

# Steven F. Freeman

Telephone: (215) 898 6967  
Fax: 215-898-8934

Center for Organizational Dynamics  
**Suite 328A, 3401 Walnut Street**  
Philadelphia, PA 19104-6286

[sff@sas.upenn.edu](mailto:sff@sas.upenn.edu)  
[sf@alum.mit.edu](mailto:sf@alum.mit.edu)

## CURRICULUM VITAE

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### **Academics: Professor of Innovation, Organization, Entrepreneurship and Research Methods**

- Teaching: Ten years experience educating undergraduates, MBAs and executives at elite US & Latin American institutions; author of awarding-winning teaching cases and teaching notes
- Research: Published in a broad range of fields and forums, academic and popular; recipient of five national research awards and many prestigious grants.
- Outreach: Research articles, cases, course notes, and essays for general audiences; research applications through consulting, presentations and workshops. Extensive public speaking appearances for a wide variety of groups. Expert testimony before state and national committees, and the US Congress. Hundreds of radio and TV interviews. Extensively cited in many newspapers and national publications.

### **Business: Experience in New Ventures, Corporate Management and Knowledge Applications**

- Entrepreneurship: Initiated four new business ventures
- Corporate Management: Helped build an international contract research firm comprising 500 professionals
- Knowledge Applications: Independent consulting practice applies systemic approaches to developing organizational resilience, adaptation and innovation.

### **Public Service**

- Founder of two Public Service organizations: **Election Integrity** (director from 2004 - present) and **Verlos** (director from 2001-2002)

## ACADEMIC AFFILIATIONS

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### Academic Positions

**University of Pennsylvania, School of Arts & Sciences** **2003-present**  
Center for Organizational Dynamics Philadelphia, Pennsylvania

Research, teaching and development for innovative center dedicated to a broad understanding of organizational processes for a broad range of managers and leaders.

**Universidad de San Andrés** **2002**  
Karel Steuer Chaired Professor (Visiting) in Entrepreneurship Buenos Aires, Argentina

The Universidad de San Andreas is an innovative, enterprising, private college on the outskirts of Buenos Aires. The Karel Steuer chair is the only chaired professorship of entrepreneurship in Latin America.

**University of Pennsylvania, Wharton School** **2000-2001**  
Visiting Assistant Professor of Management Philadelphia, Pennsylvania

Taught and conducted research in Entrepreneurship.

**INCAE (Central American Institute of Business Administration)** **1998-2003**  
Professor of Management Alajuela, Costa Rica & Managua, Nicaragua

INCAE was founded by Harvard Business School and the Organization of American States to serve as a Spanish language version of the HBS program. It is Latin America's only international business school, attracting top students from throughout the region and interchange students from around the world. The executive education program is among the world's largest, training regional leaders from all professions.

**Education****Massachusetts Institute of Technology, Sloan School of Management**

Ph.D. in Organization Studies, June 1998

American Association of Collegiate Schools of Business Scholarship Award Winner (1994-98)

Research Assistantships in the *MIT Center for Coordination Science* and the *MIT Organizational Learning Center*

**University of Pennsylvania, Wharton School**

M.S. Social Systems Sciences, June 1987

Anheuser Busch Fellowship, Research Assistantship in the Wharton Entrepreneurial Center

**University of Pennsylvania, Arts & Sciences**

B.A. Political Philosophy, June 1985 (University and Departmental Honors)

**Professional Affiliation**

Academy of Management: Organizational Development & Change, Managerial Cognition, Organization Management Theory, and Entrepreneurship divisions

American Association for the Advancement of Science, American Association for Public Opinion Research, American Sociological Association (past)

Helped organize the Third International Conference on Systems Thinking in Management: "Transforming Organizations to Achieve Sustainable Success" (Philadelphia, May 2004)

