GENUINECONTACT™

a holistic approach for organizational success

Achieving and Regenerating Organizational Health and Balance

Foundational Module 2 of the Genuine Contact™ program

Workshop Leadership
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Content of Foundations Two

In this workshop, you will explore:

Workbook Overview

Section One: Diagnosis Using Simple Means and a Simple Framework

We present to you a few very simple to administer frameworks that we use when we determine the state of health and balance of the organization. In this section of the workshop, we introduce you to these frameworks in a way that invites you apply them to your own organization as well as providing you with the framework itself to use in the future. You will discover that diagnosing organization health and balance can be done simply and you will discover that in the very process of diagnosis, regenerating health and balance begins.

Section Two: Regeneration of Health and Balance

Regeneration of health and balance begins *during* diagnosis. The very same frameworks we use during diagnosis for health and balance are used as the map for the organization to use for regeneration of health and balance. In this section of the workshop, we take you through the map we use and explore with you how this can be used whether the organization chooses to work with a mentor in the process or do their own regeneration process.

Section Three: From Concern to Commitment

We invite you to determine what actions you will take following this workshop to improve and sustain health and balance.

Section One: Diagnosis

Who Should Participate in the Diagnosis?

There is no formula for who should participate in the diagnosis:

- It might be only the CEO or department head
- It might be the whole management team
- Or it might be a mixed group from the organization

In smaller organizations, the diagnosis can be done with everyone involved.

In larger organizations, the diagnosis can be done with every department separately if desired. This would require the generation of a composite document so that the different departments have the opportunity to view the data from all departments.

It can be very revealing to all concerned to use the recommended means of diagnosis in every level of the organization separately to determine if there are different viewpoints based on level in the organization.

Distribution of Information from the Diagnosis

It is essential to determine how information resulting from the diagnosis will be shared with those who have participated and those who are not participating. Again, the goal is to ensure that this is a life nurturing rather than life depleting process. Hidden or delayed information has a life depleting effect. What forums are needed for the sharing of information so that it can be understood and explored?

Timing

Rapid timing to complete all steps in the diagnosis and providing feedback is essential in using the diagnosis to simultaneously support regeneration. Remember that the very act of the diagnosis affects the organization. Diagnosis can be experienced as life depleting if the environment is already life depleting, no matter how much care you take with the diagnosis.

It is critical to minimize the life depleting impact of the diagnosis and shift the perception and experience of *experiencing the diagnosis as a life nurturing event*.

Critical elements to achieve this are:

1. Sharing of information as it is available rather than waiting until the end
2. Timing of information, process, involvement of everyone
3. Sharing the map of the process at the beginning
4. Simple to use and duplicable beneficial frameworks
5. Simple to use and duplicable beneficial processes
6. Final report within a few days of completion of the diagnosis available to all participants

Participative Processes

We offer a few simple frameworks for diagnosing the state of organizational health and balance. Remember that change is occurring *DURING* the diagnostic process. In our diagnosis, there is always also an interactive “whole systems” meeting to obtain the perspective of the “whole system” regarding achieving organizational excellence.

Within our worldview, we believe that participative processes are essential. We believe that the wisdom to diagnose and regenerate the organization is *within* the organization. We believe that external intervention should be kept to a minimum in both diagnosis and regeneration.

Please take a few minutes to reflect your worldview and how your worldview affects your approach to your work with diagnosis and regeneration of organizational health and balance. We offer three questions to you on the following pages to assist in your reflection.

What is your perception regarding positive and negative aspects of participative processes? How does your belief regarding participative processes affect your approach?

Do you believe that the wisdom to diagnose and regenerate the organization is within the organization? How does your belief about wisdom in the organization affect your approach?

Do you believe that external intervention should be kept to a minimum in both diagnosis and regeneration? How does your belief regarding external intervention affect your approach? Do you believe external intervention is useful at all or can the desired change be worked from the inside of the organization? If so, in your opinion, what needs to be in place?

Three Stages of Process for the Diagnosis

The process that we use to achieve the diagnosis involves three stages, all within rapid succession, preferably with no more than ten days from start to finish of the diagnosis. Stage one is optional. Stages two and three are mandatory.

- **The first stage** is one of conducting individual interviews to obtain one set of data that we will later use to compare with other sets of data. A key concern for us is to find congruence between data from individual interviews and data from group consultation. If there is a difference, why is this so? Below you will find the six questions we recommend in the one to one interviews. This stage of one-to-one interviews is only recommended if you are using an external consultant to help. This stage is not necessary for a successful diagnosis but simply a means to obtain more data.
- **The second stage** is one of holding a half day meeting (or meetings for different groupings of people), presenting each of the frameworks that we are going to present to you, in no particular order, and asking for feedback about the organization based on the framework. We record the data onto flip chart pages, so that the participants have a visual of the data as well as hearing the data as it gets presented. This stage is the essential one in the diagnosis process.
- **The third stage** is one of holding a full day meeting using a participatory process for representatives of the "whole system". Sometimes this means representatives from each level of stakeholders and sometimes it means that everyone involved with the organization from suppliers to customers attends.

Stage One: Individual Interviews

We interview 2-3 people from every level of the organization, from suppliers right through to customers. We ask the following questions and record the key comments in a way that does not identify who spoke the comments so that the comments can be immediately shared with all participants following the interviews. We categorize the comments into positive, negative, and suggestions as a way of quantifying qualitative data, thereby providing more information for consideration.

1. On a scale of 1-7, how would you rate the impact of this organization in fulfilling its purpose? One is low, seven is high.
2. Why did you rate it this way?
3. Do you have any suggestions?
4. Do you have any other comments?
5. What would be the best way to measure success in this organization? What would be measured and how?

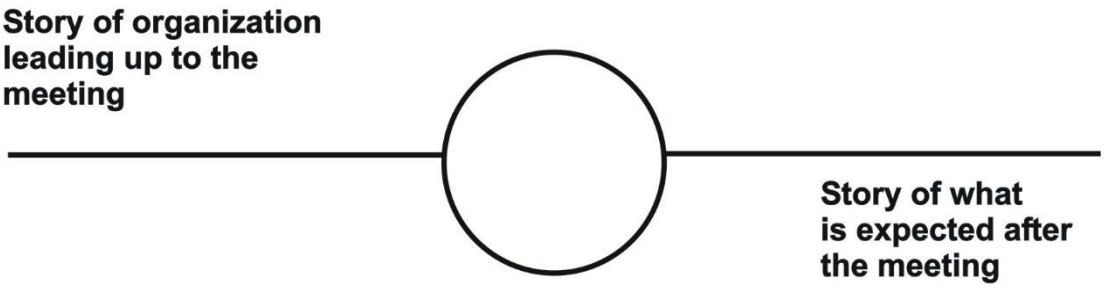
Stage Two: Using Simple Frameworks

Your own perspectives and beliefs will affect how you work with the frameworks and processes that we recommend. We will now take you through an exploration of the simple, duplicable frameworks that we use to achieve a diagnosis about health and balance that provides tools for regeneration as we go, as well as initiating the regenerative process as we go.

