



GO Global Organization  
Design Society



Readings in Global Organization Design  
2005 Conference Materials

[Presenter profiles](#)

## Presenter profiles

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### Jack Brady by video

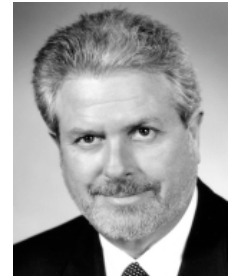
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### Dr. John Bryan

#### BWB Consultants Ltd. and COREinternational inc.

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John C. Bryan, Executive Advisor, is a senior organisation design and development consultant with COREinternational inc. and President of BWB Consultants Ltd.

Trusted Leadership, Requisite Organisation and Life Integration are the core and aim of his practice.

John has been an executive and treasurer, a director of leadership development and a director of organization development for The United Presbyterian Church in the USA, Chair of the Board for Toronto School of Theology, University of Toronto and adjunct professor for The Graduate School of The Union Institute, Cincinnati, Ohio.

He is widely published in areas related to organisational behaviour, professional development, personal development and ethics.

Current focus of his research is the relationship between executives' and corporate professionals' work and their social and spiritual health and well-being. Recent executive development programs offered include *Exercising Authority with Integrity*, *Life Integration & Assessing Capability and Potential*.

Academic Degrees & Professional Certifications:

D.Min. - Theology, S.T.M. - Ethics, M.Div. – Theology, B.A. – Psychology, Certified Life Orientation Analyst, Certified Intensive Journal Facilitator

**Charlotte Bygrave**  
**Vice President Human Resources**  
**Capelle Associates Incorporated**

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Charlotte Bygrave is a consultant with 25 years of experience in creating and leading strategic human resource management functions in multi-national firms in the pharmaceutical, financial and retail industries.

As a Vice President Human Resources, she worked with executive teams to develop and implement new organization designs, facilitate strategic change including mergers and acquisitions and develop and implement integrated human resource systems to improve organizational performance and business results.

Charlotte has a Bachelor of Science Degree from the Pennsylvania State University.

She is Vice President at Capelle Associates in Toronto and is a member of the Sherbourne Health Center Board of Directors.Academic

Degrees & Professional Certifications:  
 BS - Pennsylvania State University, United States

**Piet Calitz**  
**Managing Director - BLOSS International Limited**

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Piet is MD of BLOSS International Limited, registered in the UK.

BLOSS has a proud history dating back to 1967, with a footprint that includes Australia, Africa, Asia, the Americas and Europe. BLOSS was started when Dr. Elliott Jaques founded the Brunel Institute of Organisation and Social Studies (BLOSS) on the Brunel University campus. The members of the BLOSS community work in partnership with national as well as multi-national organisations operating across most industries, public sector organisations and voluntary / not-for-profit institutions.

In his global role, Piet is challenged by global / regional differences across divergent host cultures with regard to inter alia commercial arrangements, maintaining ethics and standards of the use of the BLOSS technologies by licensed partners. Extending the global footprint of BLOSS and encouraging the appropriate use of the technologies is a key strategic driver of the business and a core focus of his energy.

Piet is an innovative pragmatist with a philosophical bent, and believes in healthy traditions. Previous experience includes OD, generalist HR and consultant positions, as well as serving as MD and later as Chair of BLOSS Southern Africa.

His approach is aimed at encouraging reflection and insight, often by challenging mindsets and assumptions.

Academic Degrees & Professional Certifications:  
 Masters - Industrial and Organizational Psychology

## Ronald G. Capelle

### President - Capelle Associates Incorporated

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Ron Capelle, PhD., is an international expert in the assessment and implementation of organization design. With more than 25 years of experience, Ron has consulted with a wide variety of national and international organizations including advanced technology, financial services, communications, health care, manufacturing, oil & gas, retail, transportation, and all levels of government. Ron's extensive research into organization design and uses the data to offer clients a customized, proven approach to strategic organization design.

He has written Changing Human Systems. This best seller has been used in over 50 college and university courses. His views on organization design were recently profiled on World Business Review, a tv series hosted by Alexander Haig, and previously on The Executive Forum, a tv show hosted by (former Apollo 13 Commander) Jim Lovell. He is a frequent conference presenter, and has written articles for professional journals.

#### Academic Degrees & Professional Certifications:

Ph.D. - York University, Toronto, Canada ,Certified Management Consultant (CMC) , Certified Organization Development Consultant ,Registered Psychologist (CPsych) ,Certified Human Resources Professional (CHRP).

## Richard Leigh Clifford

### Director/Chief Executive -Rio Tinto PLC

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Leigh Clifford is a qualified mining engineer with an honours degree in Engineering and a masters degree in Engineering Science from Melbourne University. He joined the Rio Tinto Group at Broken Hill, New South Wales in 1970 where he has occupied a wide variety of operational and marketing roles in the coal and metalliferous operations of the Group.

In 1994 Leigh was seconded to Rio Tinto in London as mining director where he was actively involved in the Group's businesses in the US, Africa, Indonesia and South America. He subsequently returned to Melbourne in 1996 as managing director of Rio Tinto Limited. In 1999, he returned to the UK as chief executive of Rio Tinto's global Energy product group. He has been a director of Rio Tinto plc since 1994 and was appointed chief executive of Rio Tinto in April 2000.

For a number of years he was a member of the Coal Industry Advisory Board of the International Energy Agency, and was its chairman from 1998 to 2000. Leigh was a director of the New Orleans based Freeport-McMoRan Copper & Gold for a number of years, until Rio Tinto's sale of their shareholding in 2004. He is currently a non-executive director of Barclays Bank plc.

#### Academic Degrees & Professional Certifications:

- Engineering (Hons)
- Masters - Engineering Science - Melbourne University, Australia

## Michelle Malay Carter

### Director of Learning & Client Services - PeopleFit

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 United States 27612  
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Michelle Malay Carter has over ten years experience in training, development, and organizational development, as well as several year's professional experience in fields of marketing, advertising, and communications. During her career, she has served clients as an internal, external, and independent consultant in small organizations and within one of the world's largest.

Also an author and speaker, Ms. Carter's writing has been featured on HR.com, and she served as a visiting lecturer in NC State University's Department of Communications. Ms. Carter's graduate thesis related her experiences applying Requisite Organization principles to create a thorough succession plan within a sales department of several hundred.

