

## Résumé of Steve Waddell – MBA, Ph.D.

11 Arlington St., Boston, MA 02116 (617) 247-7836 swaddell@strategic-clarity.com

### Profile

- 20 years of experience in intersectoral (business-government-civil society) collaboration as an activist, a financial institution leader, academic, researcher and consultant.
- Widely published leading edge intersectoral concepts within the framework of “societal learning and change” which integrates individual-organizational-societal learning, change and development.
- Supported development of intersectoral concepts for USAID.
- Worked internationally, including in Brazil, South Africa, Guinea, Madagascar, India and the Philippines.
- Founder of many initiatives, including an executive management program at Boston College and the Global Action Network Net.

### Positions

- Position:** Senior Associate 2004 – present  
**Organization:** Strategic Clarity, Boston, MA  
Strategic Clarity focuses upon issues of strategy, collaboration, and systems thinking.  
**Web-Site:** <http://www.strategic-clarity.com>
- Position:** Founding Member 2003 - present  
**Organization:** Institute for Strategic Clarity  
This is a new Institute that studies how people make decisions in order to help them develop stronger, more rigorous decision strategies.  
**Web-Site:** <http://www.instituteforstrategicclarity.org>
- Position:** Senior Fellow 2003  
**Organization:** The Tellus Institute, Boston, MA  
Tellus focuses upon issues of sustainability and change.  
**Web-Site:** <http://www.tellus.org>
- Position:** Director 1999 – present  
**Organization:** The Collaboration Works, Organizational Futures, Providence, RI  
OF provides organization development-based education, consulting and research services.  
**Web-Site:** <http://www.thecollaborationworks.com>
- Position:** Lead Associate, Founder 2001 – present  
**Organization:** The Global Action Network Net (formerly the Global Public Policy Resource Group)  
The Group focuses upon development of knowledge and capacity with respect to the effectiveness of global action networks.  
**Web-Site:** <http://www.gan-net.net>
- Position:** Associate – Center for Innovation in Management 2001 – present  
**Organization:** Business School, Simon Fraser University (Vancouver, Canada)  
CIM is dedicated to helping business realize social value.  
**Web-Site:** <http://www.cim.sfu.ca>
- Position:** Associate 2002 – present  
**Organization:** Centerpoint for Leaders (Washington, DC)  
Centerpoint for Leaders focuses upon nonprofit effectiveness, offering a learning community for leaders that includes programs and services that respond to the unmet needs identified by nonprofit and community leaders.  
**Web-Site:** <http://www.centerpointforleaders.org>

- Position:** Program Founder and Adjunct Faculty Member, *Leadership for Change* and *The Center for Responsible Leadership* 1993 – present
- Organization:** School of Management – Dept. of Sociology, Boston College
- This is an executive management program that is **creative** in its:
- Content (optimizing multiple stakeholder outcomes);
  - Structure (interdisciplinary, academic-business partnership); and
  - Pedagogical method (work-based learning).
- Web-Site:** <http://www.bc.edu/schools/csom/leadership/>
- Position:** Councillor 2000 - 2002
- Organization:** Society for Organizational Learning
- SoL is a global learning community dedicated to building knowledge about fundamental institutional change. Its organizational, research and consultant members develop knowledge through action.
- Web-Site:** <http://www.solonline.org>
- Position:** Director - Intersectoral Services 1996-1999
- Organization:** Institute for Development Research, Boston, MA
- IDR identifies emerging issues, researches them, and develops new education products and consulting activities. The intersectoral program involves building relationships between the three organizational sectors of society: government, business, and voluntary organizations. As IDR's first Program Director I:
- Organized and conducted **basic and action research internationally;**
  - Developed **new education modules and materials;** and
  - Defined **new consulting product line.**
- Web-Site:** <http://www.jsi.com/idr>
- Position:** Founding Director of Communications, Research and Planning 1981 – 1991
- Organization:** Health Sciences Association, Vancouver, Canada
- As the first Director in this position for an 8,000-member labor union of health professionals I:
- Established the organization's **first communications program**
  - Established the organization's **first formal planning process**
  - Established the organization's **first formal pension strategy.**
- Position:** Director, Executive Committee member, and Chair of Planning Committee 1988 – 1991
- Organization:** British Columbia Central Credit Union
- This organization represents about 25 percent of all financial assets on deposit in the province.
- Position:** Director 1984 – 1991
- Organization:** Vancouver City Savings Credit Union
- With over \$7 billion in assets, this is the **world's largest community credit union.** I had a leadership role in organizing a reform Board that developed a **new business strategy,** which:
- **Doubled the assets** of the credit union;
  - Produced **record profits;** and
  - **Innovatively integrated "community" and "business" good.**
- Web-Site:** <http://www.vancity.com>
- Position:** Founding Trustee 1988 – 1991
- Organization:** Ethical Growth Fund
- This mutual fund has grown to be **Canada's largest** socially responsible family of funds.
- Web-Site:** <http://www.ethicalfunds.com>
- Position:** Freelance Journalist – *Various Radio and Print Media* 1977 – 1982
- Organizations:** Canada's major regional and national publications and radio, including: CBC Radio, Maclean's, Financial Post, Canadian Business, Vancouver Magazine, Radio Canada, etc.

