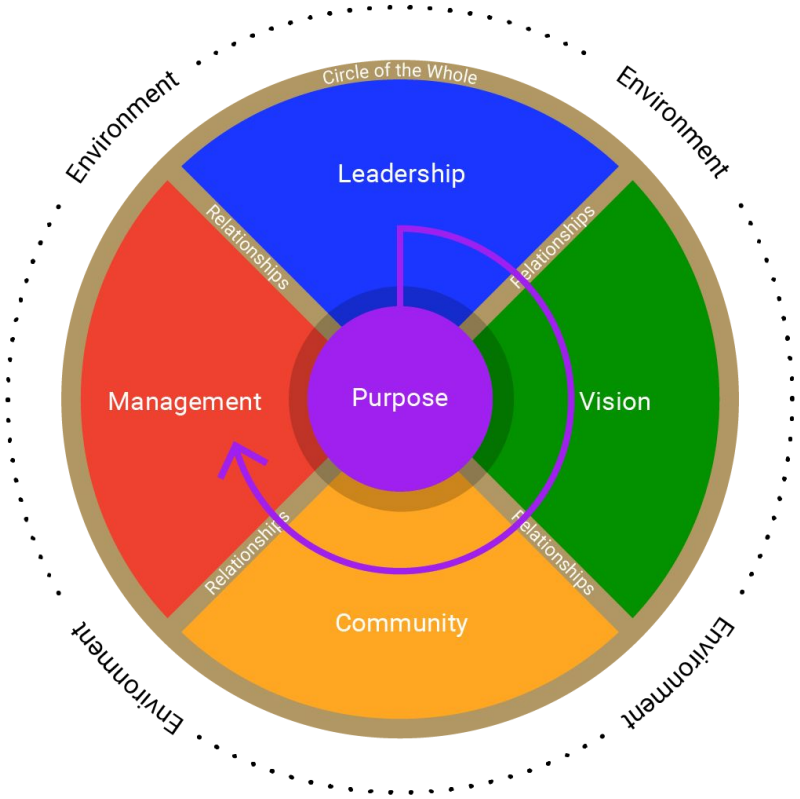
GCO Case Study
Operating Matrix
including strategic approaches and strategy map

(this operating matrix sample was created during Summer Academy 2023 as a case study exercise)

Operating Matrix Work for GCO Case Study



Framework used to create Operating Matrix is the Medicine Wheel Tool©
of the Genuine Contact™ Program

Why use an Operating Matrix?

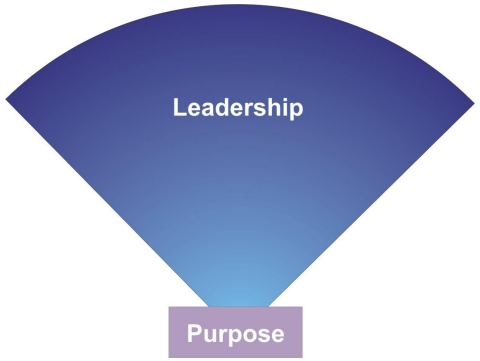
The development and evolutionary path of a complex organic system can be greatly assisted by using this operating matrix document as a living source document, with updates based on development, monitoring and adjustment over time.

- Exists to anchor individual, team, and organizational decisions and actions to the chosen purpose, vision, values and strategies
- Provides important linkages between strategies and operational planning
- Provides a comprehensive, logically laid out organizational development plan as an important platform in priority setting, decision making and performance management
- Provides a clear picture of organizational development for staff orientation

Purpose

Working together to expand the capacity of the organization and its members to spread Genuine Contact in the world.

Leadership Approach

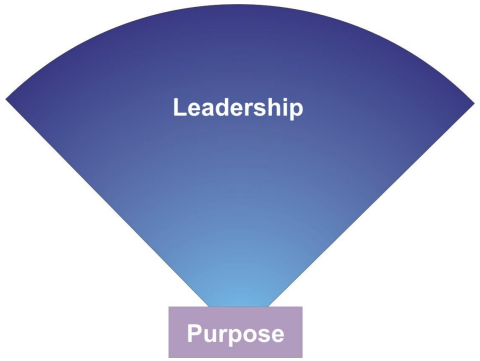


Members of the Genuine Contact organization take leadership to bring in ideas and take action that contributes to the organization fulfilling its purpose.

We commit to lead together. In this spirit, we create space for work based on shared leadership in the International Genuine Contact Organization.

Leadership is underpinned by the 5 Beliefs of Genuine Contact, the Four Principles of Open Space Technology, and the Four Immutable Laws of Spirit by Dr. Angeles Arrien.