#### Academic Degrees & Professional Certifications:

BS - Journalism/Advertising - Kent State University, United States , MA - Organizational Development - NC State University, United States , Certificate - Organizational Development - UNC-Charlotte, United States

## Stephen D. Clement

### President/Founder - Organizational Design, Inc. (ODI)

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Dr. Stephen D. Clement is founder and President of Organizational Design, Inc. of San Antonio, Texas. He is the co-author with Elliott Jaques of *Executive Leadership, A Practical Guide to Managing Complexity* (1991), in which he discusses leadership development and its effects on the design of organizations. As a consultant to industry, Dr. Clement specializes in the application of basic design principles to the organization of work including key work related processes, and the underlying leadership and management skills required to perform such work effectively.

Dr. Clement's career as an organizational and leadership expert began at the United States Military Academy. At U.S.M.A., Dr. Clement taught courses on leadership and was Director of Research in the Leadership Department. Throughout a distinguished military career, Dr. Clement designed and developed the Army's current leadership and human resource development program. He has designed executive level leadership and management development programs and has lectured and consulted throughout the world.

#### Academic Degrees & Professional Certifications:

B.S. - Engineering - The United States Military Academy, West Point, N.Y, United States, 1965., M.S. - Industrial Relations - Purdue University, Lafayette, Indiana, United States, 1971. ,Ph.D. - Organizational Communications - Purdue University, Lafayette, Indiana, United States, 1973.

## **Kenneth Craddock**

### **Consultant**

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Ken Craddock is a consultant specializing in requisite organization and in quality. He provides support to managers for organizational transformation to increase effectiveness and improve strategy.

In the early 1990s Craddock was assistant to W. Edwards Deming, the man who gave quality to the Japanese. He has consulted to firms of varying sizes, including a Fortune 100 firm, where he trained mid-level managers on creative thinking in week-long sessions. He has also worked as an analyst and management planner, as a consultant for metropolitan government, and supervised development of a PC-based tracking system to monitor services provided to clients. As a management planning analyst, he developed the first MBO business plans for 16 offices, with 2300 staff and \$146 million budget.

While at Columbia he initiated surveys which led to the first revision of the business school curriculum in 30 years. Ken has published 8 articles and papers and has made several conference presentations.

Academic Degrees & Professional Certifications:

- M.A. - Business History (Thesis: *Requisite Leadership: A Neglected Model of Organization Effectiveness*) - Columbia University, New York City, United States , M.P.A. - Management - Kennedy School at Harvard University, Massachusetts, United States

## **Mark Cutifani**

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**Barry Deane**

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## Maurice Dutrisac

### President - MasterMind Solutions Inc

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Maurice Dutrisac provides a full range of services in the area of strategic planning, organizational design and structure, organizational rightsizing, process re-engineering, health and safety and labour relations, leadership and talent pool development, assessment of managers, knowledge management and strategic human resources management.

Maurice has over 25 years of senior level human resources, operational and administration experience with large, complex manufacturing, service and resource based corporations in Canada and the United States.

Prior to becoming a consultant, Maurice was a Vice President, with Inglis Limited, Southam Newspaper Group, Fisher Products Group (a group of 6 diverse companies) based in Pittsburgh and Domtar Inc. in Montreal. He is also experienced in the public sector having served for 3 years on the Board of Directors of the Workplace Safety and Insurance Board.

Maurice is fluent in French and English. He is the immediate Past-President of the McMaster University Business School Alumni Association and is on the Advisory Board of the School of Business. He also serves on Advisory Boards for private companies and serves as a Management Representative on Boards of Referees for Employment Insurance Appeals.

#### Academic Degrees & Professional Certifications:

MBA - McMaster University - Hamilton, Ontario Canada, BA - McMaster University - Hamilton, Ontario Canada

## Julian Fairfield

### Managing Director - Bach Consulting

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Julian Fairfield, the author of "Levels of Excellence", has had a varied career.

Initially spending six years in manufacturing in the USA, he moved on to join McKinsey and later the Boston Consulting Group. While with McKinsey in Australia he was made aware of Elliott's work and was responsible to Sir Roderick Carnegie for initial implementation and development of RO at CRA.

Moving to Japan he studied Japanese management practices after which he returned to Australia with a Japanese wife and family. In Australia, he founded Bach Consulting, a practice that specialised in Organization and Strategy work for large corporate and government clients.

Reducing his consulting activity, he now also owns and operates two import businesses and is writing a book on Human Behavioural Evolution.

#### Academic Degrees & Professional Certifications:

*unavailable*



## **Jack Fallow**

### **Director - Centre for Organisation Effectiveness Ltd**

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Jack Fallow has a portfolio approach to his work, most recently balancing the chairmanship of an engineering services company with an active consultancy practice. He was a trustee and director of Bioss for eight years.

His early career was in British Steel. Active in the trade union, he eventually became an Industrial Relations Officer. In 1978, He joined British Gas as personnel manager where he held director level posts in Operations, Human Resources, Service and International Strategy. He originated the concept of a Company Charter to integrate Governance, Strategy, Values and Behaviour. From BG, he was seconded to the UK government Home Office. In May '96, he founded GasForce Ltd, an employee owned business.

Jack is also involved in Strategy, HR and Business Excellence consultancy. He is a founder director of The Centre for Organisation Effectiveness and Chairman of Newloop Ltd, an interactive media and TV production company. His newest role is as Development Director of Sepha Ltd, a Northern Ireland company specializing in Blisterpacking for the pharmaceutical industry.

In 2003/4 he was a co-chair of the UK Cabinet Office's Top Management Programme.

Academic Degrees & Professional Certifications:

BA M University

## **Donald V. Fowke**

### **Managing Director - New Management Network**

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Don is an experienced consultant in strategy, organization and people development using the concepts of Global Organization Design.

He has assisted in defining business strategy and business plans for companies in a variety of industries, designed organization structures ensure implementation and follow through on the strategy, assessed executives and managers against the needs of the new roles, implemented Talent Pool systems to ensure development of talent and succession planning for the future.

Where needed, he has designed and implemented compensation plans to assure alignment of incentives and "felt fair" rewards throughout the organization.

In his consulting career, Don has been Chairman and CEO of Hickling-Johnston Limited, Managing Director of William M. Mercer and is currently with the New Management Network.

Academic Degrees & Professional Certifications:

BE SM P Eng

## Jerry L. Gray

### Dean Emeritus and Senior Scholar -I.H. Asper School of Business The University of Manitoba

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Dr. Jerry Gray is Dean Emeritus and Senior Scholar of the I. H. Asper School of Business at the University of Manitoba where he held the CA Manitoba Endowed Chair in Business Leadership. He has taught management and organizational behavior at the University of Manitoba since 1970, where he was Head of the Department of Business Administration from 1974 to 1982 when he was appointed Associate Dean of the Faculty. He was Dean of the Asper School of Business from 1996 to 2004.