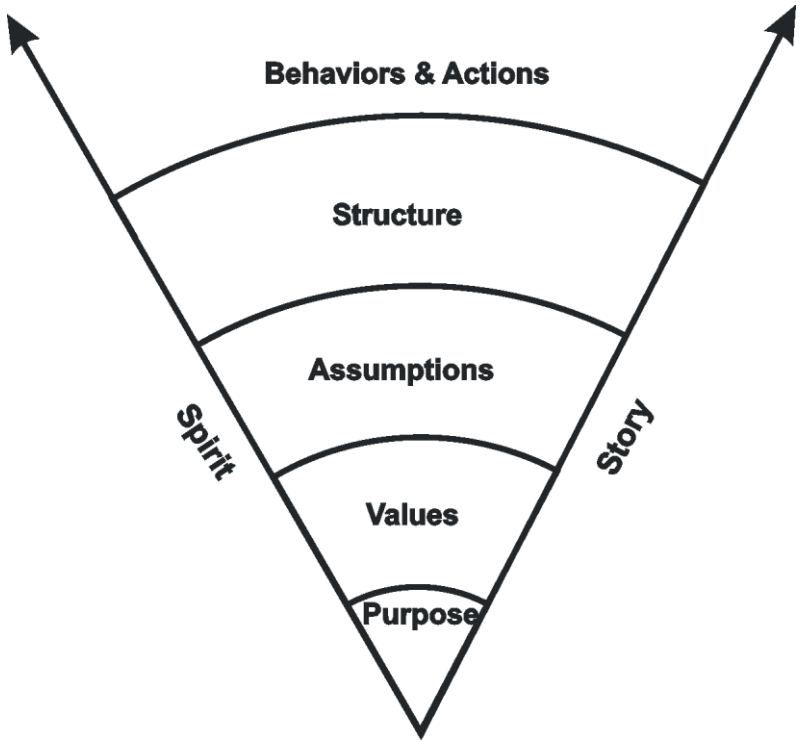
We work with either individuals or groups from the organization, exploring with them their perspective within each of these frameworks. Working together with the people of the organization, we are determining the state of the "interior terrain" of the organization. The information gathered is immediately in the consciousness of the people involved in the diagnosis as well as available to us for our report writing. A shift starts to happen as data gleaned through using each framework is in the consciousness of those from the organization who are participating.

1. Storyline
2. Deep Essence of the Organization
3. Cycle of Grieving and Healing
4. Organizational Lifecycle
5. Life Nurturing or Life Depleting Environment
6. Medicine Wheel/Healing Circle