## **Education**

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<b><u>Certificate</u></b>	<b><u>Institution</u></b>	<b><u>Date</u></b>
PhD - Sociology	Boston College, USA	1997
MBA	Boston College, USA	1996
Diploma - Mandarin	XiaDa, Xiamen, P.R. of China	1987
BA – Int’l Relations and Economics	University of British Columbia, Canada	1977
Attestation - Mandarin	Guo Yu Ribao, Taipei, R. of China	1976
Civilisation Française	Université de Genève, Switzerland	1975
Auditeur Libre - Physique-Chimie	Université de Lyon, France	1973

Academic Focal Areas: Organization change and development, leadership, social-economy, quantitative methods.

Dissertation Topic: Building social capital through bank-community partnerships.

Awards: **Outstanding Academic Achievement** - Boston College Graduate School of Management, 1995

**Outstanding Academic Achievement** - Boston College of Arts and Sciences, 1995

## **Miscellaneous**

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Languages: French (very good), Mandarin (now weak)

Nationality: Canadian.

Immigration Status: H1B

Professional Memberships and Affiliations: Society for Organizational Learning – Former Governing Council;  
International Association of Business and Society

## **International Work Experience**

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Projects have been developed in various countries. This includes conducting research, forming and leading research teams with people in: Australia, Brazil, Canada, Chile, Germany, Guinea, Hungary, India, Indonesia, Italy, Madagascar, Mexico, Philippines, South Africa, Thailand, The Netherlands, Uganda, UK, USA and Zambia.

## Grants/Consultancies

Given the action research methodology that is often employed, it is often difficult to distinguish between grants for research and consultancies for organizational/societal development outcomes. Moreover, given the nature of intersectoral collaboration work, a project usually involves interaction with numerous business, government and civil society organizations. Following are some projects where I acted as lead since 1997 ranging from \$10,000 to \$200,000; smaller consultancies and research have been provided to a large number of organizations.

<b>Funding/Client Organization</b>	<b>Project Title</b>	<b>Year Approved</b>
Metanoia Fund	Building the Global Action Network Net	2003
Metanoia Fund	Analysis of the Trade and Sustainable Development Domain (with the International Center for Trade and Sustainable Development)	2003
Metanoia Fund	Building Local GRI Networks Phase II (With the Global Reporting Initiative)	2003
Metanoia Fund	Initiating a Global Civil Society Network on the Role of Corporations (with OxfamAmerica)	2003
Spencer T & Ann W Olin Foundation	Building Local GRI Networks (With the Global Reporting Initiative)	2002
Ford Foundation - NYC	Global Public Policy Networks: Case Conference	2002
Northeast Utilities/ Sustainability Consortium	The Proteus Initiative: A conceptual foundation for large business-community collaboration to generate sustainability	2001
Spencer T & Ann W Olin Foundation	Developing Management Tools for Complex Global Networks	2001
Spencer T & Ann W Olin Foundation	Global Public Policy Networks: A new form of international governance	2000
International Youth Foundation	Strategies to Engage Business in Youth Employment	2000-01
Mvula Trust/Business Partners for Development – Water and Sanitation Cluster	Developing Intersectoral Strategies in the Provision of Water and Sanitation for the Rural Poor in South Africa	2000
VanCity Savings	Building a Financial Institution – Disabled Community – Government Collaboration	2000
Ford Foundation – Brazil	Building Business – Civil Society Collaborations	1999
United States Agency for International Development – Guinea	An Analysis of the Mission Strategy from the Perspective of Intersectoral Collaborations	1998
Ford Foundation – South Africa	Building NGO – Business Collaborations	1997
Ford Foundation – NYC	Comparisons in Intersectoral Collaboration	1997
MacArthur Foundation	Fostering Collaboration Between Business and Civil Society	1997
United States Agency for International Development - DC	Emerging Forms of Business-Government-Civil Society Partnerships in Development	1997

