



Succeed with Inquiry:

Insights, Knowledge, Action

13th Annual Forum

InThinking Network June 18th - 22nd, 2014, Los Angeles, California, USA



Weekend Conference Schedule

Friday, June 20th

- 5:00 - 7:30pm Registration
- 6:00 - 7:30pm Dinner
- 7:30 - 8:45pm Opening Keynote – Bill Scherkenbach, *Breakthrough Inquiry*

Saturday, June 21st

- 7:00 - 8:00am Registration and Continental Breakfast
- 8:00 - 8:30am Welcome and Opening Remarks
- 8:30 - 9:45am Morning Keynote – Glenna Gerard, *Inquiry as a Portal for Collective Insight, Wisdom, and Innovation*
- 9:45 - 10:15am Break
- 10:15 - 11:30am Morning Parallel-Track Presentations
 - Ariane David, *What if Papa Changed His Glasses?*
 - Don McAlister, *Deming's System of Profound Knowledge in a Project Management Context*
 - Gipsie Ranney, *What World Are We In?*
 - Bill Bellows, *On Baseball, Bowling Balls, and Teamwork (An InThinking Primer)*
- 11:30 - 1:00pm Lunch, Including time for Thinking Together Sessions and Speaker Q&A
- 1:00 - 2:15pm Midday Keynote – John Carlisle, *Negotiation as Inquiry: Putting Legs on Deming's Points for Management 4 and 9*
- 2:15 - 2:30pm Transition Time
- 2:30 - 3:45pm Afternoon Parallel-Track Presentations
 - Glenna Gerard, *Inquiry Walkabout: A Portal for Insight, Knowledge, and Action*
 - Ravi Roy, *Inquiring Beautiful Minds*
 - Kennan Kellaris Salinero, *The Fragility of Knowledge: Science in a Time of Transition*
 - Bill Bellows, *On Baseball, Bowling Balls, and Teamwork (An InThinking Primer)*
- 3:45 - 4:00pm Transition Time
- 4:00 - 5:00pm In2:InThinking Networking Session, with Peter Stonefield
- 5:00 - 6:00pm No Host Happy Hour (pay bar)
- 6:00 - 7:15pm Dinner
- 7:15 - 7:30pm Transition Time
- 7:30 - 8:30pm Evening Collaborative – Lisa Tenorio, with Leslie Garman and David Ewart

Sunday, June 22nd

- 7:00 - 8:00am Continental Breakfast
- 8:00 - 8:15am Opening Together
- 8:15 - 9:30am Closing Keynote – Eric Feldman, *Rethinking Ethics: Compliance, Culture, and Managing Risk*
- 9:30 - 10:00am Break
- 10:00 - 11:30am Forum Café
- 11:30 - 12:00pm Leading Together

Our speakers are listed in this guide in presentation order



Bill Scherkenbach

Breakthrough Inquiry

Abstract: As Yogi Berra once said, “The future ain’t what it used to be.” It used to take generations for even one major change to occur. Now, many changes occur within just one life-time. The challenge is how to engage a group of people in this rapidly increasing tempo of change. Dr. Deming often said “Survival is not mandatory.” Change is often asymmetrical. The world changes and you must change or become obsolete. In this keynote, I will share a methodology I have developed that helps individuals change for the better and gives you the insight to help others improve as well: better questions, better skills, better spirit.

Biography: Executive career in operations and quality management spans world-class enterprises, multinational high-technology organizations and entrepreneurial ventures, with consistent success in improving quality while reducing cost. Dell, Lexmark, Tokai Rika, Samsung, Liteon Technologies, Austin Energy, Ford, GM, US Departments of Defense and Energy are a few of the organizations that have benefited from his technical and transformational leadership. Extensive European and Pacific Rim (China, Taiwan (Ex-Pat), Singapore, India, Malaysia, Korea, and Japan) supply chain experience.

