

James L. Ritchie-Dunham

540 Abbot Hill Rd, Wilton, New Hampshire 03086

(603) 620-4472 c

(603) 654-5334 f

jimrd@instituteforstrategicclarity.org

http://www.instituteforstrategicclarity.org/

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 School of Global 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: Collaborative Holistic Inquiry in Guatemala

Research Team: Jim Ritchie-Dunham (co-steward), R. Scott Spann, Steve Waddell (co-steward)

Research Focus: Specification of societal collaborative, holistic inquiry, its antecedents and consequences, with multiple stakeholders across governments, corporations, civil society, and global action networks

Broader Impacts: Demonstration of: (1) the strategic probabilities in the seemingly impossible in societal collaboration; (2) the ability to hear and act with the voice of a broad, vulnerable collective, in deep conflict with its stakeholders; (3) the capacity of local leaders to lead these processes; and (4) the integration of efforts across global action networks.

Funding Support: CARE, GAN-Net, Institute for Strategic Clarity.

Project: Ecosynomics

Research Team: Sandy Hessler, Kimberly King, Jim Ritchie-Dunham (co-steward), Fred Simon (co-steward)

Research Focus: Identifying, elaborating, and testing the axioms of collaboration. Building on the foundations of economics, ecosynomics provides the axioms for collaboration. While recognizing the bigger interplay of the cultural, political, and economic spheres, ecosynomics focuses initially on the axioms that influence the primary agreements driving individuals today.

Broader Impacts: A world of harmonic stability, where people collaboratively contribute their unique gifts for the benefit of themselves and of the whole, is possible, within 40 years. It took humans only 75 years to pave the planet, one kilometer at a time. The task taken up here is to shift the fundamental axioms underpinning current primary individual and collective agreements.

Funding Support: Azima, Institute for Strategic Clarity.

Project: Mindfulness

Research Team: Jim Ritchie-Dunham (co-steward), Ellen J. Langer (co-steward), Michael Pirson

Research Focus: Re-integrating the mind and body, relating mindfulness to behavioral outcomes.

Broader Impacts: Clear link between mindful interventions and outcomes, in preventive foot health, everyday meetings, strategy processes, and developmental systems thinking

Funding Support: Growing Edge Partners, Harvard University, Institute for Strategic Clarity, Institute for Preventive Foot Health.

Project: Women's Empowerment through Microfinance

Research Team: Kimberly King (co-steward), Luz Maria Puente, Jim Ritchie-Dunham (co-steward)

Research Focus: Specification of "women's empowerment," its antecedents and consequences.

Broader Impacts: Discover the methods of microfinance that will most empower the 200 million women that will receive microfinance in the next 10 years.

Funding Support: Cleon and Jane Dunham Foundation, Institute for Strategic Clarity.

Project: Engaging Emergent Global Conversations

Research Team: Pieter Glasbergen, Kimberly King, Jim Ritchie-Dunham (co-steward), Steve Waddell (co-steward)

Research Focus: A key part of a global action network's work is to create conversations among stakeholders in an issue (e.g., water, forests, youth employment, corruption), to identify the issue as a common concern, develop joint understanding, and support a virtuous cycle of activities to address the issue. We are interviewing 20 GAN leaders, as the basis for exploratory conversations among global leaders, leading to a Clarity Forum on this topic.

Broader Impacts: Greater clarity about the power this new strategy has on its structure and governance, addressing questions such as: How does one engage a global conversation for action – recognizing it, making it explicit, engaging others in it, enacting it globally, and continuing to recognize it as it evolves? How do a GAN's structure, governance, and strategy nurture or debilitate its ability to steward the enactment of this evolving conversation?

Funding Support: Copernicus Institute for Sustainable Development and Innovation, GAN-Net, Institute for Strategic Clarity.

INTERESTS

Research Mindful mental models, systemic thinking within strategic decision making, collaborative holistic inquiry, ecosynomic theory.

Teaching Strategic decision making, systemic strategy, towards an understanding of the three-fold social order, mindfulness, policy modeling with system dynamics.

WORK EXPERIENCE

Managing Partner 8/07 – present

Growing Edge Partners

Harrisville, NH <http://www.growingedgepartners.com/>

Focus: Founded in 1979, GEP partners with executives to improve their companies' competitive advantage and to position them for long-term sustainable growth.

Clients Include:

- A.T. Kearney/EDS and their clients in telecommunications, financial services, and aerospace
- Boehringer Mannheim
- CARE
- Delta-R, oilfield reserves services startup
- GAN-Net, network of global action networks
- Global Business Network
- 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
- U.S. Agency for International Development
- Vancouver Fire and Security
- World Bank
- World Wildlife Fund

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: Social-scientific study of the agreements that guide human interaction.

Mission: 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.

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/>
Senior Steward (9/03 – present)

Executive education courses and guest lectures.