Leadership Principles & Beliefs



Five Beliefs of Genuine Contact

- Everything is connected and people are precious
- Every organism (including organizations) have within it the blueprint for its success
- Positive change in the organization is directly linked to positive change in individuals. Both are required for sustainable new ways of working
- Optimal health and balance Productive use of individual and organizational energy is best achieved by working with change rather than against it
- Simple frameworks and processes led from within the organization enable success with complex situations happens

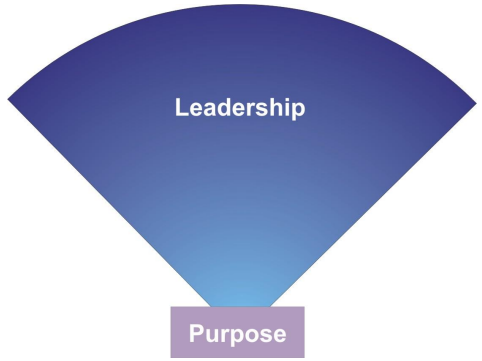
Open Space Principles

- Whoever shows up is the right people
- Whatever happens is the only thing that could have
- Whenever it starts is the right time
- When it's (not) over, it's (not) over

Four Fold Way

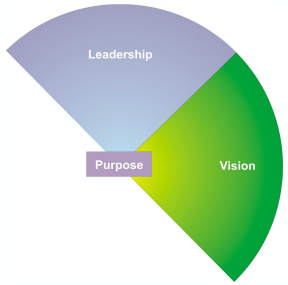
- Show up and be fully present
- Tell the truth without blame or judgement
- Follow what has heart and meaning
- Let go of attachment for outcome

Formal Leadership Structures



Self-selected members lead the International Genuine Contact Organization in specific roles:

- Leaders of Working Groups (project-based groups undertaking activities to fulfil the strategic plan)
- Co-Owners lead the stewardship of Genuine Contact
- Leadership Management Team (LMT) is responsible for the day-to-day leadership of the organization.
- Director facilitates, guides and leads the implementation of the Strategic Plan in cooperation with the LMT. The Director is the only hired leader within the organization.



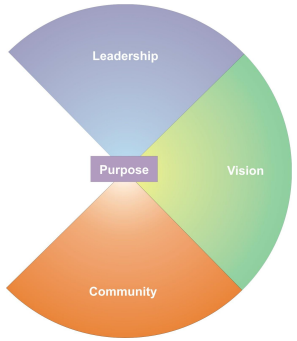
The International Genuine Contact Organization is a place for ongoing learning and capacity development for all members - nurtured by us. This learning and development happens inside the organization and also as we each apply our learning in our own lives and work.

This contributes to members working with Genuine Contact for the benefit of the organizations and communities of which they are a part, through leadership, consulting, or participation.

Members are inspired to contribute back to the organization which creates an energy flow which nurtures the International Genuine Contact Organization in return.

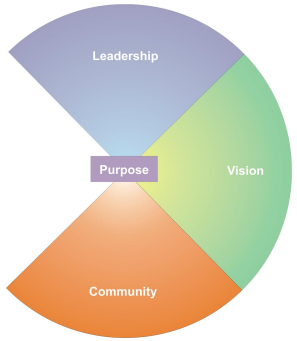
Vision

Primary Client



The primary client for the International Genuine Contact Organization is its members. This includes all membership levels - White, Orange, Green, Blue, Co-Owner, and Organizational.

Beneficiaries

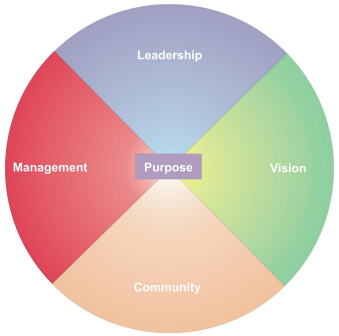


Who benefits from the work of the International Genuine Contact Organization?

By focusing its efforts on the Primary Client (the members), the GCO catalyzes benefits to these Multiple Stakeholders (Beneficiaries):

The people and organizations who the members engage with including clients and customers, staff and team members, colleagues, communities, families, and others.

Management
Bounded by Givens

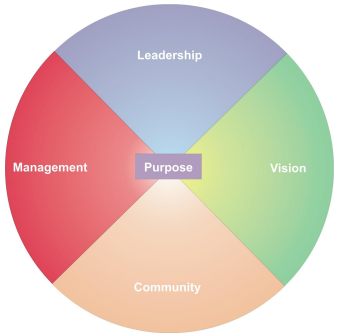


The Genuine Contact Organization is managed within Clear Givens

- **Foundational Givens**: Birgitt Williams and Ward Williams established minimal Foundational Givens for the Genuine Contact™ program. Foundational Givens define the program and are not open for change. Basically, Foundational Givens are keys in defining what the program is and what it is not - in other words, what makes it different from other programs. These Foundational Givens have also been adopted by the International Genuine Contact Organization as part of the foundational structure.