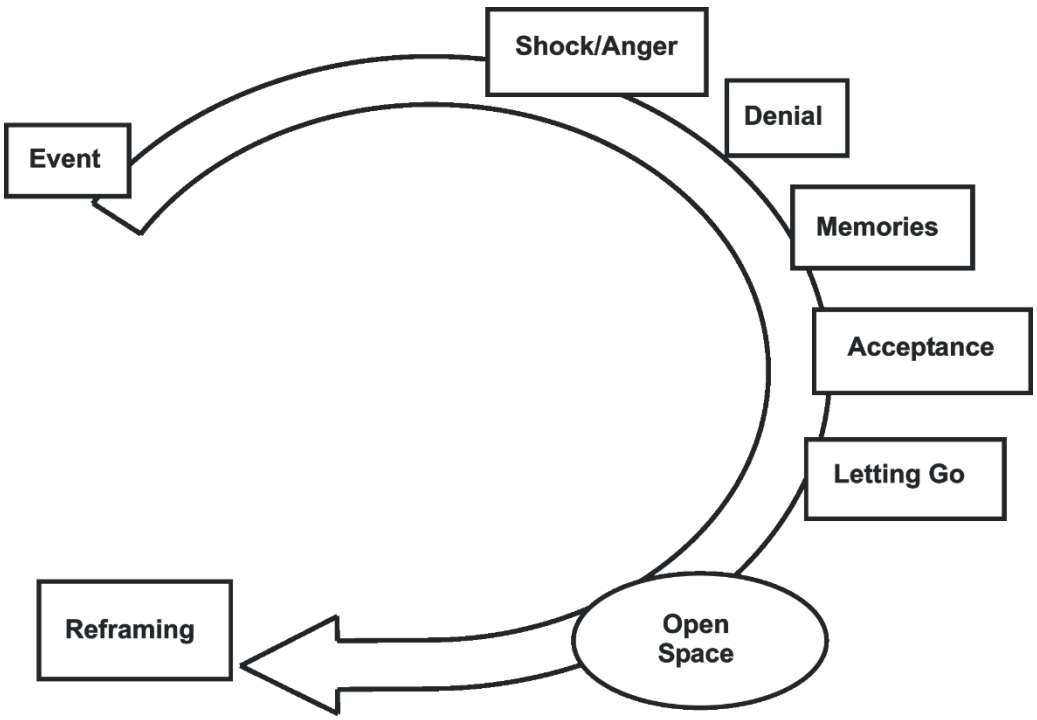
Storyline



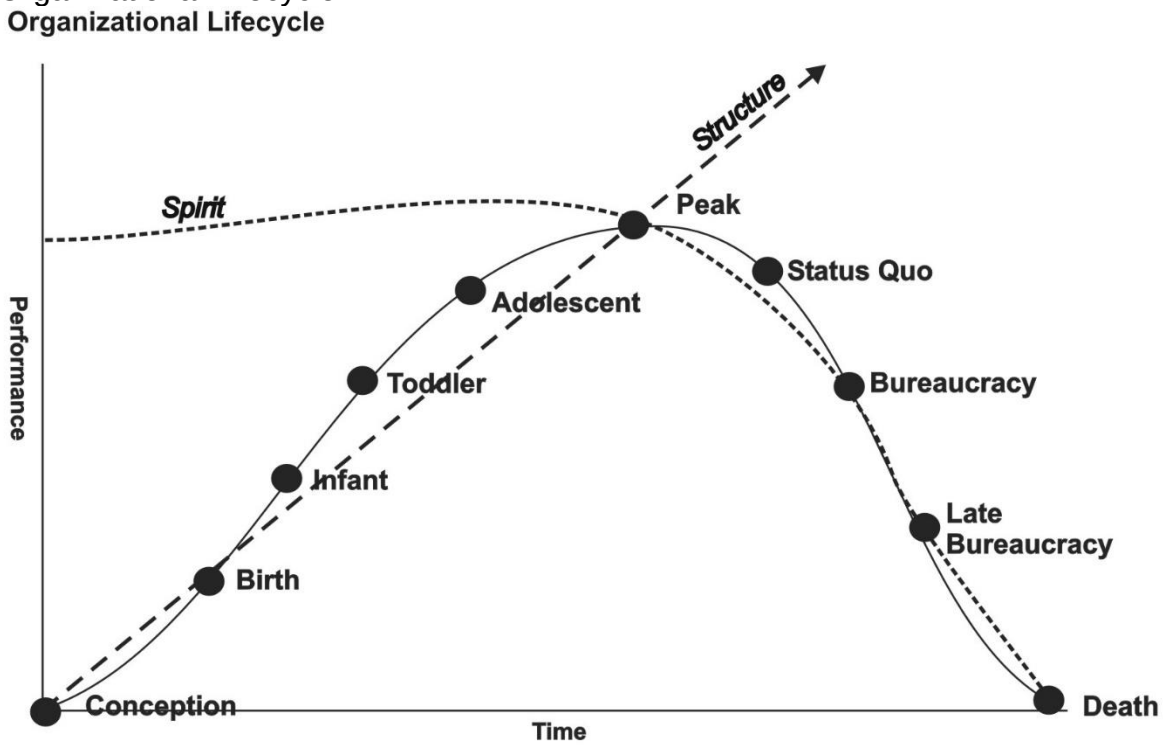
Deep Essence of the Organization



Cycle of Grieving and Healing



Organizational Lifecycle



Life Depleting Environment

These Kinds of Behaviors	Produce This kind of Climate	Resulting in These Kinds of Responses
Controlling		Conforming
Punishing		Representing
Regulating		Depending
Telling		Avoiding Initiative
Shaming	**Life Depleting**	Hiding/Depression
Guilt-Producing		Apathy
Judging		Deception
Rationalizing		Judging
Rewarding Inappropriately		Victim Behavior

People will react in the following ways and then some if they are in a life depleting environment: conforming but with anger or helplessness underneath, representing, depending, avoiding initiative, hiding of the true self and depression which is anger turned inwards, apathy and depression, deception. A life depleting environment is created by the following behaviors: controlling, punishing, regulating, telling, shaming, guilt producing, judging, being arbitrary, rewarding inappropriately. Simply put, people are not treated with the full respect of who they are and what they have to contribute.

Life Nurturing Environment

These Kinds of Behaviors	Produce This kind of Climate	Resulting in These Kinds of Responses
Listening Understanding Trusting Sharing Clarifying Rewarding Appropriately Focusing on process rather than outcome	**Life Nurturing**	Experimenting Creating Exposing Autonomy Participating Producing Effectiveness Efficiency

People will react in the following ways and then some if they are in a life-nurturing environment: experimenting, creating, exposing, working with autonomy, participating, and producing. A life nurturing environment is created by the following behaviors: listening, understanding, trusting, sharing, clarifying, and rewarding appropriately.

Medicine Wheel Tool©

Purpose
Is the purpose of the organization clear and clearly communicated and commonly understood?

Leadership
Is leadership leading? Is the CEO, division or department head, or Executive Director leading operations in accordance with Board of Directors leadership?
Are the following present?

- Risk of going to the unknown
- Courage
- Initiative
- Lead
- Inspire

In a non-profit organization is the Board leading through clear policies, values and vision?

Vision
Is the vision about what is on the horizon for the organization?
Is the vision about the future?
Is it clear and focused?
Is it inspiring?
Is it clearly articulated and understood?

Community
Does the organization work together with others in the community? Does the organization have the nutrient environment that enables good communication, high morale, and the purpose to be fulfilled?

Community enables the story to come alive, holds the space for creativity, imagination, innovation, solution focus.

Management
Is management managing? Is it providing the resources required, including systems, to get the job done? Is it removing barriers to getting the job done?

Relationships
Are expectations of one another clear? Is there a plan for coming together if things get out of sorts to work with them to get back into health and balance? Are relationships clear? For example, can a front line person go in to talk with the CEO?

Example of assessing relationships in a non-profit organization
Does the Board know its relationship to the Executive Director? Staff? Community? Funders and potential funders?

Does the Executive Director know his/her relationship to the Board? Staff? Community? Funders and potential funders?

Does the community know its relationship to the organization?

Does the staff know its relationship to the Board, Executive Director, Community?

The Circle
The circle represents wholeness

- Is there a sense of wholeness in the organization rather than fragmentation or silos?
- Do people experience the synergy of tapping into their collective wisdom?
- Are people being freed up to help one another when needed?

Integration of This Material for You

Our presentation to you of the steps for diagnosis is not yet complete, however, it is a good time to stop and reflect about using these frameworks for the second stage of the diagnosis before going on.

What resonates with you and why?

What surprises you?

What concerns you?

What questions do you have?

Stage Three: Whole System in the Room

The final step in our diagnosis is to bring the "whole system" into the room, using what is known as whole systems approaches, to access the wisdom of those within the organization regarding organizational health and balance. Our preferred whole system methodology is Open Space Technology. This methodology creates maximum opportunity for high participation, solutions, and "buy in" to the solutions as they are developed. Again, the diagnostic process in this step continues to be one of regeneration.

Data from this meeting is examined to determine if it is congruent with the data from the other components of the diagnosis.

Using another participative methodology for this stage of diagnosis will also work…but will not be quite as effective as OST in getting a true diagnosis.

We have found that the diagnostic information from the interviews and the information from the Open Space Technology meeting have been identical in 100% of the situations we have worked in. Thus, an accurate diagnosis can be done without the interview phase, relying on the Open Space Technology meeting for the input of individuals. However, some clients, for reassurance, still want the more traditional phase of interviews to take place and so we still do them from time to time, with curiosity about the similarity of results between the results of the interviews and the results of the Open Space Technology meeting.

Documentation

Data from the diagnosis needs to be pulled together into a final report. There should be no surprises for anyone of data in your final report because the information should have been shared as the process unfolded.