## **Publications, Presentations and Reports**

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Innumerable articles were published as a freelance journalist in major Canadian publications. Many presentations and workshops have been given to organizations around the world. This includes The World Bank, Harvard International Development Institute, Business For Social Responsibility, U.S. Agency for International Development, and The MacArthur Foundation.

### **Books and Chapters in Books**

- (Forthcoming) *Beyond Corporate Citizenship and Social Responsibility: Societal Learning and Change*. Greenleaf Publishing. Sheffield, UK.
- (Forthcoming) Full System Coproduction for Sustainable Development: A supply chain revolution or anecdotes? In (Ed.: Teun Wolters) *Sustainable Supply Chain Management*. Sheffield, UK: Greenleaf Publishing.
- (Forthcoming June 2004) The Global Compact as a Global Action Network: An Assessment In Malcolm McIntosh, Sandra Waddock and Georg Kell (eds.) *Learning To Talk: The Early Years of the UN Global Compact*; Greenleaf Publishing, Sheffield, UK
2003. With Janelle Plummer. Construyendo sobre los activos de socios potenciales. Partenariados en Foco: Construyendo capacidades para la gestion publico-privada. J. Plummer. Argentina, IIED - America Latina: 69-128.
2002. With Janelle Plummer. Key actors in partnerships focused on the poor. Chapter 7 in *Focusing Partnerships: A Sourcebook for Municipal Capacity-Building in Public-Private Partnerships*. London, UK: Earthscan Publications LTD. (for UNDP, DFID University of Birmingham and GHK International).
1997. Major author and researcher. *Building Bank-Community Based Organization Partnerships*. Washington, DC: The National Community Reinvestment Coalition and Department of Housing and Urban Development.

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### **Refereed Publications**

- (Revise and resubmit) Societal Learning and Change: Working on the big and complex issues and opportunities. *Journal of Corporate Citizenship*.
- (Revise and resubmit) Building a Business and Society Typology: Philanthropy, Social Responsibility, Corporate Citizenship, Mutual Gain and Societal Change. *Business and Society*.
- (Revise and resubmit) Strategies for Civilizing the Market: Four core strategies for civil society engagement with the market sector. *Nonprofit Management & Leadership*.
2003. Global Action Networks: A Global Invention Helping Business Make Globalisation Work for All. *Journal of Corporate Citizenship* 12: 27-42.
2003. Global Action Networks: Building global public policy systems of accountability. *AccountAbility Quarterly*. Vol. 20.
2002. Core Competencies: A Key Force in Business-Government-Civil Society Collaborations. *Journal for Corporate Citizenship*. Vol. 7: 43-56.
2002. New Era Societal Learning Leadership: Six core concepts to cross the development divides. *Reflections: Journal of the Society for Organizational Learning*. Vol. 3 (4): 19-27. Summer.
2001. Engaging Business in Youth Employment and Livelihood: Strategies and Practical Steps. *What Works Series*. Baltimore, MD: International Youth Foundation, Volume 4.
2001. Cisco Systems Vision Yields Social Capital and Meaning. *Reflections: The SoL Journal*. Vol. 3 (1): 20-21.
2000. Emerging Models for Developing Water Systems for the Rural Poor: From Contracts to Co-Production. *Research and Survey Series*. London, UK: Business Partners for Development.
2000. A "Win-Win" Role for Civil Society in Business Strategy. *Journal for Nonprofit Management*. Vol. 4 (1): 24-43. Summer.
2000. The Role of Nonprofits in Business Strategy. Chapter 14 in Blendell, Jem (ed.) *Terms for Endearment: Business, NGOs and Sustainable Development*. Sheffield, UK: Greenleaf Publications.