**ACADEMIC AWARDS****Research Awards**

- 2006 Sonoma State University's Project Censored. Award for the #3 most important 2005 story not reported in the US mainstream media.
- 2004 CASE Association Fellow's Award for Outstanding Field Based Case Research: *Vegetales Cortados*, *SA Start-up Strategy* selected as the 2004 Best Business Teaching case; *Mastitis at Lácteos Pacíficos* was also selected as one of five finalists for the 2004 Best Business Teaching case
- Winner of Best Practice Paper, Academy of Management 2003, Organizational Development & Change
- Organized panel selected as Showcase Symposium, Academy of Mgmt 2000 annual meeting.
- Winner of Best Student Paper, Academy of Mgmt 1998, Managerial & Organizational Cognition
- Winner of Best Overall Research Paper, Academy of Management 1997 annual meeting, Organization Development & Change division

**Scholarships and Grants**

**Alliance Holdings** (2006-present) Grants to conduct research on employee ownership and Employee Stock Ownership Plans (ESOPs).

**Vital Sparks Foundation** (2006-present). Grants to conduct election verification exit polls

**Velvet Revolution** (2006). Grants to conduct election verification exit polls

**Center for Organizational Dynamics** (2003-present) University of Pennsylvania, School of Arts & Sciences (Graduate Division) Center Scholar

**Rochester Printing Industry Project** (2003- 2006): Grant to study printing industry responses to adverse economic and technological conditions

**High Performance Systems, Inc.** (2003) Grant for work to develop quantitative models of organizational resilience using HPS iThink/STELLA systems dynamics software

**TRIAD** (2001-02): Grant to study the organizational consequences of the September 11<sup>th</sup> attacks; extended to conduct a case study explaining the astounding recovery of one hard-hit firm

**Centro Latinoamérica para la Competitividad y el Desarrollo Sostenible** (an international research project sponsored by the Harvard Institute for International Development and the AVINA foundation): Grant awarded 1998-99 for the cross-cultural studies of factors affecting values and attitudes; extended 1999-2000 for the study of cooperation

**International Motor Vehicle Project** (an industry consortium managed at MIT Sloan), Principal investigator managing projects on organizational effects of adversity: Grant awarded 1996-97 to study organizational change in the US auto industry; extended 1997-99

**American Association of Collegiate Schools of Business Award:** Ph.D. scholarship providing tuition and stipend for doctoral study at institution of student's choice (1994)

## COURSES TAUGHT

### **Organization and Strategy**

- *Creativity and Innovation in Work and Organizations*
- *Organizational Resilience and Crisis Management*
- *Planning and Managing Organizational Change*
- *Organization Theory & Behavior* (MBA core course using three perspectives – strategic design, politics, and culture – to understand organizations)
- *MBA Consulting Project* (MBA capstone course: a consulting project involving field research)

### **Entrepreneurship**

- *New Venture Initiation* (MBA course on Entrepreneurship)
- *Entrepreneurial Decision Making* (Undergraduate course on Entrepreneurship)

### **Workshops**

- *Systems Thinking for Entrepreneurship:*
- *Improvisational Leading, Following, and Management*
- *Developing a Strategic Plan*
- *Introduction to Entrepreneurship*
- *Employee Motivation*
- *Basic Tools of Resilience*
- *Research Methods and Survey Design*
- *Writing a Research Paper*
- *Choosing a Topic for your Research*
- *Conducting a Research Literature Review*
- *Incorporating Measures into Qualitative Research*
- *Avoiding Bias in Qualitative Research*
- *Case Writing and Case Study Research*

## PUBLICATIONS

### Books

- Freeman, Steven F. and Joel Bleifuss (Foreword by U.S. Representative John Conyers, Jr.) 2006. *Was the 2004 Presidential Election Stolen? Exit Polls, Election Fraud, and the Official Count* (New York: Seven Stories Press)
- Reynolds, Paul D. & Steven F. Freeman. 1987. *The 1986 Pennsylvania New Firms Study* (Washington, DC: Appalachian Regional Commission)