The only new information might be drawing conclusions regarding your comparisons of data from each phase and from each level/department especially if they are not congruent. It is not your job to conclude why there is a discrepancy in congruency, if any. It is best if the conclusions are developed by those in the organization. The report should be simple and easy to understand.

Your Plan for Diagnosis of Health and Balance in Your Organization

Please take some time to develop your plan to attend to the diagnosis of health and balance in your organization. Who should be involved? How and when will information be distributed? What will you do and what timing will you do this within?

Section Two: A Map for Regeneration

Sharing the Findings from the Diagnosis

In ideal cases, all participants in the organization participate in the diagnosis and in others, only a small group is involved. Ideally, all participants in the organization are provided with the findings of the diagnosis, including information about the process used and the frameworks used.

In some cases, these findings are shared with people in the organization who don't participate in the diagnosis. Ideally, the different working groups of the organization are provided with an opportunity to discuss their perspectives regarding the organization in relation to the story line, the organizational lifecycle, the grief cycle, and the medicine wheel. They are offered the opportunity to discuss the findings from the diagnosis within their own understanding of the diagnostic frameworks.

This increases awareness of the evolving organization, the importance of health and balance, and provides the opportunity for their involvement towards achieving greater health and balance. It also provides common frameworks for conversations to take place on an ongoing basis, providing the opportunity for appropriate regeneration along the way within smaller working groups that affect the whole.

The way that the findings are shared and the opportunities for discussion make an impact on the co-creation of a life nurturing opportunity rather than seeing the activities involved as life depleting.

Please take some time to devise a plan for your organization of how the findings would be shared and with whom. Will there be opportunity for discussion?

Revisiting Your Design for Diagnosis to Initiate Regeneration along the Way

The first step in regeneration is the diagnosis itself.

Review yesterday's material regarding the diagnosis. Work with the plan that you developed to do the diagnosis in your organization. Take the time to revisit the diagnosis and your plan for it to ensure that you are making the most of the diagnosis to initiate the regeneration. How would the diagnosis initiate the regeneration of health and balance?

One way to think this through is to examine every step of the diagnosis and how it is done and with whom by discerning whether it is being handled in a way that is life depleting or life nurturing. For those items that are life nurturing, how would you make the most of the opportunity they offer? For those items that are life depleting, what would you do to shift them to become life nurturing?

Using the Same Simple, Duplicable Frameworks to Assist in Regeneration

To assist the organization to achieve health and balance, the same frameworks are used in the activities for regeneration as were used in the diagnosis. This may or may not require an external consultant that we refer to as a mentor.

If the organization wants to attend to its own regeneration without mentoring assistance, we suggest to them to go back to the diagnostic frameworks and use them as a guide for their work. In using these frameworks, the organization will need to devise processes that work for it to assist with skill, competency, and capacity building for the regeneration and sustainability of organizational health and balance.

The following is written from the perspective of external help in mentoring the organization in the regeneration of health and balance.

Medicine Wheel/Healing Circle and Looking at Deeper Levels

Our primary tool is to use the framework of the Medicine Wheel as the *primary framework* to assist the organization to achieve balance and health.

When working with the Medicine Wheel for regeneration, the order of working with the components of the Medicine Wheel is important to achieve health and balance that is sustainable and renewable.

The second framework that we use simultaneously during regeneration is the Deep Essence. For us, it is a *supportive framework* to the work with the Medicine Wheel Tool. We use only these two frameworks in our group work regarding regeneration.

Medicine Wheel Tool

Responsibility for Purpose, Leadership Approach, Vision

Working on Purpose, Vision, Leadership

A decision needs to be made regarding who is to participate in developing the purpose, leadership approach, and the vision. These three are very much the work of the Board in a non-profit organization or the CEO in other businesses.

The Board or CEO usually consults with others in the organization to achieve this development. Often a day is required to explore each of these (three days total).

1. Establish a clear purpose for the organization. Why does it exist?
2. Establish an understanding of leadership. Boards or owners lead through setting the purpose, values, vision and governing policies for the organization. The senior staff person leads the operations of the organization through values and policies. Leadership leads into the unknown, moving the organization ahead to fulfill its purpose.
3. Establish clear vision of what is to be achieved in the future. This needs to be clear and focused.

During the discussions, work is done to explore beliefs, assumptions, and values. Key ingredients in each of these organizational components that need to be achieved for optimal performance include:

Purpose

- Clear statements that answer “what” is this organization? and “why” does this organization exist?
- Purpose must be commonly understood throughout the organization
- Purpose must be crafted in a way so that it is able to be measured so that the organization knows if it is or is not fulfilling its purpose

Leadership

- Leadership that will blaze trails and inspire others to follow
- Leadership that is passionate about the organization
- Leadership that will take risks and make difficult decisions
- Leadership through a leadership model that inspires people to follow and creates the conditions for the human beings involved to flourish
- Leadership by clear purpose, vision, values, strategy, and policies
- Principled, authentic leadership that incorporates qualities such as humility, inspiration, sincerity, passion, integrity, fidelity, decency, honesty, hope, and common sense
- Leadership that has confidence in and respect for its people and seeks their wisdom
- Leadership is a catalyst for change that is needed and is willing to lead with courageous conversations and the creation of opportunities for courageous conversations throughout the organization
- Leadership guides the development of strategies that direct the work of the organization to ensure that the value proposition of the organization is realized, that the organization is successful from the customer perspective,

from the operations perspective, and from the learning and growth perspective

Vision

- A clear, focused, future oriented and inspiring vision that is achievable, clearly defining the differentiating factors that separate the organization from other organizations that have the same purpose
- Within this inspiring vision to articulate a future oriented operating vision that leads the organization for a specific period of time from anywhere between three and seven years so that in fulfilling the operating vision, there is a shared sense of accomplishment and success
- The operating vision must be crafted in such a way that the organization can measure its success in achieving it

Working to Develop Community

4. Focus on developing community that is inspired by the purpose and vision and is willing to work toward fulfilling the purpose and vision. When community rallies behind purpose and vision, emotions are engaged. Engaged emotions are a key ingredient to great ideas.

A special meeting should be called to look at the issues and opportunities for achieving success with the purpose and vision. The meeting should involve everyone in the organization or a sampling of people from throughout the organization. We advise bringing together a critical mass of the people involved. Critical mass theories suggest a minimum of 10% of the organization is needed to affect change.