Dr. Gray is a Director of Gendis, Inc., GP Inc., The Institute of Chartered Accountants of Manitoba, and CentreVenture, Inc. Dr. Gray is also an honorary Certified General Accountant, an honorary Certified Management Accountant and an honorary Chartered Accountant.

Dr. Gray's publications include articles on organizational design, employee motivation, leadership, and management development. He has also written four books in the areas of organizational behavior and supervision, including *The Glacier Project: Concepts and Critiques*.

As President of J.L. Gray & Associates Ltd., a consulting firm specialising in human resource development, Dr. Gray has consulted with many major corporations in the United States and Canada in the areas of motivation, organisational design, manpower planning, managing change, incentive system design, customer service, and strategic planning.

Academic Degrees & Professional Certifications:

Ph.D.

## Judy Hobrough

### Managing Director - Bioss Europe

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A graduate of Brunel and London Universities, Judy Hobrough has worked as a consultant within the area of people and organisational development for many years. She has extensive international experience having lived and worked in a number of different continents including Africa, North America, Europe, Australasia, South East Asia and China.

She has built a broad-based experience in helping organisations to design the most effective structure to achieve their corporate objectives, developing human resource strategies, and redesigning roles. She has also provided support to multinationals in the whole area of their leadership pipeline, succession planning and talent management programmes, advising on career paths and development plans.

Judy Hobrough sits on the Board of Bioss International and is MD of their European operations. Judith is a Chartered Psychologist and a member of the Occupational Division of The British Psychological Society. She is a practitioner and trainer in Career Path Appreciation (CPA) and a qualified administrator and interpreter for a wide range of other tools and psychometrics.

Academic Degrees & Professional Certifications:

B.Sc.(Hons) - Psychology M.Sc. - Occupational Psychology C.Psychology

## Paul Holmström

### Management Consultant - Paul Holmstrom Management AB

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 Sweden SE43141  
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Paul Holmstrom has extensive industrial experience after 15 years with Volvo, Saab and BASF. He worked in both managerial and executive functions within marketing, business development and strategic planning. Since 1988 he has been active as a consultant initially primarily with change management, lately mainly working with organizational audits, design and effectiveness. He has consulted with industry, services and public authorities, since 1996 extensively within health care.

In the early nineties Paul was trained in systems theory and the viable system model, as described by Stafford Beer. Shortly afterwards, he was introduced to Requisite Organization by CPA-trained colleagues. Since then he has used systems theory and RO principles in several organizational studies and interventions. He has had the opportunity to attend short seminars held by Elliott and had a personal workshop with Elliott Jaques.

Paul has recently started work on a Ph.D. in systems thinking and system dynamics and teaches part time at the University. He has always seen his role as to bridge the academics and the practice. He is bilingual English/Swedish.

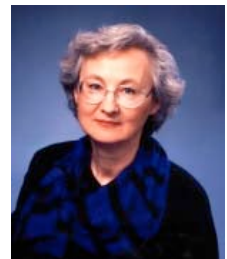
#### Academic Degrees & Professional Certifications:

Bachelor of Business Administration Masters - Systems Thinking and Modeling

## Ruth Hubbard

### Senior Partner - Invenire

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A senior partner in Invenire ([www.invenire.ca](http://www.invenire.ca)), Ms. Hubbard moved to private consulting practice after a distinguished career in the Canadian public service where she served as Deputy Minister in a number of federal government ministries including, Supply and Services, Employment and Immigration, Revenue Canada (Customs & Excise), and as the Master of the Royal Canadian Mint.

She was President of the Public Service Commission from 1994 to her retirement in 1999. Since then Ms. Hubbard joined the Centre on Governance at the University of Ottawa as a Senior Research Fellow and has been very active in advising on and studying the public sector management and the management of social systems in the public and not-for-profit sectors nationally and internationally. She is also a teacher, writer, and a professional coach of senior executives.

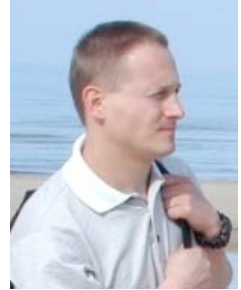
Ruth Hubbard is a past Board member of the Commonwealth Association of Public Administration and Management and is currently a member of the Honorary Board of Directors of the Public Policy Forum of Canada as well as various community-based voluntary organizations including Leadership Ottawa.

#### Academic Degrees & Professional Certifications:

Masters - Mathematical Analysis - Ohio State University, United States Bachelors - Mathematics, Chemistry, Spanish - Queen's University, Kingston, Ontario Canada Advanced Management Program - Harvard University, Massachusetts United States

**Sergey Ivanov****Doctoral Student - The George Washington University**

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Sergey Ivanov is a doctoral fellow at The George Washington University's School of Business in Washington, D.C., U.S.A. His expertise include management consulting and design practices based on the general theory of managerial hierarchy (formerly known as Stratified Systems Theory and Requisite Organization Theory) developed by Dr. Elliott Jaques.

Sergey Ivanov has consulted with several national and international corporations in the United States and Europe (Latvia) analyzing corporate structures for effectiveness, evaluating roles, capabilities (human potential), and providing recommendations to clients of the most effective management structure in their line of business (including other aspects of internal organizational design).

Besides active consulting, Mr. Ivanov conducts consultancy-based research and has presented and published at major national and international conferences, as well as he has been an invited speaker at major universities on the topic of management. Mr. Ivanov is bilingual, natively fluent in English and Russian, and presently resides in the United States, Washington, D.C.

Academic Degrees & Professional Certifications:

Unavailable

**Sean Jackson****CEO Meridian Credit Union**

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**Mark V. Kaminski****CEO (retired) Commonwealth Industries Inc. - Self Employed  
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Mark V. Kaminski is the retired President and Chief Executive Officer of Commonwealth Industries, Inc. CII is a leading manufacturer of innovative electrical wiring products and one of North America's leading manufacturers of aluminum sheet for the distribution, transportation, construction and consumer durables end-use markets. Mark became President of Commonwealth Aluminum in April 1991 after serving as Vice President and GM of Operations.

He joined Anaconda and ARCO Aluminum, based in Louisville, Kentucky, and held several positions in sales, marketing and operations management. Mark was assigned to the project team to start-up the \$600 million rolling mill in Logan County, Kentucky with the start-up phase being completed in June 1987. Due to his business and civic contributions, Mark has been recognized as a member of the Honorable Role of Kentucky Colonels.

Mark joined Commonwealth Aluminum Corporation in 1987 as Industry Marketing Manager. In February 1988 he was assigned to an Organizational Development team and in 1989 Mark was appointed Vice President & General Manager of Operations for Commonwealth Aluminum in Lewisport, Kentucky.