2000. New Institutions for the Practice of Corporate Citizenship: An Intersectoral, Developmental and Historical Perspective. *Business & Society Review*. Spring.
1997. With Brown, L.D. Five Steps in Building Intersectoral Relationships. In *NPI Partnership Guide*. Washington, D.C.: USAID. Chapter 5.
1997. A Survey of Civil Society-Business Relationships. *IDR Report*. Vol. 12(2)
1997. The Four Pros of Bank-Community Relationships: profits, property, process and products. *IDR Report*. Vol. 12 (1).
1995. Emerging Social-Economic Institutions in the Venture Capital Industry: An Appraisal, *American Journal of Economics and Sociology*. Vol. 54 (3) July.
1995. Lessons from the Healthy Cities Movement for Social Indicator Development. *Social Indicators Research* Vol. 34: 213-235. January.
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## Refereed Presentations

2003. NGO Strategies to engage business: A status discussion paper on trends and critical issues. Boston, MA, Global Action Networks Net. Prepared in collaboration with Civicus and Oxfam America.
2003. Global Public Policy Development and Multi-Stakeholder Processes: The Global Reporting Initiative Experience. *The Annual Meeting of the International Association of Business and Society*. Rotterdam, The Netherlands. June 26-30
2003. Connecting the Global and Local: A Strategy for the Global Reporting Initiative. *The Annual Meeting of the International Association of Business and Society*. Rotterdam, The Netherlands. June 26-30
2002. Global Public Policy Networks: Contested spaces where the human spirit can triumph. *International Association of Business and Society Annual Meeting*. Victoria, BC, Canada. June 29.
2001. Business-Government-Civil Society Collaborations: A brief review of key conceptual foundations. *International Association of Business and Society Annual Meeting*. Sedona, NM. March 15-18.
2000. Generating New Core Competencies for Systems Change through Business-Civil Society Collaboration: The emerging mutual gain perspective. Presentation for the Discovering Connections Conference. Detroit: University of Michigan and Visteon. Sept. 25-27.
1999. Government-Business-Civil Society Collaborations as Agents for Social Learning and Innovation. *Academy of Management*. Presentation to the annual meeting in Cincinnati, OH. August.
1999. An Introduction to Trisectoral Strategies. Harvard International Development Institute. Feb.
1998. Synergistic Bridging Organizations: A new type of development organization. *Association for Research on Nonprofit Organizations and Voluntary Associations*. Presentation to the annual meeting in Seattle, WA.
1996. Emerging Higher Level Systems for Change: Learnings from Action Research Beyond the Organization Level. *Academy of Management*. Presentation to the annual meeting in Washington, DC. August.
1996. New Strategies for the Finance Industry: Building Business by Building Social Capital. *The World Business Forum*. Presentation to its meeting in Istanbul, Turkey. June.
1996. A New Approach to Business-Academic Education Partnerships. *The World Business Forum*. Presentation to its meeting in Istanbul, Turkey. June.
1995. Bank Strategy as Social Capital Development. *The American Sociological Association*. Presentation to the annual meeting in Washington, DC. August.
1994. Socially Guided Venture Capital Development. *The Society for the Advancement of Socio-Economics*. Presentation to the annual meeting in Paris, France. August.
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## Non-Refereed Articles, Presentations and Reports

2003. Corporate Motivation to Respond to Sustainable Development: A Comprehensive Approach. *Harvard International Development Conference*. Harvard University, Cambridge, MA, USA. Apr. 4-5.