If the group is large, use a participative meeting methodology that has been designed for large group interventions. We recommend Open Space Technology. With a smaller group, Open Space Technology or Whole Person Process Facilitation is recommended (see information at www.genuinecontact.net). The key is to use a meeting methodology that enables maximum input and participation by those who attend. This requires a meeting methodology that fosters genuine contact. Any meeting format allowing discussions to remain superficial will not have lasting positive impact.

We have just described an initial meeting to develop community to move the purpose and vision forward. Developing community amongst the workers, management and anyone else involved in the organization can be done in a number of ways, but always keep in mind that the importance is not for the sake of community but for the sake of achieving the purpose and vision (evolving and constructive).

Community just happens when the purpose is one that people feel inspired by, leadership leads, vision is one that people feel inspired by and the evolving "terrain" is a life nurturing rather than life depleting one. Meetings that enable genuine contact and solutions from the collective genius of the organization are the means that we recommend as the catalyst to achieve and sustain organizational health and balance.

The genuine contact that gets fostered is genuine contact with the self, with another person, and with the collective. Behind that which is visible, this fosters genuine contact with recognizing that we are all connected.

Community

- Conditions created for people to thrive, to increase in skills, knowledge and capacity and to be in harmonious relationships.
- People in the organization offering their best, being fully alive, being passionate about fulfilling the purpose of the organization and achieving its vision
- Exceptional relationships with the external community including shareholders, partners, suppliers, customers, and allies
- Exceptional relationships amongst the internal community including leadership, management, line staff, and volunteers
- Good communication including courageous conversations, high morale, low turnover, low sickness, high productivity, and high creativity
- Optimal use made of whole systems methodologies that create the conditions for maximum participation

Form Follows Function

5. Now and only now is the time to work at the management aspect. Again, this work is done through meetings and is likely to take many days. A decision needs to be made regarding who is to be involved in these discussions and how decisions will be made regarding changes. A meeting methodology that fosters genuine contact, participation, and lots of input needs to be used. The meeting methodology should include sitting people in a circle with no tables between them. The following questions are helpful guides to the discussions that are needed.

What is required to develop a life nurturing rather than life depleting terrain?

What is the appropriate structure including systems and resources to provide the right nutrition to move the purpose forward so that the vision can be reached?

What needs to be done to remove barriers to getting the job done? What needs to be cleansed?

Management

In the Management portion of the medicine wheel, the following are developed:

- An organizational structure that liberates people to offer their best in terms of creativity, innovation, imagination, and productivity towards fulfilling the purpose of the organization and achieving its vision in accordance with its values and strategies

- Information systems that support the people in doing their best to achieve the purpose, vision and strategies of the organization. The systems are designed to serve the people rather than requiring the people to serve the systems.
- Human resource systems that support the people in doing their best to serve the purpose, vision and strategies of the organization. The systems are designed to serve the people rather than requiring the people to serve the systems.
- Provide resources so that the purpose, vision, and strategies can be achieved.
- Remove barriers so that the purpose, vision, and strategies can be achieved.
- Management is then carried out to ensure that the community involved can fulfill the purpose and achieve the vision. All management actions and decisions are guided by how the action or decision is moving the organization forward.
- Management makes the most of the tangible assets of the organization as well as the intangible assets of the organization. The intangible assets of the organization include human capital, information capital, organization capital, and collective intelligence.
- Management guides processes and does not manage people. When management creates the right conditions, people are self-managing.
- Decision making authority needs to be clear

And now is the stage for working on clarity of relationships

6. Appropriate structure will provide guidance for relationships. These now need to have clarity and agreement of what they are. Again, a meeting is required to achieve clarity regarding relationships. A determination needs to be made regarding who should be at this meeting and how long the meeting should be. Recommendations and decisions (if decisions are to be made at the meeting) might affect position descriptions.

Relationships
The cross in the medicine wheel represents ‘relationships’.

<u>Example: non-profits</u>

Are relationships clear? Does the Board know its relationship to the Executive Director? Staff? Community? Funders and potential funders?

Does the Executive Director know his/her relationship to the Board? Staff? Community? Funders and potential funders?

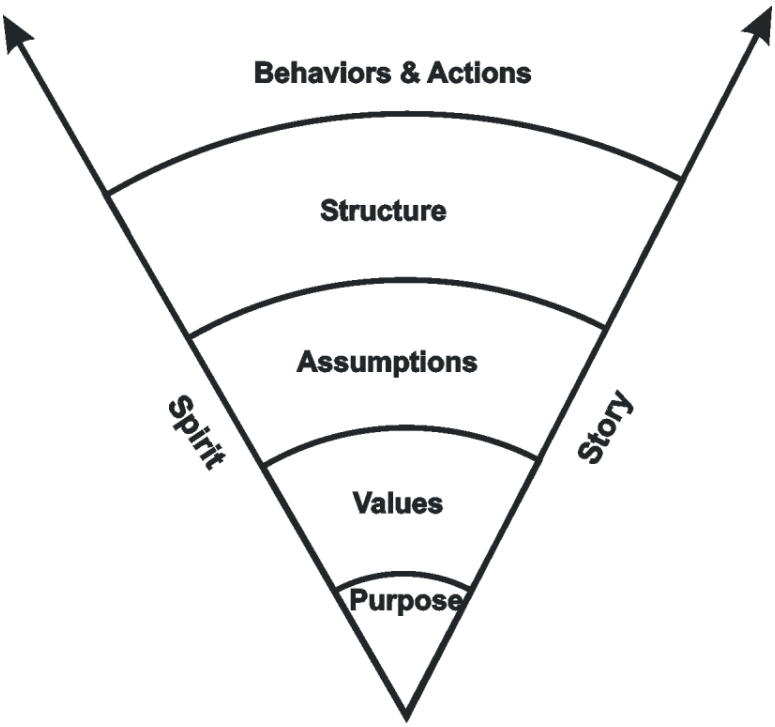
Does the community know its relationship to the organization?

Does the staff know its relationship to the Board, Executive Director, community?

Has someone taken on the role of toxic handler (see work of Peter Frost and Sandra Robinson) of the organization, creating the illusion that all is working, at a high personal price.

The Circle
The circle represents wholeness. The best way to regenerate wholeness with its accompanying experiences and benefit from synergy, collective wisdom, and genuine sharing, is to make frequent use of whole system meetings such as Open Space Technology, Whole Person Process Facilitation, World Café and Appreciative Inquiry.

Reviewing Through Looking at the Deep Essence Framework



It is useful to look at the deep essence framework as a guide in the background of working with the medicine wheel. It can inform your planning and thinking. You will see that attending to the purpose and the values is accomplished by working with the medicine wheel.