### Refereed Academic articles

- Freeman, Steven F., Marc Maltz and Larry Hirschhorn. 2004. "The Power of Moral Purpose: Sandler O'Neill & Partners in the Aftermath of September 11, 2001" *Organizational Development Journal* (December 2004)
- 2003. "Moral purpose and organizational resilience: Sandler O'Neill & Partners in the aftermath of September 11, 2001." In D. Nagao (Ed.) *Academy of Management BEST PAPERS 2003*
- Freeman, Steven F. (2001) "Cómo manejar la pérdida y el cambio" (How to manage loss and change). *Revista INCAE*
- 2000. "Tres perspectivas para entender las organizaciones" (Three perspectives to understand organizations). *Percepción Gerencial* 3(2) reprinted in Kettlehorn, (ed.) *Forjando el Futuro* (Forging the future) p. 159-176. Alajuela, Costa Rica: INCAE Press
- 1999. "Identity maintenance and adaptation: a multilevel analysis of response to loss." In B.M. Staw and R.M. Sutton (Eds.) *Research in Organizational Behavior* Vol. 21:247-294 Greenwich, CT: JAI Press
- 1998. "Good decisions: reconciling human rationality, evolution, and ethics." In B. Keys and L.N. Dosier (Eds.) *Academy of Management BEST PAPERS 1998* (Madison, WI: Omnipress)
- 1997. "Organizational loss." In B. Keys and L.N. Dosier (Eds.) *Academy of Management BEST PAPERS 1997*, pp. 264-68 (Madison, WI: Omnipress)
- 1988. *Notes to a friend who is planning to start a business* (Philadelphia, PA: Wharton Press): Problems of marketing, financing and managing a start-up firm

### Other Publications

- Freeman, Steven F. and Josh Mitteldorf. 2005. Exit Poll Report Suggests a Corrupted Election (despite what you may have heard). *In These Times* (February 16, 2005)
- Freeman, Steven F. (2002) "Empresarialismo y Resiliencia" (Entrepreneurship and Resilience). *Gestion* (Buenos Aires, Argentina)
- Freeman, Steven F. 2000. *Entendiendo Organizaciones*. Chapter 10 in Kettlehorn, (ed.) *Forjando el Futuro* (Forging the Future) p. 159-176. Alajuela, Costa Rica: Prensa INCAE

### Dissertation (1998)

*Title:* The problem of identity in organizational behavior and human decision processes.

*Committee Members:* John Carroll (chair), Lotte Bailyn, Maureen Scully, and John Van Maanen

Why did it take the American auto industry so long to respond to Japanese advances in design and production? I studied what Chrysler and GM paid attention for a 25-year period, concluding that they attended primarily to threats made widely public on mass media, while ignoring those that had been quietly transforming their industry. Once the threat was acknowledged, several other impediments to change ensued. I document similarities between individual and organizational resistance to change.

To explain both attention patterns and resistance to change, I utilize theories of identity and structural niches. I explore different understandings of how identities and group identifications emerge and how they affect decision-making, attention, and change. The "problem of identity" is that identity under stress is often little more than a loosely coupled collection of conflicting impulses.

## Research Reports

*Analysis of the 2004 Presidential Election Exit Poll Discrepancies* (March 31, 2005) Salt Lake City, UT: US Count Votes, with 10 other co-authors, mostly statisticians

*Response to Mitofsky-Edison Report* (explaining the discrepancy between exit poll survey results and the official count in the 2004 Presidential Election) January 28, 2005 (Salt Lake City, UT: US Count Votes) with 10 other co-authors, mostly statisticians

*The Unexplained Exit Poll Discrepancy* (December 29, 2004): Observes a large, unexplained discrepancy between exit poll survey results and the official count in the 2004 Presidential Election. Widely read around the world. Generated so much traffic that it brought down U. Penn and Applied Research servers in November 2004.

*Success under Adversity: Differentiating Leaders from Laggards during Hard Times in the Printing Industry* (October 2004: Rochester Institute of Technology Printing Industry Center) with Sandy Rothenberg

*Reconciliando Cultura y Metas en la Superintendencia de Bancos, Bolivia* (July 2002, Superintendencia de Bancos, federal government of Bolivia) with Javier Diez de Medina and Luis Fernando Avila: An attempt to reconcile organizational ends with organizational culture

*Diagnostica de Cultura Organizacional, Superintendencia de Bancos, Bolivia* (January 2002, Superintendencia de Bancos, federal government of Bolivia) with Javier Diez de Medina and Luis Fernando Avila. An analysis of the organization culture with emphasis on explaining aspects of behavior that management believes to be maladaptive.

