:* Balanced Scorecards, Mental Models, and Organizational Performance.  
Committee members: James Dyer (Chair), Edward Anderson, Fred Davis, Sirkka Jarvenpaa, Douglas Morrice.
- MIM/MBA** June 1991            Dual degree with Thunderbird, The Garvin School of International Management, Glendale, Arizona, and Escuela Superior de Administración y Dirección de Empresas (ESADE), Barcelona, Spain.
- B.S.**                December 1988            University of Tulsa, Petroleum Engineering, Tulsa, Oklahoma  
Universidad Complutense, Madrid, Spain, Minor in Spanish Literature.

## CURRENT RESEARCH

*Project:* Thinking Clearly within Complex Social Systems

*Research Team:* Jim Ritchie-Dunham (PI), John S. Carroll, Fred D. Davis, Ellen J. Langer, R. Scott Spann, Steve Waddell

*Research Focus:* This project builds on previous mental model research on complex, multi-stakeholder social systems. Of particular interest is the correspondence of these mental models to “reality,” the technologies and processes that influence that correspondence, and the effects of that correspondence on social system performance.

*Broader Impacts:* The focus is on helping CARE, the \$512 million/year international aid agency, and its network of stakeholders more clearly understand and work with the underlying structures that continuously re-create poverty, providing them clear tools and processes for involving and communicating with affected communities and stakeholders.

*Funding Support:* CARE and the Institute for Strategic Clarity.

## INTERESTS

- Research** Mindful mental models, systemic thinking within strategic decision making, collaborative systems thinking, balanced resource structuring theory.
- Teaching** Strategic decision making, systemic strategy, towards an understanding of the three-fold social order, decision sciences, systems thinking and organizational learning, policy modeling with system dynamics.

## WORK EXPERIENCE

**Associate** 9/04 – present **Harvard University**  
Faculty of Arts and Sciences, Psychology Department.  
Cambridge, MA. <http://www.people.fas.harvard.edu/~jritchie/>

**President and Chief Strategist** 8/96 – present **Institute for Strategic Clarity**  
Wilton, NH. <http://www.instituteforstrategicclarity.org/>  
A non-profit 501(c)(3) scientific research and educational organization.

Focus: Through participatory processes and systemic methodologies, we build and enhance the capacity of people and organizations to address complex societal issues and realize their highest aspirations for a greater social good.

Membership: 22 academics, practitioners, and consultants.

**Affiliations** **The Barfield School**  
Amherst, MA. <http://www.barfieldschool.org/>  
Faculty (3/04 – present)

**Global Action Network Net**  
Boston, MA <http://www.gan-net.net/>  
Associate (9/03 – present)

Executive education courses and guest lectures.

- Canada A.T. Kearney (1996-1997)
- Costa Rica The Wal-Mart Phenomenon, Competitive Retailing (2003)
- Germany Hochschule fur Musik/Bauhaus University, Strategic Thinking for Cultural Institutions (1998)
- Japan isee systems, Strategic Systems Thinking with Stella/ithink (2004)
- Mexico ITESM, Ex-TEC Seminar (2005); ITESM, Lecture in Strategic Management Seminar (2004); ITESM (Ciudad de Mexico), MBA in Strategic Decision Making (2003); ITAM (Mexico City), MBA in Strategic Decision Making (2003); Diplomado in Strategic