Working at the level of assumptions can be directly addressed in any of the exercises done, and assumptions are implicitly attended to in working with meeting methodologies that are highly participative.

When the work focuses on the management aspect, both structure and behavior/actions can be attended to. Where does working with story and spirit fit in and how would you work with these concepts?

Pause for a few minutes and make your own notes regarding your use of this framework to support your use of the medicine wheel to assist with regeneration of organizational health and balance.

Using All of the Frameworks from the Diagnosis to Assist in Ongoing Healing

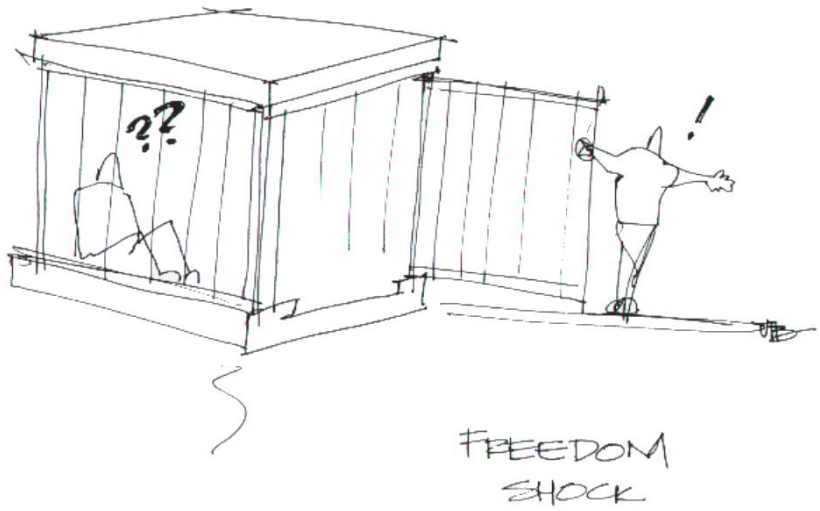
With the senior manager(s) we go over the ways that they might use the other frameworks presented in the diagnosis.

- Storyline
- Organizational Lifecycle
- Grief Cycle/Healing Cycle

And we go over with them ways to continue using the Medicine Wheel and the Deep Essence on an ongoing basis over the years to sustain and continue to regenerate health and balance.

The Work of Grief and “Freedom Shock”

When we remind them of the work of grief and that grief-work accompanies loss we remind them that change, including change for the better, involves loss. Working with all managers to understand that the work of grief is natural and so we encourage them to have conversations with their work teams regarding grief work assists in bringing about and sustaining health and balance.



Grief work also shows up as “freedom shock” or healing crisis work. Reaching a state of health and balance is difficult for many people. It is also wise to discuss healing crisis within the work teams. Using the human body as a metaphor is helpful in understanding what is happening as healing takes place in the organization. Using the human body as a metaphor also subtly encourages people to attend to personal health and balance, benefiting both themselves and the organization.

Regeneration of Health and Balance

We pause again for your reflections. Does what is presented here regarding regeneration make sense to you? Do you find this helpful? What are the highlights of this process for you?

Sustainable and Renewable Health and Balance

The diagnosis is complete. Regeneration of health and balance was successful. Spirit is high. Productivity is high. People enjoy coming to work.

We now attend to sustaining and renewing health and balance as a main task for management to attend to. What are your reflections regarding how sustainable and renewable health and balance would be achieved?

Having assisted with the diagnosis and the initial steps of achieving health and balance, what would you suggest to the organization to do in the future?

We offer the suggestion that no frameworks other than the simple ones we have been using are needed. Simple frameworks allow for the handling of complex matters. However, if you become aware of other frameworks that go deeply into the essence of the organization, feel free to experiment with using them as well.

Within the workshop design, we also gave many clues regarding work with health and balance. Can you think of some of them? What stands out for you to pay attention to?

We worked with what is visible and yet we always also attended to the invisible, knowing that 90% of communication takes place below the surface of what is visible. The teaching about the invisible is implicit throughout the diagnosis and the regeneration of organizational health and balance.

Throughout the entire workshop, a key teaching has been about the management of energy. This includes personal energy and the energy of the organization. Energy used in life depleting endeavors is destructive to the individual and to the organization. Energy used in life nurturing endeavors is constructive…creative… leading to personal and organizational evolution and growth. Our future depends on learning to manage our energy.

Section Three: From Concern to Commitment

Commitment

You have come to this workshop with your own work in mind. Based on all that you already had stored in your personal wisdom files, and what you have learned here, what commitments are you making now to achieve health and balance?

A question to ponder is your starting point. How does your WILL for health get invoked? How does the WILL for the health and balance of the organization get invoked?

We encourage you to take a few hours to reflect about your intentions of working to achieve health and balance in your organization. Make notes for yourself regarding how you will get acceptance for this work.

Make notes for yourself regarding your plans and why this feels important to you to pursue, if it does.

Writing your own intentions regarding this work is the next step in your commitment to achieving health and balance in your organization. You might also want to make some commitments regarding attention to your own health and balance.

Thank You

It is now time for our own closing circle. Thank you for participating in this learning journey. We ask that you complete an evaluation form before you leave.

And of course, we would be delighted to see you take the full Genuine Contact™ program. Training dates and locations are available on at www.genuinecontact.net.

And if you were pleased by this program, please pass word on to others. Thank you and journey well.

Credits and Acknowledgements

- This workshop was created by Birgitt Williams of Dalar International Consultancy. Birgitt and Ward Williams created the Genuine Contact™ program and approach and can be reached at www.dalarinternational.com.

- Open Space Technology was created by Harrison Owen and is described by Harrison Owen in his books published by Berrett-Koehler.

- Whole Person Process Facilitation was created by Birgitt Williams and Ward Williams of Dalar International Consultancy, Inc with a foundation in the work of Marge Denis of Stillpoint, Huntsville, Ontario, Canada in Process Facilitation.

- The manuals and other media for the Genuine Contact™ program were designed and produced by Rachel Bolton of Dalar International Consultancy in Kitchener, Ontario, Canada. She can be reached at rachel@dalarinternational.com.

- A comprehensive bibliography for the Genuine Contact™ program and a recommended reading list for this workshop is available by going to our list serve at www.genuinecontact.info.

Genuine Contact Quality Commitment

Pre-amble

Genuine Contact™ Professionals have adopted a holistic approach to leadership and organizational development based on the approach, program, and power of the Genuine Contact Program. They have developed competence in working with at least Whole Person Process Facilitation (Module 2) of the Genuine Contact Program to assist leaders and organizations in their development.

