

For the last several years, I have kept a small, framed photograph just within reach of my desk at home. On the left is my father, joyful, looking somewhere just off camera. I stand to the right, age thirteen, smiling up at him even though we are the same height. Both of us are wearing t-shirts that say “I Care.” The picture was taken at a senior citizens’ home, to which my father brought the staff of his company, Jay Medical, for an afternoon of learning and community service. They had just launched the Jay Care product, a cushion that relieved the distinctive posture and pressure problems faced by geriatric patients confined to wheelchairs. The “I Care” program helped engage the employees more deeply in the mission and real-world results of their efforts.

In a very tangible way, Jay Medical’s products made people’s lives better. But it was clear to me, even as a grade school student helping out in the factory, that “I Care” applied to more than just the company’s customers. I remember bringing clothes, toys, and school supplies to the families of factory workers during the holiday season. I remember a costly recall required not by legal responsibility but a sense of duty to our market. I remember working with the head engineer to reduce the waste and environmental impact of our research and development efforts. Of course, Jay Medical was not without its conflicts; with my father as president, my mother as vice president, and my brother as marketing director, I found many of the organization’s dilemmas erupting during my morning sleep and our family dinners. But there was a kind of organizational wholeness, a coherent purpose that survived and held these conflicts. This spirit generated and yet superseded the company’s commercial success as the predominant global player in the wheelchair seating market.

Eventually, however, the success of Jay Medical caused it to outgrow its early structures and leadership style. My father found himself increasingly distant from the excitement of product development, burdened with administrative duties. The dilemmas and conflicts that we had taken in stride as a family became more frequent, and grew in complexity and intensity. When a major player in the wheelchair market offered to buy Jay Medical, my parents took the offer, deciding to exit as managers and spin off a new startup in the hopes of recapturing the entrepreneurial spirit. Although the company’s sale brought my family a new prosperity, it also brought a certain fading of vitality. Since the acquisition, Jay Medical has not expanded beyond its original product line, stalling the innovation for which it had been known. My family’s spin-off business grew to a modest fruition and then sold to a competitor, but did not reach the same level of holistic caring or business success.

These early experiences have shaped my lifelong inquiry in to the nature of holistic success in organizations. What enables a company to not only succeed in the market but demonstrate a caring that extends to employees and broader environmental and societal stakeholders? When such companies reach the kind of developmental transition that Jay Medical did, what are the dynamics that sustain or destroy the spirit with which they were founded?

In the business literature, the kind of “wholeness” or holistic success that I attribute to Jay Medical’s early stage is often framed in terms of “sustainability” – the idea that if

companies devoted themselves to wider definitions of success and responsibility, we might develop a way of life that could be sustained without running into the future crises we all fear. MIT Sloan Professor John Sterman recently showed me an example of this discourse: “What do we really want? A manifesto for the organizations of the 21st century.”¹ The manifesto, drafted by an impressive group of Sloan faculty members, is bold and inspiring, highlighting the concrete possibility of greater social, environmental, and personal sustainability in organizational practice. The level of vision and commitment evident in the document is part of what drives me to pursue doctoral study at Sloan.

There is, however, a paradox in the notion of sustainability – that behaviors of individual companies may contribute to long term global health, but may not be sustainable internally. I had seen this in Jay Medical and in more visible companies like Ben & Jerry’s, where growth and acquisition changed the organizations’ sense of life and purpose. Thus, when I read the manifesto, it was with curiosity about the interaction and integration between the different kinds of sustainability as companies grow. What are the inherent conflicts in trying to maintain work-life integration, environmental and social responsibility, and profitability? How does transformation towards sustainability in one set of stakeholder relationships affect sustainability in the others? What are the underlying factors, whether in the leadership characteristics or the organizational structures and processes, that can sustain health in an organization’s entire system of stakeholder relationships? These are the questions I wish to pursue through doctoral study in Organization Studies.

In addition to my early experience with Jay Medical, my own work as an educator, entrepreneur, consultant, and scholar provides me with a unique perspective and ability to approach research in this domain. In particular I would identify three interwoven threads of inquiry that lead me directly into this work at Sloan.

The first thread focuses on the psychological underpinnings of holistic leadership in complex social systems. As an undergraduate at Harvard I majored in psychology and treaded the line between cognitive neuroscience and social psychology, studying the biological systems through which human beings make meaning in the world. From that foundation I worked in the field of early childhood education for several years, deepening my academic knowledge through practice. Driven by an interest in teachers’ professional development, I then returned to Harvard and studied with Robert Kegan, a renowned expert in adult developmental psychology. Kegan’s research focuses on the conflicts that people face when their meaning-making capacities are mismatched with the complexity of their social environments and organizations, a topic directly connected to the issue of personal sustainability. It was through Sloan Senior Lecturer Bill Isaacs’ guest appearance in Kegan’s class that I then found my way to Dialogos International, where I have gained further perspective on adult leadership development. By directly engaging

¹ Ancona, D., Bailyn, L., Brynjolfsson, E., Carroll, J., Kochan, T., Lessard, D., Malone, T., Orlikowski, W., Rockart, J., Morton, M.S., Senge, P., Sterman, J., & JoAnne Yates. (1999). What do we really want? A manifesto for the organizations of the 21st century. Discussion paper, MIT Initiative on Inventing the Organizations of the 21st century.

with clients through coaching, leadership training, and dialogic process consultation, Dialogos simultaneously studies and participates in people's growth. As facilitators of dialogue and team capacity building, we also look at the integration of individual capacities into collective intelligence and collective leadership. My work at Dialogos has helped me see some of the critical capacities that leaders can develop in order to achieve balanced success amid complex systems of stakeholders.