- Planning (1996-2003); Executive short course on Policy Modeling for Peñoles (1996, 1999), Pemex (1996), Comisión Nacional de Agua (2000)
- The Netherlands Royal Dutch/Shell, Action Learning group, Group Planning group, Production System Optimization group, Policy Modeling workshops (1997-1998)
  - UK A.T. Kearney Center of Excellence; A.T. Kearney/Rolls Royce, system dynamics modeling for policy (1996-1997)
  - USA George Washington University School of Public Administration (2005-2006); Global Environmental Management Initiative (2006); Boston University School of Management Business Dynamics Class (2003); University of Arkansas Sam M. Walton College of Business Emerging Leaders Program (2003); University of Texas at Austin, MBA class in Operations Management (1998-2000); Sandia Labs, Nuclear Strategies Workshop, directors of national labs on influencing policy makers with models (2000); TXU, Executive development in policy modeling (1998-2000); Balanced Scorecard Collaborative conference (1999); Antibiotic Resistance Judicious Use committee of deans of leading medical schools on a systemic approach to antibiotic policy (2000, 1998)
  - Venezuela Petróleos de Venezuela (PDVSA) (1997-2000)
- Doctoral seminar The Balanced Scorecard: An Information Systems Approach. Co-designed and co-taught with James Dyer at UT-Austin, S2000.
- Chairman** 5/97 - present **Strategic Clarity**  
Boston and Mexico City <http://www.strategic-clarity.com/>
- Focus: Developing client's ability to think systemically about strategic issues. Provide consulting and advising services to Global Fortune 1000 firms and governmental agencies.
- Major Clients:
- A.T. Kearney/EDS and their clients in telecommunications, financial services, and aerospace
  - Boehringer Mannheim
  - CARE
  - Delta-R, oilfield reserves services startup
  - Dynamic I-T, distance learning
  - Grupo Bal
  - Intel
  - National Security Agency
  - Peñoles, mining and metallurgy
  - Petróleos de Venezuela (PDVSA)

- Petróleos Mexicanos (PEMEX)
- Pfizer Health Solutions
- Royal Dutch/Shell
- Secretariat of Health, Mexican federal government
- Society for Organizational Learning
- Texas Department of Health, Infectious Disease Epidemiology and Surveillance Division
- THOR•LO
- Town of Vail
- TXU, formerly Texas Utilities
- Vancouver Fire and Security

<b>Visiting Scholar</b>	7/03 – 6/04	<b>Massachusetts Institute of Technology</b> Sloan School of Management, Organization Studies Group Cambridge, MA. <a href="http://mitsloan.mit.edu/osg/">http://mitsloan.mit.edu/osg/</a> .
<b>Professor</b>	6/93 - 8/96	<b>Instituto Tecnológico Autónomo de México (ITAM)</b> Mexico City, Mexico. <a href="http://www.itam.mx/">http://www.itam.mx/</a> <i>Taught:</i> BBA, MBA, Executive Education <i>Coordinated:</i> Decision Sciences area (1995-1996), International Business area (1994-1995), 40 undergraduate and 3 graduate thesis projects, Omega Rho International Student Honor Society (INFORMS) founding faculty advisor
<b>Petroleum Engineer</b>	5/90-2/93	<b>Conoco (Du Pont)</b> New Orleans, LA; Ponca City, OK <a href="http://www.conoco.com/">http://www.conoco.com/</a> Reservoir management engineering and transportation project engineering. Completed management development program. On educational leave of absence 10/90 – 6/91.

## SERVICE

### Board of Trustees

- THOR•LO, 2005-present
- Mabry Oil and Gas Systems, 2004-present
- Wimberley Art Institute, 2004-present
- Pine Hill Waldorf School, 2003-present
- Society for Organizational Learning, 2002-2004
- Dynamic I-T (L-earnbiz.com), distance learning, 2001-2003

### Advisory Board

- ACP University, 2001-2003
- A.T. Kearney Integrated Strategic Measures Practice, 1997-1998

### **Academic Societies**

- *Reviewer for Journals:* IEEE Transactions on Systems, Man and Cybernetics; Health Care Management Science; Interfaces; MIS Quarterly; Reflections; Information Resources Management Journal
- *Reviewer for Books:* Critical Reflections on Information Systems: A Systemic Perspective; John Wiley & Sons
- *Reviewer for Conferences:* Academy of Management Annual Meeting 2003-2006 (BPS, OTM, MOC); International Conference on Information Systems 1999; System Dynamics Society International Conference 2000-2006
- *Invited Session Chair:* Academy of Management 2003 Annual Meeting (BPS); INFORMS San Antonio 2000 (Decision Analysis)

### **GRANTS AND HONORS**

- University of Texas at Austin MSIS Department Fellowship, 2001-2002.
- Dana Meadows Award - Honorable Mention for Student Paper Contest of the System Dynamics Society, July 2001.
- SAP 2000 University Alliance Curriculum Development grant for "A strategic supply chain simulation game: learning first-hand about the value of SAP's ERP and SEM systems." Co-authors: Edward Anderson, Douglas Morrice, Elliot Paull, Michael Puleo, Judy Scott. \$75,000.
- Phi Kappa Phi, National Honor Society.
- W.W. Cooper Fellowship, 1996-1997.