*Comparing Out-Group Cooperation in Latin America with Out-Group Cooperation in the US* (January 2000, AVINA Foundation): In contrast to received theory (Hofstede), evidence suggests that Latin Americans are fundamentally *less* cooperative than North Americans and that this underlies many problems of Latin America.

*Estrategia y el Web: oportunidades en Latinoamérica* with C. Cortéz (November 1999, AVINA Foundation): Opportunities for web-based business development in Latin America

*A Program for Research on Work and Community* (February 1999, AVINA Foundation)

*Emerging Visions in Organization Studies: An Introduction for Colleagues and Collaborators* (October 1998, AVINA Foundation)

*Quantifying Qualitative Data: Coding Techniques and Software to Measure Organizational Attention* (November 1997, MIT Organization Studies Group)

*Reasoning Used in Important Life Decisions* (March 1997, MIT Organization Studies Group): Results of interviews designed to elicit the use of utilitarian and deontological reasoning processes in important individual decisions.

*Toward A Handbook for Organizational Decision-Making* (June 1996, MIT Center for Coordination Science): Alternatives for representing decision-making processes, explores the gulf between

prescriptive and descriptive decision making literatures

*Why Do They Call Them Salespeople Anyway?* (January 1995, MIT Organizational Learning Center): Report using ethnographic methods on the work of FedEx salespeople

Reynolds, Paul D. & Steven F. Freeman. 1987. *The 1986 Pennsylvania new firms study: four volumes and an executive summary*. Washington, DC: Appalachian Regional Commission

### Cases

*Vegetales Cortados, SA Startup Strategy* (2004): (A) Differences in marketing and development strategy between a new enterprise and an established firm, and (B) The small firm as counter-puncher: What to do when a powerful new competitor enters your market niche (Selected as the Best Business Teaching Case for 2004, by The CASE Association)

*Mastitis at Lácteos Pacíficos* (2003): A batch of soured product is delivered. (1) What to do in a crisis, and (2) How to avoid crisis (Selected as a finalist, CASE Association Best Business Teaching Case)

*Jugos Tropicales* (2002): The importance of market segmentation and focusing on *under-served* markets

*Datatex* (2001) with L.M. Garcia: Compares startup experiences in the US and Nicaragua

*Comercializadora de Madera Costarricense* (2000) with C. Cortéz: Making a sustainable development business vision in the tropics a reality

*Clean Pets* (2000) with A. Bailey: Things go awry when the founders are not there. Leads to discussion of how to systemize and operationalize tacit founder knowledge and practice

### Teaching Notes

*Guide to Developing and Writing a Research Paper* (2004)

*How to Come up with Good Business Ideas: Ideas and the New Venture* (2004): How to generate, select, and develop new business ideas

*How to Research a New Venture Opportunity* (2001)

*Entrepreneurship and Venture Initiation* (2001): Introductory material outlining the steps in developing a business plan: (1) identify an opportunity, (2) develop the concept, (3) determine the resources required, (4) determine how to acquire required resources, and (5) evaluate risks and planning for contingencies

*The 80-20 Rule of Entrepreneurship* (2001): Large, established firms go after the mass markets; an entrepreneur must look for an underserved niche. For use with *Jugos Tropicales*

*The Variety of New Ventures* (2000): For use with *Vegetales Cortados*

*Numerical Presentation in a Business Plan* (2000): Basics of numeracy, accounting, and presentation; how to prioritize; and how to clarify and improve estimates

### Management Education Notes

A Rubric for Evaluating Research Papers (2004)

A Guide to Evaluating Class Discussion (2004)

A Proposal for Establishing an Entrepreneurship Curriculum in Small Business Schools (2002)

The Opportunity for Experimental Social Science Research in Latin America (2001)

### Popular Press

Op-Eds published on a variety of subjects in the *Boston Globe*, the *Philadelphia Inquirer*, the *Philadelphia Daily News*, the *San Francisco Chronicle*, *In These Times*, *Newsday*, the *South Florida Sun-Sentinel*, *Salon*, *TomPaine.com* and *AlterNet*.