Genuine Contact Professionals, when working with modules of the Genuine Contact Program in their work as organizational consultants, leadership development consultants, and meeting facilitators, work within the scope of the modules that they have developed competency in. Genuine Contact Professionals may also apply different meeting methodologies like World Café, Appreciative Inquiry if they seem more suited to the business goal.

Depending on the needs of the client, a Genuine Contact Professional can pull larger teams together from amongst the Genuine Contact Professionals, and others whose work is in alignment with our quality commitment, when needed.

To ascertain if someone is a Genuine Contact Professional, a client can check with the Genuine Contact Program Director at gcprodir@gmail.com. While the Program Director cannot remark about the competence of the person, s/he can verify that a Quality Commitment has been made. Leaders and organizations seeking to engage a Genuine Contact Professional are responsible for selecting him/her and doing their own reference checks.

Genuine Contact Professionals make the following commitments to ensure the most beneficial results of their work and recommit to this Quality Commitment annually.

Quality Commitment

I assure the quality of my work with the following:

Meeting Facilitation

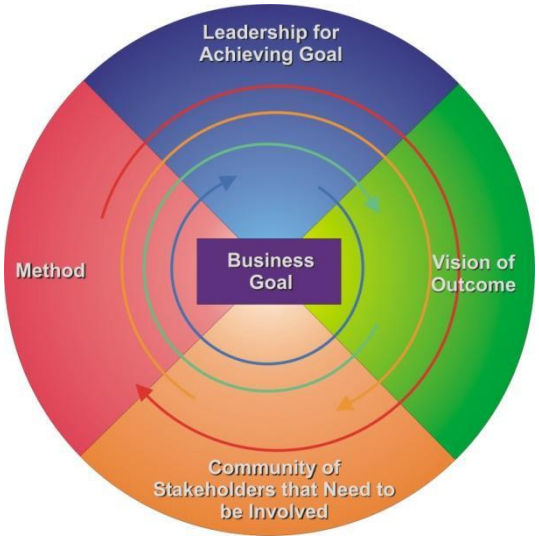
When working with the Genuine Contact™ approach to facilitate meetings, I follow an established protocol which includes preparation meetings, facilitation of the main meeting, facilitation of a debrief meeting, and ensuring a follow up accountability meeting whenever possible. I use Whole Person Process Facilitation as the participative and creative method for the preparation and debrief meetings and either Open Space Technology or Whole Person Process Facilitation or another participatory approach such as Future Search, World Café or Appreciative Inquiry (all credible participatory meeting methods) for facilitating the conference or main meeting.

Even when meeting methodologies are used that are not part of the Genuine Contact program, they will be conducted within the operating platform of a Whole Person Process Facilitation meeting, when possible.

Upon completion of the conference and/or meeting, I can provide my clients with an evaluation, based upon participant feedback upon request.

Longer Term Consulting Services for Personal Development, Leadership Development and/or Organizational Development

At the time of contracting, I and my client ensure that we have:



- clarity about the business goal of the assignment
- leadership considerations regarding success of the assignment in the organization
- expectations of the client (deliverables)
- who the people are who need to be involved for the assignment to be successful
- the design
- how the relationships will be worked out for success
- how the collective intelligence of the organization will be accessed if needed.

A schedule of review meetings will be established for course correction as needed in relation to the initial scope of the agreement. I understand the importance of continuous review and change rather than waiting until the final review.

Personal Competence, Capability, and Capacity Development

As Genuine Contact Professional, I commit to my ongoing personal competence, capability, and capacity development with:

- Ongoing participation in the Genuine Contact mailing lists (international & language-specific if available)
- International Genuine Contact Mentoring Circles (in person as well as in online environment)
- Regional and/or local Genuine Contact Mentoring Circles
- GC Newsletters / Blogs
- Participation in at least one Genuine Contact training annually, either through intensifying learning in a familiar module or taking additional modules, to be done in person, on-line, or by reviewing a GC training workbook.
- Any other engagement in Genuine Contact activities

Environmental Protection Policy

I use food, materials and techniques that ensure the least possible negative impact on the environment. This includes - whenever possible - but is not limited to recycled (flipchart) paper, water based markers, refill-products, organic food, snacks and drinks, energy saving technical products.

The Genuine Contact™ Program

Beliefs, Components, Key Concepts and Foundational Givens

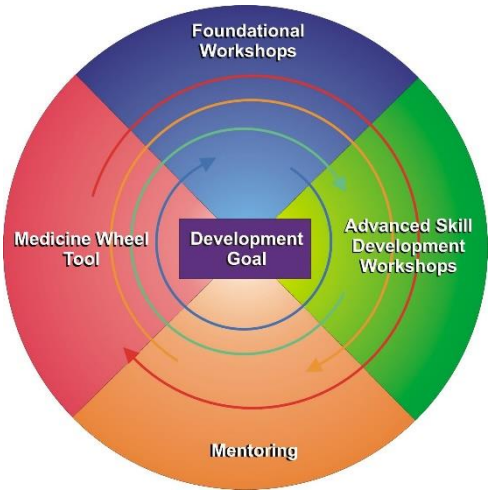
Birgitt and Ward Williams designed the Genuine Contact™ program with simplicity in mind. The program, focusing on attending to organizational health and balance as a foundation for organizational success, uses meetings as a catalyst for organizations to develop as conscious, life nurturing, interconnected creative organizations. Meetings are used as a catalyst. Management learns to manage differently. We call these organizations Genuine Contact Organizations. The process is organic so that every organization brings about its own unique change from within.

Beliefs of Genuine Contact

Within the Genuine Contact approach and program, we work from the following five foundational beliefs:

1. We believe that spirit or Spirit matters, that through spirit or Spirit, all of creation is connected, and that people are precious.
2. We believe that every organism (including the organization) has within it the blueprint for its own optimal health and balance.
3. We believe that focusing on genuine contact enables individuals and organizations to achieve the individual and organizational health and balance that is needed for optimal effectiveness. Positive change in the organization is directly linked to positive change in individuals. Both are required for sustainable new ways of working.
4. We believe in keeping it simple. Simple frameworks and processes enable success with complex situations. In keeping it simple, we recognize that any sustainable change must begin from the inside and cannot be externally initiated or driven.
5. We believe that change with its accompanying loss, grief work, and conflict is constant. Organizations that develop mastery in working with change can sustain optimal effectiveness. These leaders and organizations recognize that change cannot be managed, that energy spent trying to manage change is wasted energy, and that productive use of individual and organizational energy is achieved by working with change rather than against it.