Deming Medal, Engineering Society Gold Medal, ASA Fellow, ASQ Board of Directors (past); ASQ Automotive Division Chairman (past), American Insurance Congress Board of Directors (past), Author of 3 books on improvement of Quality in addition to the new Second Edition of “The Deming Route to Quality and Productivity”
Accompanied Deming on over 1000 occasions as he helped clients all over the world.

"He was my student, and there's none better in the world... It takes a little ingredient called profound knowledge, and he's got it." *W. Edwards Deming*



Glenna Gerard

(Keynote) Inquiry as a Portal for Collective Insight, Wisdom, and Innovation

Abstract: The power of inquiry as an entry point for new ways of perceiving, thinking, and engaging with the systems we inhabit and co-evolve is ageless. Practices that support fruitful inquiry are found in a wide diversity of spiritual, scientific, and cultural traditions. Whether we are asking the simple and elegant questions of an 'after action review' or standing at a major crossroads in a project at work or in our personal lives – inquiry is the key for opening the door to insight, wisdom and innovation. We will hear stories of how inquiry has changed our world. We'll learn about practices from different traditions for strengthening our inquiry 'muscles', both as individuals and in groups. We'll engage in an activity of collective inquiry around a question we generate. The aim: for you to leave with the feeling that you have stepped through a portal and are now standing in the same and yet somehow quite different place. And that you have a few more ways to invoke the power of inquiry to open portals in the next 36 hours of this conference and when you return to your organizations, families, communities.

Biography: Glenna Gerard is a gifted leader, consultant, facilitator, and experiential designer and guide, with 30+ years of working in diverse contexts. Her purpose is to foster awareness of wholeness within any and all systems – individual people, teams, organizations, communities. She has created and offers a diverse selection of frameworks and practices for expanding perspective and seeing clearly what is needed to make wise choices and take clear and necessary action.

In 2005, she created the first [Presence Walkabouts™](#), which she has evolved into a rich technology of reflective skills and practices to build individual and collective capacity for inner stillness, self-awareness, and the wisdom to take clear and necessary action.



Ariane David

What if Papa Changed His Glasses?

Abstract: Out of the millions of bits of information reaching your senses at any given moment, how does your brain choose what to perceive and what you remember. How does this "barely good enough" remembering determine what we think, how we think, and the decisions we make. disconfirming information. With Non-Positional Thinking, we lift ourselves above the lineup of positions and adopt the greatest possible perspective. From this vantage we can see that all positions, no matter how extreme or centrist, including our own, are deeply established mind-sets that must be examined and understood, both for the short and the long term. Ultimately we have to ask the life changing question, "What is it that I am NOT seeing, which if I saw would transform how I think about this issue or even about life itself?"

Biography: Ariane is a founding and managing partner of, and human systems development specialist with The Veritas Group, a consulting firm specializing in organizational development. She is a Senior Lecturer and member of the Executive College at California Lutheran University, and the Executive Director of the National University Center for Organizational Excellence. She has served as an advisor to numerous boards of directors and project based groups including the Senate Committee on Corporate Ethics.

Ariane's specialties include systems thinking, organizational learning, organizational change, culture development, conflict transformation, strategic thinking, and executive/management development. She holds a Ph.D. in Human and Organizational Systems and a B.S. in Physics. Her research and practical experience in the area of whistle-blowing has made her a recognized expert in this field. She is an acclaimed speaker and author.



Don McAlister

Deming's System of Profound Knowledge in a Project Management Context

Abstract: In my view, the traditional "Body of Knowledge" approach to the training and development of Project Managers, although strong on process mechanics and tools, does not provide adequate context for the assimilation and effective application of the knowledge. I believe that Deming's System of Profound Knowledge (SoPK) can assist in providing that context. In this presentation I will map the elements of SoPK to traditional Project Management thinking and also explore a few useful non-traditional ideas about Project Management that emerge from that activity."