Civic involvement includes past service on the Boards of Indiana University and ARM Financial. He is currently serving on the Board of Secat, Inc., a business conceived and dedicated to facilitating research and development of innovative technology, processes and products for the aluminum industry.

**Academic Degrees & Professional Certifications:**

Bachelor Degree in Science - major Business, minor Science - Indiana University, United States, 1977 Advanced

Management Degree - Harvard Business School, Massachusetts United States, 1994

## Michael A. Kirby

### Executive Director, Institutional Army Transformation

United States

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Mike Kirby joined Secretary Francis Harvey's management team at HQDA on the 10th of June 2005 as the Executive Director, Institutional Army Transformation. He is responsible for implementing Secretary Harvey's business transformation initiatives. Launched by MG Ross Thompson these efforts include the training of senior leaders in the management skills of designing and implementing lean six sigma management programs. He is also responsible for implementing the Secretary's game plan for creating efficiencies throughout the Institutional Army.

Previously, Mr. Kirby was Business Development Deputy of Mission Systems, at Northrop Grumman, a \$4B sector of Northrop Grumman Corporation focused primarily on complex systems integration for defense and intelligence customers. He led the resource allocation process for bidding and development funds and managed company-wide business development initiatives. Additionally, he served as a consultant to the U.S. Army Science Board.

Mr. Kirby joined Northrop Grumman through the TRW acquisition and joined TRW through the acquisition of BDM. At both TRW and BDM, Mr. Kirby organized, staffed, created and merged business development structures and processes. At BDM, he also had responsibilities in line management, software development, and process engineering for a variety of federal, civil and commercial clients in the test and evaluation, logistics, and command, control and intelligence markets.

Prior to joining BDM, Mr. Kirby served as a combat arms officer in the U.S. Army. His last assignments included tours as the Executive Assistant to the Army Chief of Staff and as the leader of the Ground Maneuver Joint Warfighting Capability Assessment for the Joint Chiefs of Staff, JS.

#### Academic Degrees & Professional Certifications:

BS - Engineering - U.S. Military Academy, West Point, United States MS - National Security Strategy - National War College, United States MBA - Harvard Business School, Massachusetts, United States

## Herb Koplowitz

### President - Terra Firma Management Consulting

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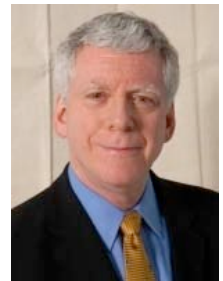
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Herb Koplowitz, PhD, is President of Terra Firma Management Consulting.

Terra Firma helps organizations develop the structure, staffing and leadership they require to build trust and reach their strategic goals.

Herb specializes in helping employees, managers and executives learn ways of talking and thinking about organizational issues that help them find more effective solutions to their problems.

His consulting has been grounded in Global Organization Design concepts since 1990.

#### Academic Degrees & Professional Certifications:

BA - Mathematics and Philosophy - Cornell University, New York, United States PhD - Psychology - University of Massachusetts, United States Registered Psychologist - Ontario, Canada

**Gerald A. (Gerry) Kraines**  
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Gerald A. Kraines, M.D., (Gerry) is president and chief executive officer of The Levinson Institute, a global management-consulting and leadership-development firm, headquartered in New England. Dr. Kraines has over 15 years of proven success in transforming business organizations into highly effective, fully accountable vehicles for creating significant shareholder value. His recent book, *Accountability Leadership*, combines common sense with scientific knowledge to create a blueprint for a total managerial leadership system. Dr. Kraines has worked with senior executives from over 100 national and multinational organizations, both in the private and public sectors.

Dr. Kraines's lifelong interest in public health has guided him to his current philosophy: *financially successful work organizations that help employees realize their full potential have an equally positive effect on the emotional and economic health of their employees' families and communities.*

**Academic Degrees & Professional Certifications:**

B.A. - Oberlin College, Ohio United States, 1965 M.D. - Case Western Reserve School of Medicine, Ohio United States, 1969 Medical Internship - University of New Mexico Hospitals, Albuquerque, New Mexico United States, 1970 Psychiatric Residency - Harvard Medical School, Boston, Massachusetts United States, 1973 Fellowship - Community Psychiatry - Harvard Medical School, Boston, Massachusetts United States, 1973 Faculty - Department of Psychiatry - Dartmouth Medical School, United States, 1973-6 Faculty - Department of Psychiatry - Harvard Medical School, Boston, Massachusetts United States, 1980-present

**Lisa Lechowicz**  
**CEO & Founder - HDM Corporation**

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**Nancy R. Lee****President - Requisite Organization Associates, Inc.****Lee Cornell Associates**

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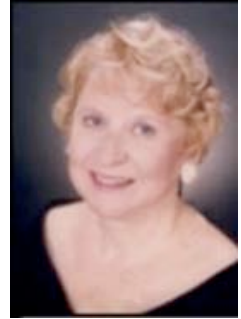
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Nancy Lee is president of Requisite Organization Associates, Inc, and Lee Cornell Associates, firms specializing in helping organizations understand and utilize effective structure, staffing and managerial practices. She has extensive experience as a corporate manager and as a consultant to senior management in the areas of organization design, human resource development, succession management, management education, marketing and information technology.

Ms. Lee began her career in the Human Resources Department of General Electric Corporation's Advanced Electronics Center. She next spent five years working in HR, Training, Advertising and Public Relations at Macy's New York and then became Marketing Manager for Wedgwood, the English china manufacturer. Ms. Lee managed a firm consulting in information technology for ten years and founded her own companies specializing in requisite organization consulting in 1993.

Doubleday and Ballantine Books have published Ms. Lee's book on management development, Targeting the Top. She has recently completed an educational guide to requisite principles and practices and has a book in progress entitled, Accountable Management.

Nancy Lee has been a speaker at major conventions such as the American Bar Association, American Institute of Banking, and the American Management Association addressing issues of organization structure and management practice. She has taught management courses throughout the U.S., the U.K. and Australia and at Simmons College in Boston and the Pacific Coast Banking School at the University of Washington in Seattle. She has been a resource participant at the Aspen Institute and a trustee of Russell Sage College.

She was graduated with honors from Cornell University where she was a National Scholar and was elected to Phi Kappa Phi. She attended the graduate School of Management at Boston University. Ms. Lee is listed in Who's Who in America 2004 and Who's Who in the World 2004.