Work has also been featured prominently in *Rolling Stone*, the *Washington Post*, *BusinessWeek*, the *Chicago Tribune*, the *New Yorker*, the *New York Times*, *Le Monde*, *Der Spiegel*, the *BBC*, *PBS*, *MSNBC*, *CNN Español* and hundreds of other publications, radio and TV stations around the world.

Author of the syndicated column, “*The World as it Should Be*” (1987-1988)

## **WORKING PAPERS AND PRESENTATIONS**

### **U. Penn Graduate Division, School of Arts & Sciences, Center for Organizational Dynamics**

Working Paper #07-01: Effects of ESOP Adoption and Employee Ownership: Thirty Years of Research and Experience (January 14, 2007). (*Most downloaded paper in the history of the PennCommons*)

WP#05-05: Polling for Errors? Do Pre-Election Telephone Polls Track –and Legitimize– Corrupted Election Tallies through Flawed Methodologies? An Analysis of the 2004 US Presidential Election and the Pre-Election Polls (July 11, 2005)

WP#05-04: An Examination of Exit Poll Accuracy and Discrepancies with Official Counts in U.S. Elections (June 20, 2005) Historical accuracy of exit poll survey results and explanations for discrepancies.

WP#05-01: Hypotheses for Explaining the Exit Poll-Official Count Discrepancy in the 2004 US Presidential Election (January 5, 2005 – summarized in US Congressional Report, “What Happened in Ohio.”)

WP#04-05: September 7, 2004: *Finding Connectedness in Buenos Aires: Argentine Tango as Antidote to the Human Condition*

WP#04-04: August 27, 2004: *The Role of Moral Purpose in Sandler O’Neil’s Post-9/11 recovery* with L. Hirschhorn & M. Maltz August 10, 2004 presentation at the Academy of Management national meeting (Manuscript in preparation for submission to *Administrative Science Quarterly*)

WP #04-03, June 18, 2004: *Developing Capabilities of Resilience to Enhance Safety on NASA Space Programs* (Manuscript in preparation for submission to *Research Policy*)

WP#04-02, June 11, 2004: *Beyond Traditional Systems Thought: Resilience as a Strategy for Security and Sustainability* (Manuscript in preparation for submission to *Systems Research and Behavioral Science*)

### **INCAE Working Papers**

June 2000. The Effects of Situational Cues on Values (AVINA Foundation, 2001) Experimental manipulation of values through minimal situational cues; illustrates the fundamental malleability of values that economic modelers often take to be fixed goals guiding behavior

February 2000. *The Coordination Game*. A game designed to test abilities necessary for cooperation. My aim was to try to explain in part a lack of cooperation among Central Americans.

### **Massachusetts Institute of Technology, Sloan School Working Papers**

July 2000. *Patterns of executive attention in us auto industry letters to shareholders 1963-1987*. No. American automaker (lack of) response to Japanese advances in design and manufacturing.

June 1998. *The problem of ‘identity’: a review and typology of perspectives on identity*

June 1998. *Good decisions: reconciling human rationality, evolution, and ethics*. Why findings from behavioral decision research diverge from decision analysis prescriptions