Biography: Don is the owner of McAlister Consulting in Moorpark, California, providing aerospace technical and project management advisory services to private industry and US Government clients. He retired from Pratt & Whitney Rocketdyne in 2011, after 40 years working on the Engineering Design and Development, and Management of many liquid rocket engine Projects. Throughout his career, Don has also had an abiding interest in critical thinking and knowledge management processes and how they are used in our businesses and personal lives. Don and his wife Christine live in Moorpark CA. They have two grown children, and are the proud grandparents of 3 grandchildren. In addition to enjoying his family and consulting, Don is an active member of the Rotary Club of Moorpark, the President of the non-profit Simi Valley Jazz Club, an amateur jazz keyboard player, and writes an Internet blog at www.donmcalister.com. "



Gipsie Ranney

What World Are We In?

Abstract: In his book, *The New Economics*, W. Edwards Deming wrote, "Any theorem is true in its own world. But which world are we in? Which of several worlds makes contact with ours? That is the question." There are numerous situations in which context governs the bases for decision making or selection of practices to use. In other situations, there is choice available as to what context to create. Gipsie will discuss context for offshoring, outsourcing business activities, reduction of variation, use of numerical goals and targets, external and internal competition and cooperation, shareholder and stakeholder views of the firm, innovation, and improvement.

Biography: Gipsie Ranney is an international consultant to organizations on management, quality improvement and statistical methodology. She was a member of the faculty of the Department of Statistics at the University of Tennessee, Knoxville for fifteen years. She was a co-founder of the University of Tennessee's Institute for Productivity through Quality, and she developed and conducted numerous seminars on quality improvement. She served as Director of Statistical Methodology for General Motors Powertrain Group from 1988 to 1992. She was the first president of the W. Edwards Deming Institute. She co-authored *Beyond Total Quality Management: Toward the Emerging Paradigm*, published by McGraw-Hill, and contributed to *Competing Globally Through Customer Value*, published by Quorum. She has published papers on quality improvement and statistical methods. The American Society for Quality awarded her the Deming Medal for 1996, "for outstanding contribution in advancing the theory and practice of statistical thinking to the management of enterprises worldwide." Gipsie holds a B.S. in Mathematics from Duke University and a Ph.D. in Statistics from North Carolina State University.



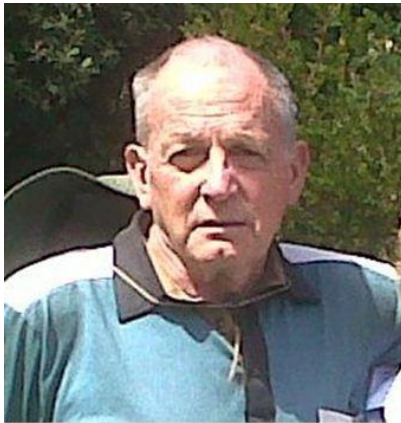
Bill Bellows

On Baseball, Bowling Balls, and Teamwork (An InThinking Primer)

Abstract: As with many success stories, the American pastime of baseball has many fathers (and mothers), with a heritage that extends well beyond the original thirteen colonies to England. Consider the design of the playing field, with “foul” lines emanating from “home plate,” to the left, past third base, all the way to the outfield fence, and to the right, past first base, to the right field fence. Nine defensive players are distributed around this diamond and across the outfield. What if baseball players were each constrained in their field positions by solid boundaries, painted on the field? Might this situation begin to approximate the operation of an organization with inflexible job descriptions, wherein employees are left to believe their respective roles are independent? Beginning with an exploration of baseball and bowling balls, this aim of this presentation is to share a proposal for “better thinking about thinking” as it applies to teamwork in all aspects of our lives.

Biography: Bill Bellows is an Associate Fellow in the InThinking Network at Aerojet Rocketdyne in Canoga Park, California, where he is known for his efforts to provide insights to the advantages of thinking together, learning together, and working together. Audiences for his classes have also reached after-school program in elementary schools, graduate students at Northwestern University, as well as corporate, university, and public classes across the United Kingdom. Bill earned his BS, MS, and Ph.D. in Mechanical Engineering from Rensselaer Polytechnic Institute in Troy, New York.

Away from work, Bill serves as president of the In2:InThinking Network, and as a board member of the W. Edwards Deming Institute, and also on the editorial board of the Lean Management Journal. He lives in Valencia with wife, Monica, and their two college-aged children, Allison and Wilson.



