THE GENUINE CONTACT™ WAY OF WORKING

Rapid High-Participation Strategic Planning[1]

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What do you do if you've been riding the waves of a big government contract and the rules change? If you are leading a large non-profit with shaky financial underpinnings, you get busy and shape the future before it shapes you.

We were invited to bid on a strategic planning process for "GWA" (not the actual name of the firm) that had all the markings of a nightmare project: the whole project would need to be completed within two and a half months and involve the workforce, key external stakeholders and a geographically dispersed Board; the organization runs on a 24-hour-a-day schedule; and some of the leadership team was already convinced that starting a for-profit entity was the answer.

The project mandate led us to create a multi-layered approach that incorporated and blended applications of Appreciative Inquiry (AI), Open Space Technology (OST), Whole Person Process Facilitation™ (WPPF), a benchmark study, and a technology-based version of Open Space Technology called OpenSpace-Online® Real Time Conferencing software. We

[1] A Case Study Summary condensed version originally published in Nov 2004 AI Journal

completed the project within the given timeframe and created a number of positive impacts in the wake of this planning "speedboat."

Client and Project Background

GWA was founded in the early 20th century as one of many socially oriented organizations of the period dedicated to eliminating undesirable social conditions. Today, GWA's annual operating budget is approximately $12 million. Its more than 250 employees provide daily services to thousands of individuals in the United States, Puerto Rico, and the U.S. Virgin Islands.

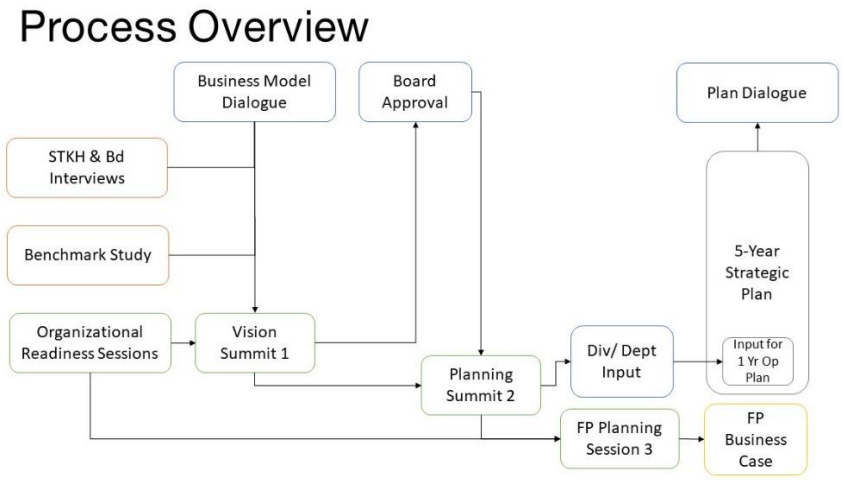
GWA faced several significant challenges. GWA's mission and identity had become conflicted. The majority of its revenue in the last 18 years had focused the organization on a service that it was providing through a contract for a government agency. This major contract was scheduled to end, and a potential new contract would include requirements that would fundamentally change some of GWA's core competencies. Secondly, with privatization of so many public services, GWA's ability to continue funding its central mission was in jeopardy. The new Board Chairman and GWA's CEO both had a clear challenge ahead.

Thus, the goals for the strategic planning process were to:

- Build a five-year strategic plan for GWA;
- Create a business case within the context of the overall strategic plan that would inform GWA's decision about whether to launch a for-profit business venture; and
- Provide input from the five-year plan for GWA's one-year operating plan for Fiscal Year 2005.

Phase 1: Preparation (Definition and Discovery)

The first step was our own preparation for working as a team. Debbie Morris served as lead consultant and project manager, to interface between the organization and the consulting team, provide resources, remove barriers, and knit the parallel activities together in a common framework.



The second step was to establish the goals, schedule, and planning parameters or "The Givens" with the management team. The Givens spell out the perceived non-negotiables, to be provided to all participants in the planning events. The 'givens', by definition are not intended to inhibit discussion about whatever the participants want to discuss, but rather to manage expectations regarding what is likely to be enacted after the meetings, and to ensure that the process would not send people "out of bounds." Consultant Birgitt Williams had previously created the concept of establishing the 'givens' as a critical success factor for ensuring long-term benefit to organizations using OST.

Examples of "The Givens"

- Current bylaws are open to change.
- Board structure is open to change, with enough data and a clear rationale.
- The Board as a governance structure is a given.
- Current mission statement is a given.
- The vision is open. We can go beyond the current service categories.

Next was a meeting with the GWA design team. In one intense day, the team built a shared vision of the whole process, named the process, created a graphic, developed key messages for the invitations for each event, and developed project plans for each event. The design team also identified the communities within GWA that should be represented in the planning events, as the need for staffing the phones 24 hours a day prohibited 100% attendance at any one event.

A concurrent activity in the Preparation phase was to inquire into new ideas and approaches from outside the organization. Consultants Sallie Lee and Debbie Morris developed appreciative inquiry protocols, conducted the interviews and documented the results. Although it would have been preferable to have GWA staff conduct the interviews, this was not possible with the time constraints and existing demands on them. We concluded that it would be preferable to have the stakeholder voices present in SOME way rather than not at all. The interviews identified trends, opportunities, GWA assets, capabilities and core competencies. Verbatim summaries of the interviews were included as inputs to the Vision Summit, with no attribution as to the source, other than either "Stakeholder" or "Board Member."

WPPF is a means of facilitating meetings that taps into the whole person – their intellectual and intuitive wisdom – and creates maximum choice for participants while simultaneously offering a guided facilitation approach. It uses the same principles and laws as an OST meeting as well as on the Four Immutable Laws of Spirit developed by Angeles Arrien. For more, see genuinecontact.net.