**Research Presentations** (in most case, with papers and/or videos published in conference proceedings)

- National Latino Congreso (Los Angeles, California; October 5, 2007) Losing the Right to Vote (and all our other rights too)
- Tour of Five Universities in Ontario, Canada (September 2007) Election Fraud in the US and international disenfranchisement through election privatization.
- Academy of Management annual meeting (Philadelphia, August 2007) *Effects of ESOP Adoption and Employee Ownership: Thirty Years of Research and Experience*
- American Association for the Advancement of Science (AAAS) Annual Meeting (San Francisco, CA; February 16, 2007) *Are We a Democracy? Vote Counting in the United States*. Talk also presented for various groups in eight other western cities.
- Free Press National Media Reform Conference. (Memphis, TN; January 16, 2007) *The Failure to Report Evidence of Corrupted Vote Counts in US Elections: Why the Failure and What Can be Done about it*
- Congressional Black Caucus Annual Legislative Conference (Washington, DC; September 8, 2006) *Black Disenfranchisement in Contemporary US Elections*
- American Association of Public Opinion Research Annual Conference (Montreal, Canada; May 19, 2006) *Who Really Won -- and Lost the 2004 US Presidential Election?*
- Lehigh University panel on Electronic Voting (Bethlehem, PA; March 8, 2006) *Electronic Voting – Not Just a Hypothetical Problem*
- Center for Organizational Dynamics alumni association (Philadelphia; November 3, 2005) *Effects of ESOP Adoption and Employee Ownership: Thirty Years of Research and Experience*
- American Statistical Association, Philadelphia (October 14, 2005) *Polling Bias or Corrupted Count? Accepted Improbabilities and Neglected Correlations in 2004 US Presidential Exit Poll Data*. Joint presentation with Warren Mitofsky, director of the National Election Pool, and “father of the exit poll.”
- Testimony at the U.S. House of Representatives Judiciary Committee Forum on Election Integrity (Conyers’ hearing); *The Unexplained Exit Poll Discrepancy in the 2004 US Presidential Election*. Focus especially the results in Ohio (Washington, DC: Wednesday, Dec 08, 2004)
- Academy of Management annual meeting (New Orleans; August 8, 2004) *The Role of Moral Purpose in Sandler O’Neil’s Post-9/11 recovery*
- Improvisation in Management, 2<sup>nd</sup> Conference, INSEAD School of Business, (Fontainebleau, France; July 8, 2004) *Organizational Leadership Lessons from the Improvisational Arts* with P.L. McLeod
- National Science Foundation Conference on Organization Design (New York University, June 5, 2004) *Resilience as a Strategy to Secure Safety for NASA’s Next Generation Launch Technology (NGLT) Program*. sponsored by the NSF’s Innovation and Organization Change Program
- Systems Thinking in Management 3rd International Conference Session on Sustainability (Philadelphia; May 20, 2004) *Beyond Traditional Systems Thinking: Resilience as a Strategy for Security and Sustainability*.
- The CASE Association (Providence, RI, May 12, 2004) Cases -- *Startup Marketing Strategy for Vegetales Cortados and Mastitis at Lácteos Pacíficos* Best Business Teaching Cases 2004.
- Rochester Institute of Technology Printing Industry Center (Rochester; November 5, 2003) *Resilience in the Printing Industry*.
- Center for Organizational Dynamics Keynote speech for the New Students Orientation: (Philadelphia, September 13, 2003) *The Art and Science of Organization: Resilience and Moral Purpose*.
- Academy of Management annual meeting. Best Paper Award, Organizational Development and Change (Seattle, August 2003). *Organizational Resilience and Moral Purpose: Sandler O’Neill* Also presented at Case Western Institute Organizational Behavior Department (Cleveland, November 6, 2003)
- Keynote speech for Universidad de San Andrés conference: "Oportunidades en la crisis" (Buenos Aires,

- Argentina, April 11, 2002) *Entrepreneurship, Crisis, and Resilience*.
- University of Virginia (Charlottesville, VA February 18, 2002) *Individual and Organizational Resilience*.
- Academy of Management annual meeting (Washington DC, August 9, 2001). *Patterns of Executive Attention in US Auto Industry Letters to Shareholders 1963-1987*. Also presented at
- Academy of Management annual meeting Showcase Symposium (Toronto, August 9, 2000) *Evolutionary theory and organization theory: parallels and cross-field contributions*.
- Academy of Management annual meeting (Toronto, August 9, 2000) *Biological bases for behavior in organizations: Human evolution and its implications for organization theory and management practice*.
- INCAE Research Colloquium (Costa Rica, Oct 17, 1999) *Experiments in culture and behavior*. Cross-cultural factors affecting cooperation & conflict, goals & values, and attitudes toward innovation.
- Conference on Corporate Reputation, Identity, and Image (San Juan, Puerto Rico; January 5, 1999) *Organizational identity and change*.
- INFORMS International Conference (Tel Aviv, Israel; June 28, 1998) *Organizational Attention in US Auto Industry: How and why the US auto industry failed to address Japanese advances in production and design*.
- Academy of Management annual meeting (Boston 1998) *Best Papers*, Managerial and Organizational Cognition division (award for best student paper) *Good decisions: integrating behavioral decision research, evolutionary psychology, and ethics*. Also presented to the Society for Business Ethics.
- Academy of Management annual meeting. Best Paper Award, Organizational Development and Change (Cincinnati, Ohio; August 1997). *Identity maintenance and adaptation: a multilevel analysis of response to loss*. (Practitioner version presented at the International Motor Vehicle Project Research Conference, Boston June 1997)
- MIT Organization Studies Group Colloquium (Cambridge, MA; April 1997) *Decision processes: exploratory research on reasoning used in important life decisions*. Results of interviews designed to elicit the use of utilitarian and deontological reasoning processes in important individual decisions.