John Carlisle

Negotiation as Inquiry: Putting Legs on Deming's Points for Management 4 and 9

Abstract: An understanding of negotiation is, in my experience, more in need today at the top of organisations than ever before. Despite the absolute tried and tested commonsense of point 4 - minimise total cost, and point 9 - co-operate across corporate barriers to achieve win/win, there is a regression to unhealthy competition and the fear that comes with that. This applies to national governments as well as industry.

Having the competence to negotiate in this climate achieves two things: a much deeper understanding of what "win" looks like for the other party; and a strategy to build trust (which leads to innovation) by crafting agreements that work. I will share my experience of applying the soft and hard skills of this form of Inquiry, and the vital understanding of the system that underpins it.

Biography: John Carlisle's work has always been in the realm of Applied Research. His early work was researching the Zambian mining industry in the late 1960's to identify black school leavers who would replace the less educated white supervisors and managers. It was here in 1969 that he discovered the link between nutrition and intellectual performance, including innovative thinking.

John has contributed to three more books and delivered over twenty papers on collaborative project work across the world, discussing over 200 (mainly construction) projects and the vital importance of Dr. Deming's System of Profound Knowledge for project leaders – and advisers. He was awarded an honorary doctorate by Sheffield Hallam University for his work internationally on helping to deliver profitable cooperative projects, on time and on budget.



Glenna Gerard

(Parallel Track) Inquiry as a Portal for Collective Insight, Wisdom, and Innovation

Abstract: Experience a taste of the methodology of Presence Walkabout™, as framework for a different way of inquiring, in partnership with a Place - in this case, our conference setting. If the weather permits we will be outdoors, so dress comfortably. If the weather is uncooperative we will walkabout our indoor environment. I promise you an experience of a fun and sometimes downright awesome portal for insight, knowledge and action that you can adapt to use anytime, anywhere, as an individual and/or a group. Come with a question that is meaningful and important to you and perhaps even to our larger world.:-) Come with your 'little child mind' – curious, ready to explore new territories and see in new ways.

Biography: Glenna Gerard is a gifted leader, consultant, facilitator, and experiential designer and guide, with 30+ years of working in diverse contexts. Her purpose is to foster awareness of wholeness within any and all systems – individual people, teams, organizations, communities. She has created and offers a diverse selection of frameworks and practices for expanding perspective and seeing clearly what is needed to make wise choices and take clear and necessary action.

In 2005, she created the first Presence Walkabouts™, which she has evolved into a rich technology of reflective skills and practices to build individual and collective capacity for inner stillness, self-awareness, and the wisdom to take clear and necessary action.



Ravi Roy

Inquiring Beautiful Minds

Abstract: Building shared mental models and social capital among members and units within a given organization is the key to getting them to see themselves as parts of single whole. The fact that each part or process or unit may be related to one another in fact is not enough to bring about this realization. The essential question becomes how do we get distinct units or groups within an organization to share a common perception or vision and then work in their own respective capacities to achieve it?

We will begin with an exploration of Denzau and North's Shared Mental Models (SMM) conceptual framework to explore ways organizations can improve informal as well as formal processes and structures to facilitate shared learning and understanding. Effective collective action is most often the product of having strong levels of interpersonal trust among group members.

Biography: Ravi Roy holds a B.A. in political science from the University of California, Los Angeles (College of Honors); an M.A. in public policy from Claremont Graduate University in Claremont, California; and a Ph.D. in political science, also from Claremont Graduate University.

Ravi is also a research fellow at the Orfalea Center for Global and International Studies at the University of California, Santa Barbara. Prior to his CSUN appointment, he was director of the Master's Program in International Development in the School of Global Studies at RMIT University in Melbourne, Australia. In addition, Ravi has written or co-written three books and was the lead editor on a fourth, which focused on the role of ideas and mental models in shaping people's discrete understandings of the choices available to them and how these, in turn, inform their various policy preferences.