Six organizational readiness meetings were held during this phase, to prepare everyone to be part of the planning process. Even though we faced severe time restraints, we were intrigued with team member Birgitt Williams' experience that whole systems meetings about the future (such as OST) work best if there is first an opportunity for the organization to honor all the stories of the past and present that need to be told. The telling of these 'mad, sad, or glad' stories moves people forward through the grief cycle – completing unfinished business -- so that more energy is available to engage fully in planning for the future. This step is often as important as the whole systems meeting itself

for positioning the organization for creation and implementation of the strategic plan. The organizational readiness meetings were conducted using WPPF.

After open sharing, the comments participants wished to record were gathered into a document used as an input to the Vision Summit. This meeting was also an opportunity for the consultants to share the consulting design with the whole organization, inviting them into the process.

Phase 2: Mission Reaffirmation and Vision Development (Discovery and Dream)

A one-day vision summit facilitated by Sallie Lee and Debbie Morris used Appreciative Inquiry to consider trends and inputs from stakeholders and the Board, discover GWA's moments of greatness and strengths and build a vision statement. [See interview guide]. The sixty participants in the Vision Summit represented employees from all parts and levels of GWA as well as the Board chairman. After debriefing the similarities and differences, pictorial visions were translated into a new GWA vision statement. Seeing the intensity of commitment to GWA's storied past and promising future was a defining moment, especially for the new Board chairman and GWA CEO.

Through a pre-planned conference call, the Executive Committee of the Board reviewed the Vision Statement and gave approval for further planning to be based on the new Vision Statement.

Phase 3: Strategic Plan Development (Design)

The next week Birgitt and Ward Williams facilitated a planning summit using Open Space Technology. Approximately sixty participants, again drawn from every level, department and the Board, developed the agenda for Day 1, led the breakout groups, and documented their thinking in a set of proceedings. On the second day, the participants prioritized seven strategic directions that would move GWA toward their vision and met again to determine goals and objectives for each strategic direction. By the end of this summit, participants had crafted GWA's strategic plan, collectively agreed on GWA's goals, determined responsibility for each, and identified the necessary tactical actions and resources. After the OST meeting, these were refined by the appropriate existing work teams to build detailed plans through 2009.

Phase 4: For-Profit Business Case Development (Discovery and Dream)

Two team members, Birgitt and Ward Williams, led the executive team through a day-long alignment process to begin this concurrent phase. They used WPPF™ to ensure that the meeting was done in a way that would be congruent with the assumptions and practices of AI and OST, so as to avoid the cognitive dissonance that can occur when consultants use a

blended approach to a multi-event process. In addition to the explicit goals [see insert] the team achieved a level of conversation and alignment that had been missing from their earlier discussions of the topic.

Next, GWA staff, with support and guidance from consulting team member Stephen Garcia, conducted a benchmark study consisting of one-hour interviews with eight other non-profits that had successfully launched for-profit business ventures. We felt it was critical that GWA leaders turn their focus outward and learn for themselves about the challenges and opportunities of social entrepreneurship.

The benchmark study was then included as an input to a subsequent Virtual Open Space Technology meeting focused specifically on consideration of a for-profit business venture. The Internet-based meeting was conducted with approximately 40 people from across GWA using online meeting software. We thought this would be an interesting and practical way to have one further conversation without the expense of a face-to-face meeting and chose this software because its structure would be cognitively congruent to the previous AI, OST, and WPPF™ experiences. The full transcript was captured and will be advantageous to GWA staff as further planning for a business venture continues.

Outcomes

Seven strategic directions – overarching areas of focus – along with goals and objectives proposed over a five-year period emerged in the planning summit, with an eighth added during the post-summit planning period. After presenting the plan to the Board of Directors, the executive team began implementation planning and found it useful to prioritize and map their implementation framework for the strategic plan. Using Kaplan and Norton's strategy map process as a foundation, Debbie Morris helped them align and map the objectives, activities and measures, after which the Board, executive team and department heads knew exactly how to go forward with what the whole system had conjured. GWA's identity, focus and a path forward were newly alive.

There will be long term results from this blended approach. Yet we already know that the management team became aligned with each other and employees; employees who participated in the process report increased work motivation, significant personal learning, greater employee satisfaction, delight in the process, increased clarity regarding GWA's mission and goals, and surprise at the amount of work completed in such a short period of time.

One comment shared at the end of the planning summit said it best: "We each came here as an individual to have our say, representing our own views and secondly the perspective of the part of the organization we work in. At the end of the day, we were all thinking about the good of GWA as a whole." Many were astonished at how others from across the organization saw the same problems and opportunities, and how each part of GWA seems to be looking into the future together. Senior staff remarked how several strategic directions emerged in a stronger way than they might have set out on their own. The passion and dedication of employees was visible to all, and the Board members who were able to participate found it be a valuable immersion into GWA's inner workings.

Our Reflections

As we completed our work, we reflected with surprise on how seamlessly these approaches blended together. We believe it is because they each shared a common set of assumptions and principles: the value of wholeness, of incorporating all voices, and of changing the inner dialogue of the organization with fresh thinking and powerful, democratic conversation forums.

We also needed to be flexible as a team. One of our strengths was a willingness to see what was really needed and set aside some of our purity of practice while keeping the essence whole. For example, in AI we don't normally focus on sad and mad stories, only the "glads." But we could see the value of achieving organizational readiness for the other whole systems processes to be most effective. Along the way, we surprised even ourselves at the speed with which we were able to engage, involve, and innovate with grace and ease, in true partnership with our client system.