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## **BUSINESS EXPERIENCE**

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### **COMMERCIAL NEW VENTURES**

- Applied Research – US** (2001-present) Applied Research focuses the world's knowledge on solutions to client problems. We systematically apply existing knowledge relevant to client needs. When fresh solutions are needed, we apply the tools of knowledge acquisition to learn how to do best what you want to accomplish. Intelligent leaders use Applied Research to develop their own capabilities experience and analytical ability, rather than paying consulting firms to develop theirs.
- Compass Management Consultants**, Albuquerque, NM (1991-94). Installed and developed accounting and management information systems for government contractors, and advised on general management issues. Clients included contract research firms, the U.S. Bureau of Indian Affairs, United Way Agencies, and contractors providing support for Sandia National Research Laboratory and Kirtland Airforce Base.
- Aurora Acres Bed & Breakfast** (1990-93). Established, operated and sold B&B.
- Co-op & Condo Connection** (1986-87). Real estate information firm, using new database technology to try to reduce real estate transaction costs.
- Housing Development** (1982-86). Bought and refurbished old houses for rental and resale

## CORPORATE MANAGEMENT

**Applied Research Associates**, Albuquerque, NM (1988-90) Managed corporate office for contract research firm. Direct responsibilities included financial management, MIS, budgeting, policy development, and marketing support. Oversaw accounting, contract administration, and personnel functions. Helped put systems in place that enabled growth from 50 to 500 professionals and from 6 to 30 locations.

## CONSULTING AND CONTRACT RESEARCH

**Bolivian Controlaría** (national audit agency): Conducted training seminar on understanding organizations and organizational change; developed organizational mechanisms to promote integrity, transparency, and incorruptibility focusing on aspects of organizational culture.

**Bolivian Superintendencia de Bancos** (national banking regulatory agency): Analyzed the organization's culture to explain aspects of behavior management believed to be maladaptive. Helped elaborate the agency's primary responsibilities and develop methods to best fulfill them.

**TRIAD Organizational Research**: Research on the organizational consequences of the September 11<sup>th</sup> (2001) attacks; extended to conduct a case study explaining the extraordinary resilience of one hard-hit firm, Sandler O'Neill and Partners

## Other Past Consulting Positions

**MIT Organizational Learning Center**, Cambridge, Massachusetts (1993-96). Worked under Peter Senge (author of *The Fifth Discipline*) to apply principles of Organizational Learning and System Dynamics to improve corporate performance.

**Institute for Interactive Management**, Philadelphia, PA (1987-88). Worked with three Wharton faculty founders including Russell L. Ackoff (author of *Creating the Corporate Future* and 18 other books) to facilitate major organizational redesign projects at Eastman Kodak, Metropolitan Life, Anheuser Busch, and the University of Pennsylvania.

## PUBLIC SERVICE

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**Election Integrity** (Director, 2004 - present). Founded to help protect the integrity of vote counts through techniques of verification and analysis –exit polling, election data forensics, strategic litigation and education. Published many op-eds, articles, and a book on threats to election integrity. Testified before many national and state groups and the US Congress.

**Puente** (Director, 2000-02) Developed business plans providing modern communications and financial management options to Hispanic foreign nationals in the US: *VerLos*, Internet-based videoconferencing for Latin American workers in the US and their families in Latin America, and *VerDar*, remittance and credit options for Latin American workers in the US. Worked with Hispanic community groups obtain grants to provide computer training and Internet access.