Kennan Kellaris Salinero

The Fragility of Knowledge: Science in a Time of Transition

Abstract: How we 'do' science in the United States, which is emulated in much of the rest of the world, is proving insufficient for the major challenges facing society: sustainable energy, sustainable food production practices, a healthy planet and a healthy population. The focus of production of knowledge through 'the scientific method' as currently embodied, is a culmination of a 2000 year history (the university structure), a 400 yr history.

The incremental additions to knowledge produced by the current pyramid structure of science, with extreme competition married to a kind of conservatism of thinking, will be insufficient to harness the growing demand for impactful work. This demand comes most strongly from the next generation of scientists, who are impatient and eager to address the largest issues facing humanity. What sort of changes, both in structure and in mindfulness, might be necessary to keep up with this demand?

Biography: Kennan is the 'initiator' for forming the Yámana Science and Technology tribe. She's a Ph.D. biochemist, and has worked at two national labs (both Los Alamos and Livermore National Labs), was on the faculty of the Chemistry Department at Georgetown University for a handful of years, and worked for Celera Genomics during the completion of the human genome project (a very rewarding experience).

In 2013, she was doing research in the field of genomics at Åbo Akademi in Finland. She has always juggled career and family, seldom elegantly.



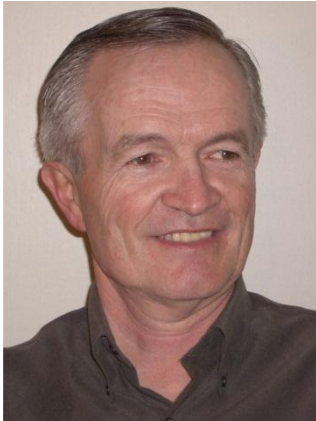
Bill Bellows

On Baseball, Bowling Balls, and Teamwork (An InThinking Primer)

Abstract: As with many success stories, the American pastime of baseball has many fathers (and mothers), with a heritage that extends well beyond the original thirteen colonies to England. Consider the design of the playing field, with “foul” lines emanating from “home plate,” to the left, past third base, all the way to the outfield fence, and to the right, past first base, to the right field fence. Nine defensive players are distributed around this diamond and across the outfield. What if baseball players were each constrained in their field positions by solid boundaries, painted on the field? Might this situation begin to approximate the operation of an organization with inflexible job descriptions, wherein employees are left to believe their respective roles are independent? Beginning with an exploration of baseball and bowling balls, this aim of this presentation is to share a proposal for “better thinking about thinking” as it applies to teamwork in all aspects of our lives.

Biography: Bill Bellows is an Associate Fellow in the InThinking Network at Aerojet Rocketdyne in Canoga Park, California, where he is known for his efforts to provide insights to the advantages of thinking together, learning together, and working together. Audiences for his classes have also reached after-school program in elementary schools, graduate students at Northwestern University, as well as corporate, university, and public classes across the United Kingdom. Bill earned his BS, MS, and Ph.D. in Mechanical Engineering from Rensselaer Polytechnic Institute in Troy, New York.

Away from work, Bill serves as president of the In2:InThinking Network, and as a board member of the W. Edwards Deming Institute, and also on the editorial board of the Lean Management Journal. He lives in Valencia with wife, Monica, and their two college-aged children, Allison and Wilson.



Peter Stonefield

Networking Session

Abstract: Beginning with our third Forum in 2004, we've dedicated formal time on Saturday afternoon to allow attendees to think and learn together in an exercise led by a past Forum presenter, on a topic of his or her choice. This year, we have invited Peter Stonefield to lead this session for the fourth time, this time with a focus on ***Experiencing ME and WE Stages of Consciousness***. *During this session, participants will pair up with multiple partners and gain awareness of the mindsets, needs /values of the ME or Achiever stage of ego development and the WE or Strategist stage of ego development. The awareness gained can enable participants to recognize the stage/mindset they and others are in enabling more effective interactions that accelerate the evolution of consciousness. Carl Jung puts it this way. "In the history of the collective as in the history of the individual, everything depends on the development of consciousness."*

Biography: Peter Stonefield, BSEE, MA, PhD. is President of Stonefield Learning Group, executive and technical staff coach, consultant and trainer. He was an electronic engineer, marketing and sales executive for the Bunker-Ramo Corporation before becoming a psychologist.