- **Operating Givens**: These minimal additional givens provide further structure to the organization. They are developed by members of the International GCO and approved by the Co-Owners. Operational givens are subject to review and change or deletion, striving to keep operating givens to a minimum and relevant.

Management Approach & Considerations



- The organization is a Strategy Focused Organization and aligns all of its activities, budget, and decisions to fulfilling the strategic plan.
- The organization is dedicated to creating the simplest possible structures to support fulfilling its strategy and encourage participation of members at all levels of the organization.
- We work the Genuine Contact way in all of our activities to “walk our talk” and to give members the opportunity to deepen their experience with this way of working.
- Offering opportunities to learn and work together within a predictable rhythm (e.g. at the monthly International GCO meetings)

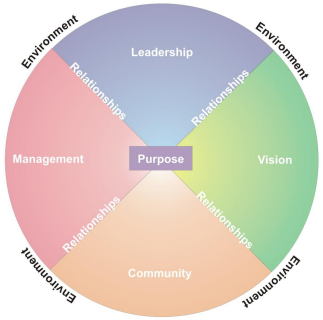
We recognize that the International Genuine Contact Organization is an interconnected organization and care is taken to ensure that all of the parts remain in healthy connection.

Care is taken in developing life nurturing relationships between the different people and roles within the organization.

Circle of the Whole

The International Genuine Contact Organization has lots of moving pieces and many people involved - both visible in their activity and less visibly or invisibly. There are opportunities to stay connected and contribute to the whole picture of the organization through meetings and clear communications. Members have the opportunity to develop their awareness of the whole by being involved in these opportunities to the extent that they wish.

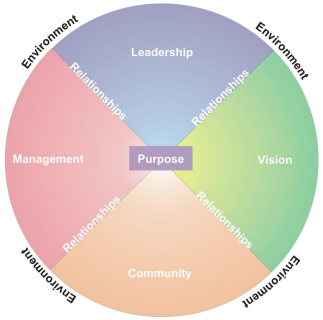
External Environment



The external environment for the International Genuine Contact Organization is vast. Each member of the GCO has a different kind of organization they are leading or different clients/customers they are working with as they apply the Genuine Contact way of working in unique ways. This offers the opportunity to work together in what is common amongst all of the different connections - clearly demonstrating and articulating the benefits of the Genuine Contact way of working.

While the external environment within which we live and work is always one of constant change, at the time of updating this Operating Matrix, it becomes more and more apparent that people worldwide are living and working in an environment that requires leadership into the unknown. With a global pandemic, rapidly approaching climate change targets, and varying levels of social and political unrest worldwide, there is both great challenge and great opportunity. Complex challenges and opportunities that Genuine Contact has the simple tools and processes to support. As an organization, the GCO can be of best service by supporting its members in developing their individual and collective capacity to meet these challenges and opportunities while standing firmly with the Genuine Contact way of working.

Internal Environment



In general, the internal environment of the International Genuine Contact Organization is life-nurturing and offers opportunities for interested members to get involved in ways that offer learning that is applicable to one's individual work while contributing to the collective purpose of the GCO.

The results of the Organizational Health and Balance Assessment undertaken in October 2020 reveal an organization which is life-nurturing and is seen as sitting somewhere between "Letting Go" and "Reframing for the New" in the Grief Cycle. This indicates an opportunity to be conscious of how the GCO can continually regenerate its health and balance. It also indicates that the GCO is in a time of fine-tuning the implementation of recent changes in preparation for new development activities.

Positioned somewhere between "Toddler" and "Adolescent" on the Organizational Lifecycle, this is a time in the organization of paying attention to appropriate structure to support the organization in achieving peak performance while it fulfills its purpose and achieves its vision.

In looking at the organization through the Medicine Wheel Tool, while the organization is fairly strong in all of its components, there is an opportunity for better communicating the organizational purpose and vision and supporting people to strengthen their connection to *the same (*purpose & vision of the International GCO).

High Level Strategies for GCO Case Study (1 of 2)

8 Strategic Approaches guide the activity and decisions of GCO Case Study.

1. Enhancing and expanding GC way of learning with various GC and non-GC organizations with facilitaqtion and mentoring approaches in a simple and “walk the talk” way.
2. To establish the GCO as a thought leader in building the capacity of organizations.
3. Strengthening the existing structures
4. Create platform to build strong collaboration and improved engagement which leads to expansion. Similarly engage training organizations and institutions to improve outreach to large entities.