Academic Degrees & Professional Certifications:

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**Peter Mackenzie-Smith**  
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A graduate of University College London, Peter has held senior line positions in multinational organisations across a number of different industry sectors including utilities and packaging. His roles have included Management Development Director and Director for Development and Resourcing where he had responsibility for the full range of management and organisational development activity from graduate recruitment to top team development and succession. He was accountable for strategy through to ensuring effective implementation. He has traveled extensively within Europe and the Middle East and Africa as well as undertaking consulting work in Canada for a multi-national client.

Over the last five years Peter has developed broad based consulting experience in the areas of organisational and people development. This experience has included providing strategic input into the talent management programmes of a number of multinational organisations, designing and developing development centres to identify future senior executives, and providing strategic planning support and advice to a large national charity in the UK. He also provides coaching and mentoring to senior executives in a range of international organisations.

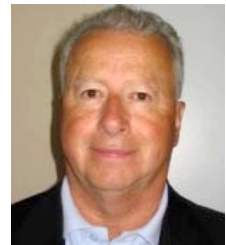
Peter Mackenzie-Smith has worked with Bioss Europe as a Senior Associate since 2000. He is a practitioner and trainer in Career Path Appreciation (CPA) and a qualified administrator and interpreter for a wide range of other tools and psychometrics.

Academic Degrees & Professional Certifications:

BA (Hons) - English - University College London ; AM CIPD.

**Robert (Bob) MacPhee**  
**President - Business Innovations Corporation**

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Bob is a management consultant specializing in business process optimization, governance and service delivery, corporate/business planning and project management. He has 25 years of experience in the public sector and 10 years of experience in the private sector.

Bob has held several senior positions in the Government of Canada, including being the first CEO of the Passport Office, and is currently President of Business Innovations Corporation.

Academic Degrees & Professional Certifications:

Bachelor of Science - Mathematics and Computer Science - Sir George Williams University, Montreal, Quebec Canada

## Alistair Mant

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## Judith McMorland

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Judith has thirty years' teaching, consulting and research experience mainly in the field of change management, and organisational learning. A Senior Lecturer, in the Department of Management and Employment Relations, the University of Auckland School of Business, Judith is also Director of CO-LEARNZ Ltd. a management consultancy. Over the last five years, Judith's focus and interests have been in capacity and capability development, using the levels of work framework in organisational development and senior management education. She teaches post graduate students and supervises PhD and Masters' Thesis work in a range of related of topics.

Current projects involving application of the Levels of Work include Management Education with senior executives through the Business School's Corporate Programmes and CO-LEARNZ consultancies; short courses in Capacity, Capability and Challenge, on-going sector development in mental health provision, teaching and facilitation of student consultancy projects within the Organisation Change and Innovation programme in the Master of Commerce.

#### Academic Degrees & Professional Certifications:

BA (Hons) - Sociology - Leeds, United Kingdom , MA (Hons) - Education - Massey, New Zealand , PhD - Sociology - Auckland, New Zealand , DipEd. - Massey, New Zealand , Dip - Youth Work - Manchester, United Kingdom

**Glenn Mehlretter**  
**President - PeopleFit**

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Glenn Mehlretter, founder and president of PeopleFit, established his management consulting firm in 1981. His engineering background led him to appreciate Requisite Organization's predictive, consistent, and reliable approach to organizational engineering. Since 1991, Glenn's work has focused upon translating Requisite Organization theory into practical managerial leadership tools and cutting edge managerial training. Glenn had the pleasure of Elliott Jaques' friendship and tutelage as he developed his RO application tools.

Because of his expertise, Glenn has been invited to consult, speak, and train internationally regarding Complexity of Information Processing Direct Observation, Assessing Organizational Integrity Using RO Criteria, and the PeopleFit Talent Pool Evaluation Process.

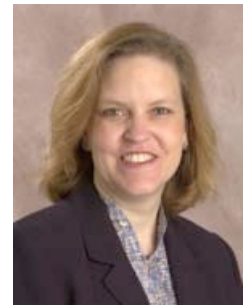
In addition to being a practical way to introduce managers to the concept of work layers and corresponding human capability levels, PeopleFit's talent evaluation process has proven particularly effective in improving the quality of initial staffing decisions during merger and acquisition.

**Academic Degrees & Professional Certifications:**

Ed D - North Carolina State University, United States ; MBA - Amos Tuck School of Business, Dartmouth College, United States ; BSME - Carnegie Mellon University, United States ; Certified Human Patterns Administrator ; Trainer in Malcolm Baldrige Self-Assessment ; Professional Engineer: Pennsylvania & North Carolina

**Lois Melbourne**  
**President/CEO - Aquire**

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Lois Melbourne co-founded TimeVision, now known as Aquire, in 1994 as a software development and corporate training company. The company has received numerous awards recognizing its growth, product quality and service record. Lois takes a people first approach to corporate leadership, she feels the leaders that create work environments focusing on the people aspects of business are to be admired.

Prior to founding Aquire, formerly TimeVision, Lois held the position of director of operations at a national systems integration company, provided technology training instruction to corporate America, and served as a media buyer, sales and marketing executive and film production specialist.

Lois has authored articles for several publications and is a member of the National Association of Women Business Owners and the Young Entrepreneurs' Organization, International Association for Human Resource Information Management and Society for Human Resource Management. In addition, Lois serves as co-chair for the TechCEO Roundtable.

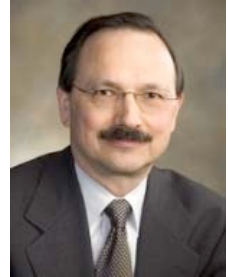
**Academic Degrees & Professional Certifications:**

BA - Interdisciplinary Studies - University of Texas at Arlington

## **Dwight Mihalicz**

### **Senior Vice President -Capelle Associates Inc.**

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Dwight Mihalicz has over 25 years of organization experience. This includes a variety of management positions in both Canada and abroad. He has developed and managed global enterprises. He has also been responsible for managing the global redesign of the international operations of an organization in over 60 countries. He has maintained Directorships in European based organizations, and is the Chairperson of UNICEF Canada.

Dwight Mihalicz has extensive experience in change management processes with national and global organizations. He also has experience in the development and start-up of new operations with national and global mandates.

#### Academic Degrees & Professional Certifications:

MBA - Master of Business Administration - University of Ottawa - Ottawa, Ontario Canada ;  
CMC - Certified Management Consultant

## **Beverly J. Nyberg**

### **Adjunct Professor - Graduate School of Education and Human Development The George Washington University**

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Beverly J. Nyberg is currently a professor at the Graduate School of Education and Human Development at The George Washington University, as well as a professor at the Washington International Management Institute, both in Washington, DC. She also provides consulting through Common Root Consulting also based in DC. She has over thirty years of experience working with non-profit service agencies, much of which has been in an international setting. She has directed international programs in over 16 countries and spent 10 years working and living in developing countries (mainly Democratic Rep. of Congo) with extended stays in Europe and the Middle East.