### **MEMBERSHIPS**

- Academy of Management
- American Psychological Association
- Institute for Operations Research and Management Science
- Society for Organizational Learning
- Society for Judgment and Decision Making
- Society of Petroleum Engineers
- System Dynamics Society

### **LANGUAGES**

- **English**, native
- **Spanish**, bilingual in both written and spoken

- **Catalan**, proficient

## **PUBLICATIONS**

### **Refereed Articles and Books**

*Thinking Clearly within Complex Social Systems*, Burlington: Elsevier, forthcoming.

*An Integral Understanding of the Collaborative System Dynamics of Poverty in Guatemala*, Atlanta: CARE, forthcoming.

Optimizing the Organizational Design of a Typical Upstream Exploration and Production Company, with Hal Rabbino and Cleon Dunham, *Journal of Petroleum Technology*, February, 2004.

Designing High-leverage Strategies and Tactics, with Nicholas Georgantzas, *Human Systems Management*, 22 (1), 2003.

*Managing from Clarity: Identifying, Aligning and Leveraging Strategic Resources*, Chichester: Wiley, 2001.

A Dynamic Theory of Antibiotic Resistance, with Jack Homer, Hal Rabbino, Luz Maria Puente, James Jorgensen, and Kate Hendricks. *System Dynamics Review*, Winter 2000.

Evaluating Epidemic Intervention Strategies with Systems Thinking: A Case Study of Dengue in Mexico, with Jorge Mendez Galvan; *System Dynamics Review*, Summer 1999.

*Technologies for the Competitive Mexican Industry: Quality Administration* (In Spanish), Mexico City: Editorial Iberoamericana, December 1996.

The Learning Organization in Decision Making in the Health Sector: The Case of Dengue, with Ortiz, Federico and Jorge Mendez; *Salud Pública*, November 1995.

System Dynamics in the Learning Organization, *Soluciones Avanzadas*, December 1994.

### **Invited Sessions in Proceedings**

Cognitive Processes in Dynamic Decision Support, Panel Session with Fred Davis, John Aloysius, Javier Lerch, and Michael Davern; Decision Sciences Institute, San Diego, CA, November 2002.

A Strategic Supply Chain Simulation Model, with Douglas Morrice, Edward Anderson, and Judy Scott, SAP Research and Applications Congress, San Diego, CA, February 2001.

A Strategic Supply Chain Simulation Model, with Douglas Morrice, Edward Anderson, and

Judy Scott, Winter Simulation Conference 2000, Orlando, FL, December 2000.

Information Relevance and Rigor as Antecedents to Strategic Clarity: Using SD to Test SAP's Strategic Enterprise Management Module with the Balanced Scorecard, in Operations Management Track, INFORMS San Antonio 2000, San Antonio, TX, November 2000.

### **Selected Proceedings and Other Publications**

A Framework for Achieving Clarity for You and Your Organization, *The Systems Thinker*, 15(7), September 2004.

Reconciling Local and Global Goals: A Systemic View of the Organizational Map, with Annabel Membrillo; *The Systems Thinker*, 11(2), March 2000. Also available in Spanish, Reconciliando las Metas Locales y Globales: Una Visión Sistémica del Mapa Organizacional, *El Pensador Sistémico*, 11(2), Marzo 2000.

Breaking Down Functional Blinders: A Systemic View of the Organizational Map, with Annabel Membrillo; *The Systems Thinker*, 10(10), December/January 1999. Also available in Spanish, Rompiendo las Divisiones Funcionales: Una Visión Sistémica del Mapa Organizacional, *El Pensador Sistémico*, 10(10), Dic/Ene 1999/2000.

Production System Optimisation: A Technical Focus, A Business Focus, with Cleon Dunham, and Keith Mutimer; *Exploration and Production News Letter*, Shell International Exploration and Production B.V., October 1999.

Combating Bureaucratic Decision Making with Systems Thinking at the Mexican Secretariat of Health, INFORMS, Washington, D.C. May 1996.

Systems Perspective for Combating Hemorrhaging Dengue, (In Spanish). General Assembly of the Mexican National Academy of Medicine, March 8, 1995.