He taught graduate-level courses on Cognitive and Creative Process, Psychosynthesis and Counseling Psychology. He has successfully completed over 200 consulting engagements, created more than 20 different training and development programs and coached over 300 executives and engineers. His client list includes Apple Computer, Baxter Laboratories, Dow Chemical, Hewlett Packard, IBM, Intel, Stanford University, PPG, and Sun Microsystems



LISA TENORIO

Lisa Tenorio

Evening Collaborative, with special guests Leslie Garman and David Ewart

Biography: A native of Southern California, Lisa has been passionate about music since early childhood. It was also at a young age that she discovered an appreciation and joy for being a vocalist. As you might expect, Lisa trains in classical vocals as well as in musical theatre. At age 11, Lisa sang in the Nutcracker with the Hollywood Bowl Orchestra and the American Ballet Theatre of New York, at the Kodak Theatre in Hollywood. In 2002, Lisa was selected and presented the Female Vocalist of the Year Award with the Santa Clarita Children's Chorus. Lisa was a winner of the prestigious Omni Award for Best Classical Vocalist (under 16), and has returned to the Omni Awards presentation as a guest performer. Lisa was a winner on TV's America's Most Talented Kids. This was the first time a female classical vocalist has taken top honors at her age. Lisa sang the title vocals (Bernadette's Theme), a David Loeb original composition, for the multi-award winning documentary "Lourdes," (www.lourdesfilm.com). Lisa was a guest solo vocalist with the Santa Clarita Youth Symphony, and David Ewart, as they performed Villa-Lobo's Bachianas Brasileiras, a wonderful combination of vocals and strings.

Miss Tenorio is a graduate of Pepperdine University in Malibu, CA. She studied twice in Heidelberg, Germany where she and other vocalists performed in Germany, Austria, and Italy. Lisa continues to perform pieces in Latin, Italian, Spanish, English, French and German, including Lakme, Ave Maria, O mio babbino caro, Vittoria mio core, caro mio bien, Sabor a Mí, Wishing You Were Somehow Here Again, and many others. Lisa has also performed in numerous plays and musical repertoire including lead roles in Oliver, A Midsummer's Night Dream, and most recently performed the role of Adele in Johann Strauss Jr's Die Fledermaus where she earned a crowd pleasing standing ovation. Lisa's style and crisp coloratura soprano vocals will sure to mesmerize and captivate her audience.



Eric Feldman

Rethinking Ethics: Compliance, Culture, and Managing Risk

Abstract: Enforcement of corporate misconduct has never been more aggressive, resulting in the proliferation of corporate compliance departments throughout every industry. However, not all of these compliance efforts are effective at impacting employee behavior. Ethical decision making in a business setting is driven by the underlying corporate culture and core values of a company.

This presentation will identify how strong values-based ethics programs can create a "return-on-investment" by (1) limiting the financial and reputational losses of undiscovered frauds, (2) helping companies demonstrate ethical due diligence to government regulators by "walking the talk" and operationalizing their ethical commitments, and (3) mitigating the most punitive government fines and penalties through a commitment to remedial action.

Biography: Eric Feldman retired from the Central Intelligence Agency (CIA) in 2011 with over 32 years of experience in Inspector General oversight and federal auditing, in both the Executive and Legislative branches of government. He has served in executive positions with Offices of Inspector General at the Department of Defense, Defense Intelligence Agency, and CIA, and was the longest serving Inspector General of the National Reconnaissance Office (NRO) from 2003-2009. At the NRO, he presided over a highly successful procurement fraud prevention and detection program, widely recognized by the Department of Justice as a model throughout the federal government.

Mr. Feldman is a frequently sought-after speaker and author on the topics of procurement fraud detection and prevention, corporate business ethics and compliance, and managing an Inspector General function.