Her primary foci have been on education and social service delivery. Her desire is to strengthen the capacities of social service agencies to better address global needs.

#### Academic Degrees & Professional Certifications:

Doctor of Education - Human and Organizational Studies - The George Washington University, Washington, DC. United States. Dissertation: The Impact of Person-Job and Person-Superior Fit on Employee Satisfaction ; Master of Arts - Counseling Psychology - Trinity Divinity School, Deerfield, Illinois United States. Thesis: The Dependence/Independence Struggle between Parent and Adolescent ;Certificate - Leadership in Technology Integration - Teacher Technology Leadership Project, The George Washington University, Washington, DC. United States ; Appreciative Inquiry, an organization development approach ; Personal work style evaluation instrument (called DISC)

## **Robert (Rob) W. Pearce**

### **President & Chief Executive Officer, Personal & Commercial Client Group - BMO Bank of Montreal**

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Robert W. (Rob) Pearce was appointed to the position of President and Chief Executive Officer, Personal & Commercial Client Group effective October 1, 2002. He is responsible for all personal and commercial banking services in Canada. Mr. Pearce also serves on BMO Financial Group's ten-member Management Board Executive Committee.

His previous leadership role was as President, Personal and Commercial Banking Distribution, where he was responsible for distribution of personal and commercial banking services throughout Canada, specifically BMO Bank of Montreal branches (including in-store locations), telephone and internet banking.

Prior to that, Mr. Pearce was Executive Vice-President, North American Electronic Banking Services and was responsible for the MasterCard Cardholder and Merchant Services lines of business, the debit card business and emerging new technologies in Electronic Banking.

Mr. Pearce is Chair of the Executive Council of the Canadian Bankers Association and a director and member of the Audit & Compensation Committees of MasterCard International. His community involvement includes directorships at CanadaHelps.org and Kids Help Phone.

#### Academic Degrees & Professional Certifications:

Masters of Business Administration - University of British Columbia, Canada

## **W. Joseph Privott**

### **CEO - Privotts LC**

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W.J. (Joe) Privott has been CEO of Privotts LC, a consulting practice, since retiring in 1999 as President and Chief Executive Officer of Novus International, Inc. Novus International is a private global specialty chemical company headquartered in St. Louis, Missouri.

From 1964 until Novus was formed in 1991, Dr. Privott held various technical and management positions in Monsanto's New Enterprise Division, Chemical Company and Agriculture Company. He was named as Novus' first President and Chief Operating Officer in 1991 and in 1994 became President and Chief Executive Officer.

Dr. Privott is Chairman of the Missouri Baptist Medical Center Board of Trustees and a Vice Chairman of the BJC HealthCare Board. He is also a Board member of Friendship Village Retirement Homes. He previously served on the Boards of the National Chicken Council, Maryville University and the Alumni Council for North Carolina State University's Chemical Engineering Department.

A native of Edenton, North Carolina, Dr. Privott is a graduate of North Carolina State University with a B.S. and Ph.D. in Chemical Engineering.

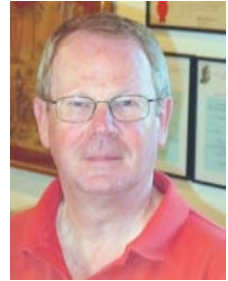
#### Academic Degrees & Professional Certifications:

B.S. - Chemical Engineering - North Carolina State University, United States ; Ph.D. - Chemical Engineering - North Carolina State University, United States

## **Richard Sale**

### **Managing Director - EDAC**

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Richard Sale is the Managing Director of EDAC, the Internet-based Executive Development Assessment Centre. EDAC offers advanced computerized assessments globally via the Internet in support of corporate and consultancy HR practitioners interested in the identification of potential and the development of individuals.

Working with its strategic partners Bioss International, EDAC has developed and refined a suite of computerized assessments covering psychometrics, potential and performance. The EDAC methodology is based on the separation of the assessment process from feedback, using the Internet to facilitate the former, but maintaining the traditional face-to-face delivery of the latter. This rigorous discipline offers an ethical, professionally sound and cost-effective approach to executive assessment.

Richard has a military background, having served for 30 years in the British Army as an infantry commander, in a milieu where effective leadership and the ability to handle complexity and uncertainty are of the utmost importance, and where the indications of failure are unambiguous and painful.

#### Academic Degrees & Professional Certifications:

Graduate - Canadian Forces Command and Staff College, 1980 ; Master of Defence Administration ( MBA equivalent) - Cranfield University, UK, 1990 ; Occupational Testing Certificate - British Psychological Society, 1993

## Ken Shepard

### Principal - Canadian Centre for Leadership and Strategy

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Ken Shepard, PhD., is the Principal of the Canadian Centre for Leadership and Strategy. Ken specializes in coaching to senior leaders, top management team building, strategy formulation and implementation, organizational design and installing effective accountability structures and management practices. Ken has worked with CEO's, Deputy Ministers, and second-in-command responsible for major change projects. At the international level, he has worked at the Deputy Minister level in Saudi Arabia, and with senior managers in Israel and the United States.

He founded the management of change program at the Niagara Institute and directed it for a decade before leaving to found the Canadian Centre. In that role he benchmarked best practices at major Canadian corporations and designed a wide-range of senior management development programs at the VP level.

Ken's practice is largely based on Requisite Organization concepts developed by Elliott Jaques complemented by state-of-the-art organization development processes. Ken met Dr. Jaques in 1977, brought him to Toronto in 1992 and produced a series of public workshops introducing these concepts to senior consultants and line managers. Dr. Shepard designed, staffed, and produced over 3500 participant days of Requisite workshops with Dr. Jaques. Over this time Ken developed a close working relationship with Dr. Jaques and benefited from his advice on his major consulting projects. Now, following Dr. Jaques's death last year, Ken is the Founding President of the Global Organization Design Society, a world-wide professional association of academics, business users, and consultants practicing the application of Requisite Organization concepts.

#### Academic Degrees & Professional Certifications:

Ph.D. - Management - Andersen School of Management, UCLA, United States , M.C. P. - University of Pennsylvania, United States , Certificate - Natural Resource Evaluation - OAS, Brazil.

## Anne Stephen

### Vice President - Organization Design and Performance Effectiveness - BMO Financial Group (Bank of Montreal)

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Anne Stephen is the Vice President of Organization Design and Performance Effectiveness for BMO Financial Group. She is accountable for building strategic capability and competitive advantage by ensuring the Bank's organizational structures, performance management frameworks and managerial leadership practices enable high performance and effective strategy execution.