2003. Societal Learning and Change: Building Upon Organizational Learning for an Increasingly Complex World. *Conflict Management Group*. Cambridge, MA, USA. Apr. 3.
2003. Creating Development Opportunities in a Changing World. *Bridge-Builder Conference*. Harvard University, Cambridge, MA, USA. Feb. 9-14.
2003. The Access Initiative January 2003: A Report on Development Issues at Two Years of Age. *A Report for The Access Initiative*. January.
2002. The Role of Business in Global Public Policy Networks. *Global Governance 2002 Conference*. Forum International de Montreal. Oct. 15.
2002. Building Your YES Network: Core Concepts and Steps. *Youth Employment Summit*. Alexandria, Egypt. Sept. 10.
2002. Strategies to Engage Business in Youth Employment. *Youth Employment Summit*. Alexandria, Egypt. Sept. 10.
2002. When Both Business and Society Benefit: Synergistic Change through Societal Learning and Change. *Systems Thinking in Action Conference*. Pegasus Communications. San Diego, CA. Sept. 30.
2002. Bringing Ethics, Effectiveness, Communications and Participation into Global Decision-Making. *Corporate Ethics Monitor*. Vol. 14 (1) January-February. Toronto, Canada: Clarkson Centre for Business Ethics, University of Toronto
2001. Societal Learning: Creating change strategies for large systems change. *Systems Thinker*. Waltham, MA: Pegasus Communications. Vol. 12 (10): 1-5.
2001. NGO's Role in Business Strategies. *Corporate Ethics Monitor*. Toronto, Canada: Clarkson Centre for Business Ethics, University of Toronto. Vol 13 (3)
2001. Building Management Tools for Building Complex Global Networks: a preliminary report for The Access Initiative. World Resources Institute et al. August.
2001. Building a Global Sustainable Development Consortium. A report for the Proteus Initiative. *Society for Organizational Learning – Sustainability Consortium*.
2001. The YES Global Alliance for Youth Employment: Strategies for development. A report to the Youth Employment Summit: Newton, MA, USA.
2001. Engaging Business in Youth Employment and Livelihood: Bridging Divides. An analysis of eight case studies. The International Youth Foundation (Baltimore, MD, USA) and the Youth Employment Summit (Newton, MA, USA)
2001. The Youth Employment Summit 2002 Campaign: Key concepts for consideration. A report to the Youth Employment Summit. Newton, MA, USA.
2000. With Aarthi, RN. The road ahead. *Down to Earth Magazine*. New Delhi: Centre for Science and the Environment. Vol. 9 (12). Nov. 15: 24-27.
2000. Business-Civil Society-Government Collaboration: A brief review of key concepts. Cambridge, MA: Interaction Institute for Social Change. September.
2000. From Contracts to Co-Production: Emerging Models for Developing Water and Sanitation Systems for the Rural Poor. A report for Mvula Trust: Johannesburg. July.
2000. A Case Study of Build Operate Train Transfer (BoTT) approaches with government, business and civil society in the water and sanitation: Amanz'abantu. Johannesburg, South Africa: Mvula Trust. July.
2000. Inter-Sectoral Collaboration Development: An analysis of opportunities for the Interaction Institute for Social Change. Interaction Institute for Social Change: Cambridge, MA. June.
2000. A Preliminary Look at Youth Employment: The Role of the Private Sector. Baltimore, MD: International Youth Foundation; Newton, MA: Youth Employment Summit. June.
2000. With Cross, Piers. Trends Amongst NGOs in the Water and Sanitation Sector: A competencies-driven international and intersectoral analysis. Presentation to the Second World Water Forum and Ministerial Conference. The Hague, The Netherlands: March 17.
2000. Engaging Civil Society Globally in the Global Reporting Initiative: A strategy discussion paper. Boston, MA: CERES/GRI. Feb. 7.

- 1999. The Role of Sectoral Actors in Development: A Strategic Mutual Gain Perspective of Business-Civil Society-Government Collaboration Applied to Mvula Trust. Presentation to the Pan-African Conference on Financing Community Water Supply and Sanitation. Mpumalanga, South Africa. Nov. 26.
- 1999. The Evolving Strategic Benefits for Business from Nonprofit Collaboration: A resources, competencies and capabilities perspective. Presentation to the World Bank's Global Public Policy Network. Nov. 8.
- 1999. Agents in the development and financing of small enterprises: government-business-civil society collaborations. Presentation to the InterAmerican Development Bank. Oct.
- 1999. Wealth Creation and Management Through a Collaboration Between Government, the Disabled Community and VanCity (financial institution): Developing a strategic approach. A report to the Board. Oct.
- 1999. Partnering to Improve Development Impact: A report to USAID/Guinea on its partnership innovations.
- 1999. Trisectoral Coproducers: A new type of development organization. World Bank presentation.
- 1999. Intersectoral Reference Book for USAID Missions.
- 1998. Mvula Trust: Building the Mission with a Pty (forprofit affiliate): A report on issues and strategies to develop a Pty-affiliate of the Trust.
- 1996. A New Form of Enterprise. *Report to the Bankers Council of the National Community Reinvestment Coalition*. March.
- 1996. Strategies for Change: More Banks Discover the Benefits of Social-Financial Management. *Executive Citizen*. Vol. 5 (2) March/April
- 1995. Banking Mergers: 'Social Financial' Management. *The Boston Globe*. Nov. 21. Business Section, p. 38.
- 1994. Lessons from American Community Economic Development for VanCity Savings Credit Union. *Report to the Board of Directors*. April.