Looking ahead, I am eager to continue this thread of inquiry at Sloan, where Professor Ancona and Peter Senge's work on the Sloan Leadership Model provides a powerful organizing framework for further research on leadership development. How do capacities for visioning, sense-making, relating, and inventing develop as leaders grow? How might these skills help people lead organizational change towards integrative sustainability? Do organizations that demonstrate sustained, holistic success also demonstrate mastery of these four skills? If so, how do they balance among them and allocate them across their organizations?

The second thread of my inquiry focuses on systems dynamics, a discipline which bears directly on understanding complexity, sustainability, and wholeness in organizations. As an undergraduate, I dabbled in computer modeling of complex adaptive systems at Harvard, MIT, and the Santa Fe Institute, employing primarily agent-based techniques. It was not until a year after college, however, that I drew a causal loop diagram of my business and thereby stumbled upon the Sloan style of systems dynamics. At the time I was the president of an Internet startup in San Francisco called Little Engine, developing tools for parents and teachers of young children. In our presentations, I used a rudimentary model to highlight the erosion of quality in early childhood education and demonstrate how our product could intervene to reverse the cycle. Perhaps like many startups run by 22-year-olds in 2001, my company closed before we could capitalize on the idea or test my system model, but my interest was piqued and I began reading voraciously. Discovering Peter Senge's book The Fifth Discipline proved to be a watershed, as it integrated my interests in organizational learning and personal mastery with a far more robust discipline of systems dynamics than I had seen. My move back to Cambridge for graduate school was an intentional step closer to the source of that work. At Harvard I gained further exposure to techniques for mapping complex social systems in a leadership class at the Kennedy School of Government. Now, through my work at Dialogos, I employ systems dynamics modeling as a consultant to teams in global organizations like BP and the World Bank. The models we build relate to the dynamics of human interaction and communication, thus bridging the psychological, organizational, and systems disciplines.

In my doctoral studies and research, I would like to continue developing my understanding of systems dynamics and apply it to the challenge of integrative sustainability in organizations. Already, Sloan Professors Nelson Repenning and John Sterman have elegantly illustrated the challenging dynamics of organizational process improvement – the common addiction to “working harder” that subverts the ability to “work smarter.” Their research speaks directly to the challenges of *personal* sustainability in organizations. Extending the scope of this research, does the “work

harder” reinforcing loop also impact an organization’s attentiveness to environmental and social justice concerns? As an organization undergoes growth in the market and in its operations, how do these dynamics change? Approaching these questions of integrative sustainability through the lens of organizational systems dynamics could yield unique insight into the common challenges that well-meaning companies face.

The final thread of my experience has focused on the use of information technology to support collaboration among diverse stakeholder groups in organizations. Little Engine worked to integrate parents more fully into the practice of schools, using a web-based platform to deliver home activities that integrated with those in the classroom. After the company shut down I decided to gain more direct experience in schools, so I secured a teaching position in an innovative preschool in Boulder that emphasized a high level of parent and community involvement. From there, I chose Harvard’s Technology in Education program in order to learn a more robust intellectual approach to the challenge of stakeholder involvement through technology. In addition to my studies of adult development and leadership, I studied technology use in social context, steeping myself in theories of situated learning, collaborative knowledge building, and social structuration. I was able to immediately apply my new understanding in partnership with Dr. Catalina Laserna, first to developing a new program for teachers at the Extension School (the Certificate for Technologies of Education, or CTE), and then developing a program with the Pittsburgh Public Schools (Emerging Links/Digital Divide) as a consultant and researcher. Both of these programs use technology to help integrate university researchers, school district administrators, teachers, families, and community organizations in supporting educational equality and innovation.

Going forward, I would like to use my understanding of information technology in social practice to examine its role in integrative sustainability. How do healthy and caring companies use technology to support work/life integration? As organizations develop and grow, shifting the patterns of interaction among employees and other stakeholders, how do can they use technology to sustain a sense of community and purpose? I am particularly interested in engaging with Wanda Orlikowski as I develop this thread of inquiry. Her work on improvisational structuration is at the forefront of research on technology and organizational change; it also describes a specific, variable capacity for technological improvisation in context. What is the relationship between an organization’s mastery of that adaptive capacity and its ability to sustain stakeholder health and responsibility through developmental transition?

Weaving these three threads and perspectives, my thesis research at Sloan would closely examine an organization that operates holistically, successfully delivering value to multiple stakeholders, but that is in vulnerable transition – from startup to mature company, or in the middle of an acquisition or IPO. I would combine observational and interview methods with developmental assessment and systems modeling to understand the dynamics that support integrative, sustainable business practice through the company’s development. Ideally I would study a second organization in the same industry for comparison (or a second division within the same organization) that has been less successful in delivering social, environmental, and business value, but is striving to

operate more holistically as it grows. Through this work I would bring the notion of “organizational wholeness” or comprehensive sustainability into the light of more rigorous analysis.

This agenda clearly requires extensive research and inquiry, which I continue beyond doctoral study through a professorship at a research-oriented business school. My ultimate professional goal is to create an institute for the study and practice of sustainable organizational leadership, drawing together researchers, business leaders, and consulting practitioners from the field of organization studies and related disciplines. This is a dream I share with Sloan Lecturer Otto Scharmer, and my hope would be to collaborate with him and others on this vision during my doctoral study and beyond. Through the efforts of my career, I hope to fulfill the vision that I share so deeply with the Sloan faculty – successful 21st century organizations that sustain the spirit with which my father’s company was founded.