Components of the Genuine Contact™ program



The Foundational Workshops and Advanced Skill Development Workshops make up the Genuine Contact program and approach. The series provides skill, capacity, and competency development in the Genuine Contact program as well as providing the conditions to assimilate the Genuine Contact approach.

1. Foundations 1: Path to Organizational Health and Balance offers leaders an opportunity to make the difference in the performance of your organization through the importance of balance, cleansing, and nourishing in a way similar to the holistic approach to the health of the human body.

2. Foundations 2: Achieving and Regenerating Organizational Health and Balance explores the state of health of organizations from a holistic organizational growth perspective and aids in developing your own prescription through a self administered diagnosis, towards achieving and maintaining a healthy organization in these rapidly changing times..

3. Foundations 3: Individual Health and Balance explores the state of individual health and how to maintain a state of optimal health even in highly stressful situations.

4. Foundations 4: Holistic Leadership Development develops the skills, capacity and knowledge for the new leadership paradigm ‘leading so that people will lead’ and to nourish a culture of leadership.

5. Advanced Skill Development 1: Working With Open Space Technology develops and enhances skills in facilitating meetings in which a frequency is held for people to make life nurturing choices from amongst agenda items within a particular theme and givens.

6. Advanced Skill Development 2: Whole Person Process Facilitation develops and enhances skills in facilitating meetings in which a frequency is held for people to make life nurturing choices based on what is presented to them to solve within a particular topic and within stated givens.

7. Advanced Skill Development 3: Cross Cultural Conflict Resolution develops and enhances skills to facilitate meetings in which people determine personal boundaries and view situations from flexible rather than fixed perspectives.

8. Advanced Skill Development 4: The Genuine Contact Organization develops and enhances skills in leading and mentoring conscious interconnected learning organizations. These organizations provide the conditions for choices to be life nurturing rather than life depleting.

9. Advanced Skill Development 5: Train the Trainer develops and enhances skills to teach others in all of the components of the Genuine Contact™ program, ensuring that the program maintains its integrity (wholeness) and respects the unique contributions that each individual makes to the program.

10. We offer Mentoring as a forum to learn the art of mentoring and to walk the talk of mentoring of both individuals and organizations.

11. We underpin the Genuine Contact™ program with the healing circle or medicine wheel as the overall matrix for our learning, healing, development, evolution and consciousness. As Medicine Wheel Tool© it assists us in walking the mystical path with practical feet and bringing about results that exceed expectations.

Key Concepts of working with Genuine Contact™

There are 9 key concepts supporting the foundational beliefs and development of the Genuine Contact Program:

1. Opportunities for genuine contact begin with the courage to be in genuine contact with the self and extend into all relationships.

2. Work of, with, from, and to Spirit can be experienced as a harmonic resonance that can be facilitated, beginning with establishing the harmonic resonance within the self as the facilitator. This requires discipline in a state of BEING in this harmonic resonance as the key work for the facilitator. In doing so, we work with healing energy, drawing from knowledge in the healing arts.

3. We work with the blueprint for health in the organism (the individual and/or the organization) by attending to balance, cleansing, and nourishing.

4. Change is constant and organizations must be developed to thrive in change.Organizational effectiveness in motion is a required organizational capability if they wish to thrive in future times of intense change.

5. We use meetings as a catalyst to assisting the organization attain a state of health and balance. The two meeting methodologies used are Open Space Technology developed by Harrison Owen, USA and Whole Person Process Facilitation developed by Birgitt, USA. Both meeting methodologies are highly participative, within a boundary established by predetermined “givens".

   Within Open Space Technology, a harmonic frequency is held for people to make life nurturing choices from amongst agenda items within a particular theme and givens.

   Whole Person Process Facilitation was developed by Birgitt Williams to complement working with Open Space Technology as a meeting methodology equally as participative, with similar values, and yet serving the organization when a process as open as Open Space Technology is not appropriate to the agenda and circumstance.

   Within Whole Person Process Facilitation, a harmonic frequency is held for people to make life nurturing choices based on what is presented to them to solve within a particular topic and within stated givens. The topics are predetermined, thereby offering a more obviously structured agenda than Open Space Technology.

6. We believe that a liberating structure, combined with a participatory architecture is essential to achieve and sustain organizational health and balance so that organizations are highly effective and able to thrive in constant change.

7. We work with Open Space Technology and Whole Person Process Facilitation as interventions that enable health and balance in the ongoing life of the organization. We recognize these meeting processes as powerful and impactful in the ongoing life of the

organization, therefore we attend carefully to both the pre-work (before a meeting) and the debrief work (after the meeting).

8. We recognize that everyone facilitating and leading using the Genuine Contact™ program will do so with their own unique style and experience. However, it is also necessary to guarantee to organizations who bring this program into the organization that they are receiving consistency with the component parts and/or their development as a genuine contact organization. Clients are entitled to assurance that when they engage in any components of the Genuine Contact™ program, that it maintains integrity. Within the Genuine Contact™ program, the components are standardized and can be easily duplicated. When any of the components are offered in an organization, the client is guaranteed of a certain standard.

9. Component parts of the program have value if taken on their own.

Foundational Givens of the Genuine Contact™ program

Birgitt and Ward Williams established minimal Foundational Givens for the Genuine Contact™ program. Foundational Givens define the approach and are not open for change. Basically, Foundational Givens are keys in defining what the program is and what it is not. On September 21st, 2001 Birgitt and Ward Williams invited the first group of graduating GC Trainers and all graduating GC Trainers in subsequent years, to participate in a Genuine Contact Organization within the theme of developing the approach within the following five Foundational Givens listed below.

In 2006 the GC Co-Owners Group Ltd. was formed and additional Operating Givens of the GC Co-Owners Group Ltd. have been developed over time and are open for review and change by all members of the organization. The Operating Givens are available in the Co-Owners Space online (ask Program Director for access). Foundational givens are not open for change.

Foundational Givens:

1. The 5 foundational beliefs as noted above.

2. There are 11 components of the Genuine Contact™ program as noted above.

3. Requirement to provide the Workbooks developed by Birgitt and Ward Williams when a GC Training is offered.

4. Limited givens, maximum choice and participation.

5. Limited external consultant involvement with maximum skill and capacity building.

The overall goal is to have the Genuine Contact™ approach and program make a life nurturing difference in the world.