Anne has experience as both an internal and external consultant working with major Canadian and US companies such as Apple, IBM, Canadian Pacific Railway, George Weston, Loblaws, Canadian Tire, Aetna Insurance, Merrill Lynch HSBC and Royal Bank Financial Group.

Anne is known for her thought leadership and pragmatic approach to navigating organizational change through large and complex systems.

#### Academic Degrees & Professional Certifications:

unavailable

## Louise Stratford

### President - BLOSS North America Inc.

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Louise was a full member of the Institute of People Management and sat on its Organizational Development/ Transformation Special Interest Group. She is a qualified Psychometrist, Assessment Center Facilitator, Iris (Initial Recruitment Interview Schedule - for which she is a qualified trainer), and CPA (Career Path Appreciation) Practitioner, as well as a Levels of Work Auditor. She has presented papers on Culture Fair Assessment, Mentorship, Action Learning and Talent Mapping and Succession Planning at various public conferences in both South Africa and the USA, including the 2005 ASTD Conference.

Since 1984, she has gained experience, working primarily for manufacturing organizations within the Steel and Pharmaceutical Industries, in Individual, Team and Organizational Development. In 1994, she established her own human resource consultancy, Strategic HR cc, where she was the founder and Managing Member.

In October 2004 she established BLOSS North America Inc. part of a global consulting organization looking at the match between individuals within an organization and the work that they do, where she is the President.

#### Academic Degrees & Professional Certifications:

B.Sc. - Industrial Psychology - University of Witwatersrand, Johannesburg, South Africa ,HDPM - Higher Diploma in Personnel Management - Graduate School of Business Administration - University of Witwatersrand, Johannesburg, South Africa ,MM - Masters in Management, cum laude - Graduate School of Business Administration - University of Witwatersrand, Johannesburg, South Africa.

## Allen Sykes

### Freelance Consultant

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Allen Sykes is a former managing director of Consolidated Gold Fields, has held senior positions in a number of major British based international companies, particularly in the capital intensive industries of mining, energy, natural resources and transport. He has also held a number of international non-executive directorships.

He was co-author with A J Merrett of the influential best seller *The Finance and Analysis of Capital Projects*, which was a pioneer in the introduction of modern financial and risk analysis techniques. He is the author of *Capitalism for Tomorrow - Re-Uniting Ownership and Control*, published by Capstone in July 2000. With Robert Monks, he was the co-author of the November 2002 booklet, *Capitalism without Owners will Fail: A Policymaker's Guide to Reform*, published in New York and London by the Centre for the Study of Financial Innovation (CSFI).

The reform of Anglo-American shareholder capitalism - the return to its successful roots to be responsive to the long-term interests of its individual and beneficial shareholders - and thus, of the main stakeholders and of society in general, is one of his main interests.

#### Academic Degrees & Professional Certifications:

unavailable



## April Taggart

### Vice President HR Personal & Corporate Banking Services - BMO Bank of Montreal

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## Lawrence G. Tapp

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An International Chief Executive Officer, innovative educator and sportsman, Larry Tapp received his education at McMaster University and the University of Kansas. Mr. Tapp led, in both Europe and North America, one of the world's premier packaging organizations as CEO. This was led through a successful management buyout.

From 1995 to 2003 Mr. Tapp held the position of Dean, the Richard Ivey School of Business, at The University of Western Ontario in London. He transformed Canada's leading business school from a mid-level regional school into an internationally recognized institution consistently ranked as one of the best in the world. Under his leadership, the Richard Ivey School of Business expanded into Asia with the founding of a Hong Kong campus. Recognizing the need for an increased role for business in the formation of public policy, Tapp founded the Ivey Public Policy Institute to promote the active involvement of Canada's business elite in the formation of policies that will lead to a stronger Canada in the 21st century. He retired as Professor Emeritus in July 2003. He continues to lead the Corporate Governance curriculum and teaching at the business school.

A firm believer in leading by example, Mr. Tapp is currently chair and director on the boards of Automation Tooling Systems Inc., Call-Net Enterprises (Sprint Canada), Comcare Health Services, Talisman Energy and Tapp Technologies Inc. He also serves as a director on the boards of CCL Industries, Mainstreet Equities, Mark Anthony Group, Westcast Industries and the Institute of Corporate Directors. He continues to teach on Corporate Governance at Ivey

Academic Degrees & Professional Certifications:

- LLD.

## **Robert (Bob) Tongate**

### **Retired - Commonwealth Aluminum**

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Mr. Tongate enlisted in the United States Air Force fresh out of high school. The four service years included more exploration while traveling and an awakening that there were many different cultures sharing a common country.

He began his career in the aluminum business January 1973 as a maintenance utility worker and held various positions throughout the following 31 years. These positions included, several machine operator roles, maintenance superintendent, human resources manager, and at the time of retirement in 2004 as the Hot Mill Manager.

Bob Tongate held positions within the United Steelworkers local union, including steward, negotiator, vice-president, and president. Labor representative positions held beyond the local level included serving as a member of the USWA wage policy committee, and president of the area's Central Labor Council.

#### Academic Degrees & Professional Certifications:

Leadership Training - United States Air Force , Associates Degree - Kentucky Business College, Owensboro, Kentucky United States, 1976 , Leadership Training - United Steel Workers of America , Working Together and Train-the-Trainer - MacDonald and Associates.

## **Paul Tremlett**

### **President - COREinternational inc**

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Paul Tremlett is President and a co-founder of COREinternational inc, a management consulting business dedicated to helping executives plan, design, and manage their organizations for outstanding performance. He has an extensive background in complex organization change management, strategic planning, organization restructuring and management education and training. Prior to consulting he held various management roles with Imperial Oil Limited and Xerox in sales, marketing, operations, training, and organization development.

Paul focuses particularly on organization design and redesign. He has helped more than two dozen public and private sector organizations align their work system to more effectively achieve strategic and operational goals, and has provided services in management, organization, and human resources development and effectiveness.

Paul has also designed and facilitated numerous management education, team development, consulting skills, and change management programs.

#### Academic Degrees & Professional Certifications:

B. Comm - University of Alberta, M. Sc - Organization Behaviour - The American University, Washington DC, United States

## **Mark Van Clieaf**

### **Managing Director - MVC Associates International**

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Mark Van Clieaf is Managing Director of MVC Associates International, a leading consultancy in integrating organization / accountability design, succession planning & talent management, and enterprise performance management linked to value for shareholders and society. His research and consulting on Levels of CEO Work, Levels of CEO Capability & Levels of Corporate Governance and the link to shareholder and societal value are recognized worldwide.