- Canada A.T. Kearney (1996-1997)
- Costa Rica The Wal-Mart Phenomenon, Competitive Retailing (2003)
- El Salvador CARE C.A. programmatic strategy sessions (2006, 2007)
- Germany Fachhochschule Eberswalde Sustainability as Strategic Foresight for 24th Chancellors of German Universities of Applied Sciences (2008); Hochschule fur Musik/Bauhaus University Strategic Thinking for Cultural Institutions (1998)
- Japan isee systems, Strategic Systems Thinking with Stella/ithink (2004)
- Mexico ITESM (Santa Fe) MBA (2008); CEMEX IMP—ITESM Seminar (2006); 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 and Diplomado in Strategic Planning (1996-2003); Peñoles executive short course on Policy Modeling (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)
	· Switzerland	GAN-Net Strategy, Structure, and Governance Community of Practice – Global Conversations for Action (2007)
	· UK	A.T. Kearney Center of Excellence; A.T. Kearney/Rolls Royce, system dynamics modeling for policy (1996-1997)
	· USA	Rotary 5 th National Poverty Conference (2006); National Association of Environmental, Health and Safety Managers, Savannah GA (2006); Global Environmental Management Initiative (2006); George Washington University School of Public Administration (2005-2006); University of Arkansas Sam M. Walton College of Business Emerging Leaders Program (2003); Boston University School of Management Business Dynamics Class (2003); UTexas Austin, Doctoral Seminar with Jim Dyer, The Balanced Scorecard: An Information Systems Approach (2000); Sandia Labs, Nuclear Strategies Workshop (2000); Antibiotic Resistance Judicious Use Committee (2000); Balanced Scorecard Collaborative conference (1999); TXU, Executive development in policy modeling (1998-2000); UTexas Austin, MBA class in Operations Management (1998-2000)
	· Venezuela	Petróleos de Venezuela (1997-2000)
Chairman	5/97 – 8/07	Strategic Clarity Boston and Mexico City Focus: Developing client's ability to think systemically about strategic issues. Provide consulting and advising services to Global Fortune 1000 firms and governmental agencies. Acquired by Growing Edge Partners.
Professor	6/93 - 8/96	Instituto Tecnológico Autónomo de México (ITAM) Mexico City, Mexico. http://www.itam.mx/ <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

**Petroleum
Engineer** 5/90-2/93

Conoco (Du Pont)

New Orleans, LA; Ponca City, OK <http://www.conoco.com/>
Reservoir management engineering and transportation project
engineering. Completed management development program. On
educational leave of absence 10/90 – 6/91.

SERVICE

Board of Trustees

- Dynamic I-T (L-earnbiz.com), distance learning, 2001-2003
- Modern Oil and Gas Systems, 2004-2008
- Pine Hill Waldorf School, 2003-present
- Society for Organizational Learning, 2002-2004
- THOR•LO, 2005-present
- Wimberley Art Institute, 2004-present

Advisory Board

- A.T. Kearney, Integrated Strategic Measures Practice, 1997-1998

Academic Societies

- *Invited Session Chair*: Academy of Management 2003 Annual Meeting (BPS); INFORMS San Antonio 2000 (Decision Analysis)
- *Reviewer for Books*: Wiley; Critical Reflections on Information Systems: A Systemic Perspective
- *Reviewer for Conferences*: Academy of Management Annual Meeting 2003-2008 (BPS, OTM, MOC); International Conference on Information Systems 1999; System Dynamics Society International Conference 2000-2008
- *Reviewer for Government Funding*: US AID
- *Reviewer for Journals*: Action Research; Health Care Management Science; Information Resources Management; IEEE Transactions on Systems, Man and Cybernetics; Interfaces; Journal of Management Spirituality and Religion; Management Decision; MIS Quarterly; Reflections; System Dynamics Review

GRANTS AND HONORS

- MIT Sloan School of Management, Organization Studies Group, Visiting Scholar, 2003-2004.
- 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 of Petroleum Engineers
- System Dynamics Society

LANGUAGES

- **English**, native
- **Spanish**, bilingual

PUBLICATIONS

Refereed Articles and Books

Social Systems Intelligence, Burlington: Elsevier, forthcoming.

Strategic Clarity: Actions for Identifying and Correcting Gaps in Mental Models, with Luz Maria Puente, *Long Range Planning* 41(5), 2008.

A Collaborative-Systemic Strategy Addressing the Dynamics of Poverty in Guatemala: Converting Seeming Impossibilities into Strategic Probabilities. In *Alleviating Poverty through Business Strategy*, edited by C. Wankel. New York: Palgrave Macmillan, 2008.

The End of Poverty ... The Beginning of Self-determination: An Integral Systemic Exploration of Poverty in Guatemala, Atlanta: CARE, 2007.

A Simulation Exercise to Illustrate the Impact of an Enterprise System on a Service Supply Chain, with Douglas Morrice, Edward Anderson, Jr., and James Dyer, *INFORMS Transactions on Education*, 7(3), 2007.

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

Shifting the Fundamental Dynamics of Poverty, with R. Scott Spann, *The Systems Thinker*, 19(7), October 2008.

Managing the Global to Local Paradox, with Hal T. Rabbino, *The Systems Thinker*, 17(6), August 2006.

The Four Truths of Clarity, *Reflections: The SoL Journal of Knowledge, Learning and Change*, 6(6/7), 2005.

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.