Over an 18 year consulting career he has worked with clients on organization structure and job design, succession planning, executive search and enterprise performance management and Pay for Performance in North America, Europe, Middle East, Far East and Africa.

His research and thought leadership has been published in a number of publications including: The Ivey Business Journal , American Journal of Management Development and Corporate Governance Advisor .His appointments include: Guest Lecturer and Researcher, Corporate Governance, Ivey School of Business; Commissioner for the National Association of Corporate Directors, Blue Ribbon Commission on CEO Succession Planning; Founding Member, Executive Selection Research Advisory Board, Center for Creative Leadership.

#### .Academic Degrees & Professional Certifications:

BA - Economics and Business - York University ; Post Graduate Diploma - International Business - York University, Toronto, Canada

## **Edward Waitzer**

### **Chair - Stikeman Elliott LLP**

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Edward Waitzer has served as Chair of Stikeman Elliott LLP since 1999. His practice focuses on corporate finance, acquisition, and restructuring transactions, as well as advising in respect of various public policy and governance matters. His clients include a number of major U.S. and Canadian investment banks as well as corporations seeking to raise capital, restructure, or make acquisitions. He is a member of the firm's Executive Committee and Partnership Board. Mr. Waitzer was Vice President of the Toronto Stock Exchange before joining the firm. During 2003-2004 he lived in Santiago and was special advisor to the Chilean Superintendent of Insurance and Securities.

Mr. Waitzer chaired the Strategy Working Party, which restructured the International Accounting Standards Board. He has served as a member of the Canadian Institute of Chartered Accountants' Task Force on Standard Setting and as a member of the Independent Review Panel on the Comptrollership Function in Canada. He serves as contributing editor or on the advisory boards of various publications, including Corporate Ethics Monitor, Corporate Governance Review, and Financial Regulator.

#### Academic Degrees & Professional Certifications:

LL.M. - Faculty of Law - University of Toronto, Ontario, Canada, 1981 ; LL.B. - Faculty of Law - University of Toronto, Ontario, Canada, 1976 ;Bar Admission - New York, United States, 1985 ;Bar Admission - Ontario, Canada, 1978.

## George Weber

### Executive Director/Chief Executive Officer - Canadian Dental Association

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George Weber is Chief Executive Officer of the Canadian Dental Association (CDA), a professional membership organization that acts as the authoritative national voice of the 18000 plus dentists in Canada and is dedicated to the representation and advancement of the dental profession nationally and internationally.

A seasoned professional with more than 30 years of progressive experience mainly in the not-for-profit sector, Mr. Weber has provided senior level leadership to large Canadian and global organizations. He is Secretary General Emeritus of the International Federation of Red Cross and Red Crescent Societies (IFRC), a global federal body based in Geneva, Switzerland, that directs, coordinates and links the activities of the 180 plus national Red Cross/Red Crescent Societies, a distinction he received following seven years as its Chief Executive Officer. Prior to that he was the Secretary-General and Chief Executive Officer of the Canadian Red Cross Society (CRCS) from 1983 - 1992.

In addition to his current responsibilities, George continues to serve on several not-for-profit/for profit Boards including chairing the Canadian Society of Association Executives (CSAE).

Mr. Weber has worked on major international relief operations and development projects for many years in Central America, Africa and South East Asia. He is trilingual - English, French and Spanish.

#### Academic Degrees & Professional Certifications:

B.Ed. - (P.E.) - McGill University, Montreal, Quebec Canada ; MA - McGill University, Montreal, Quebec Canada ; AMP - Harvard University Graduate School of Business Administration, Massachusetts United States ; CAE - Certified Association Executive.

## Jos J. Wintermans

### Former President & CEO - Sodisco-Howden Group

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Jos J. Wintermans is the former President and Chief Executive Officer of the Sodisco-Howden Group, where he restructured the company to perform better and become the leading distributor of Hardlines and Building Materials for Independent Merchants across Canada. The Company was acquired by CanWel Building Supplies at the end of 2004.

Before joining the company, Mr. Wintermans served for a period of 2 years as President and CEO of Skyjack Inc. a leader in the industrial platform manufacturing industry. After a significant restructuring and re-financing the firm was sold to Linamar Industries. For a period of one year as President & CEO of Rogers CableSystems Ltd, Canada's largest Cable Company, he restructured the organization and performance to cut losses significantly and restore confidence with customers, personnel and investors.

From 1988 to 1996, Mr. Wintermans served first as President, CEO & member of the board of Canadian Tire Acceptance Ltd, responsible for an array of financial services and then as Senior Vice-President, Diversified Business, Canadian Tire Corporation, reporting to the President & CEO. He introduced Requisite Organization concepts to the company and produced a highly motivated and successful company.

#### Academic Degrees & Professional Certifications:

MBA - Queen's University, Kingston, Ontario Canada ; Master of Law - Leyden University, Leyden, The Netherlands ; Honorary fellowship - Ryerson University, Toronto, Ontario Canada, 1993

## **Ken Wright**

### **President -Ken Wright and Associates Ltd.**

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Ken is an executive coach specializing in the areas of transition issues, developing organizational and team capability, managing high potentials and potential derailors. His experience comes from sales management, corporate recruiting and as VP of Marketing and Director of Management Development and Organization Effectiveness.

Ken combines assessment tests with his experience as a manager to coach executives to leverage their assets and minimize their blind spots. He supports teams in managing change and transition, new leadership, personality issues, problems of fit as well as retaining and developing high potential future managers. His clients include IBM, Honeywell, First Data Resources, Kelloggs, Mitsui, Robert Bosch Corporation, First National Bank, Merck and BJC Health Systems.

Ken has studied at the Centre for Creative Leadership.

Dr. Clayton Lafferty, CEO of Human Synergistics was his mentor in the use of 360 degree feedback and he is certified in the use of Level III Executive Self-Assessment. He studied the concepts of Requisite Organization and Executive Leadership under the aegis of Dr. Elliott Jaques.

Academic Degrees & Professional Certifications:

unavailable



## OUR PURPOSE

The Global Organization Design Society is a not-for-profit corporation registered in Ontario, Canada to promote the following objective:

The establishment and operation of a world-wide society of academics, business users and consultants interested in science-based management to improve organizational effectiveness for the purposes of:

Promoting among existing users increased awareness, understanding and skilled knowledge in applying concepts of Levels of Work Complexity, Levels of Human Capability, Accountability, and other concepts included in Requisite Organization and/or Stratified Systems Theory.

Promoting among potential users of the methods, appreciation of the variety of uses and benefits of science-based management, and access to resources.

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