High Level Strategies for GCO Case Study (2 of 2)

8 Strategic Approaches guide the activity and decisions of GCO Case Study.

5. Boost revenue through increased membership and innovative impact investing methods, leveraging participation in conferences, conclaves, and workshops. Effective IPR protection approaches.
6. Fostering inclusivity in organization and make the offering more affordable to reach people with diverse background to create environment that welcomes and celebrates th richness of all members.
7. Measuring the success of GC Effects
8. Build a decentralized structure with empowered local leadership led by local strategy.

Fostering inclusivity in the organization and making the offering more affordable to reach people with diverse backgrounds to create an environment that welcomes and celebrates the richness of all members.

- An elementary program to reach more people to motivate them towards advanced programs
  - with nominal fee
  - with small time duration
- Solution for different age groups
- Bringing geographical diversity in the Board of Directors

Measure GC Impact Objectively

- togetherness, genuine contact, unity in energy, values and principles, collaborative and shared leadership, supportive environment, facilitating leadership for smooth operations, passion driven leadership, nurturing, learning, applying, regular basis, escalating the benefits through collaboration, interconnections, healthy relationships, communication
- build & showcase evidence (research benchmarks and share success stories)
- impact measurement and success stories
- tracking success collation - data & stories
- expanding GC membership & orienting them the GC Way
- Post-implementation evaluation of behavioral changes, processes, procedures
- More practical examples of people and organizations following the GC Way

Boost revenue through increased membership and innovative impact investing methods, leveraging participation in conferences, conclaves, and workshops. Effective IPR protection approaches.

- Striving to grow to achieve 1L members to the GC Community
- Relook into fee structure
- GCO may attract impact investors / L&D to generate capital (e.g. conferences, SDG conclave or any larger social events

We will work together to support the impact of working the GC Way for our members, strengthening growth and opportunities in the world.

- Reach out to new/more organizations/corporations/non-profits and individuals across the world
- Support our members to be aligned to the UN SDGs and especially to support our members to know the opportunities and growth possibilities in their communities
- The UN SDG makes a bigger room for the opportunity for the GC way of working in commercial businesses
- continue to create/evolve more opportunities for leadership for capacity development world-over
- Community building, networking, workshops, newsletters, add members through network

Create platform to build strong collaboration and improved engagement with lead to expansion. Similarly, engage training organizations and institutions to improve outreach to large entities

- how can one engage more or not be alone as a beginner? More opportunities, visibility, stories
- How does the GCO take care of evolving identities/intersectionalities? (culturally diverse approaches)
- Taking B2B model towards D2C
- Demonstrating the culture of GC
- collaborate with organizations who do not work the GC Way
- Engage with large training organizations to increase the outreach
- build global outreach
- collaborate with organizations who work the GC way
- thought leadership

To establish GCO as a thought leader in building the capacity of organizations

- S - social media/strong presence
- H - highlighting the impact
- O - offline and online volunteering sessions
- W - word of mouth
- C - content, campaigns, competition, creation of brand value
- A - ambassadors / annual journals / assessments
- S - storytelling
- E - events / engagement

Build a decentralized structure with empowered local leadership led by local strategy

- create definitions: develop materials and intellectual property
- expanding into complementary areas such as building the organizational culture aligned with strategy
- keep local brand ambassadors / co-facilitators to engage participants
- have a forum / formal structure for sharing of gc experiences in local geographies (GCO can choose to support in meeting design)
- program
  - training
  - mentoring circles
  - contact meetings
  - learning resources co-created
- have more face-to-face training/capacity development opportunities in different geographies
- impact analysis - client, beneficiaries
  - R3 - revive, revise, redesign / zoom in zoom out
- Country wise chapters

Enhancing and expanding the GC way of learning with various GC and non-GC organizations with facilitation and mentoring approaches in a simple and “walk the talk” way

- continue to “walk the talk” and keep things simple
- onboarding of new members and partners / buddy-help
- concept clarity through discussion in collective circle
- organising community meet
- more opportunities to “feel” gc
- more members in the membership model to increase the capacity of the organization

Strategy Map at a Glance

The Leadership Team and staff use the strategy map as a tool to align all functions toward achieving the organization's purpose, vision and high-level strategies. The strategy map is one page with high-level strategies plus the following layers:

1st layer- value that GCO Case Study is expected to provide to the primary customer from customer perspective

2nd layer- internal processes GCO Case Study must excel at to deliver value to customer via chosen strategies

3rd layer- capacity GCO Case Study needs to be able to run the internal processes

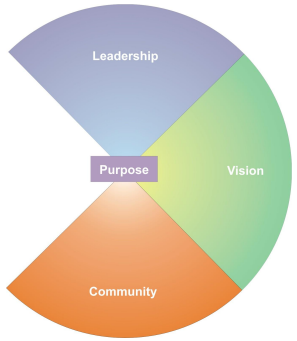
4th layer- financial base needed to fulfill GCO Case Study purpose, achieve vision via chosen strategies

A one-page strategy map for GCO Case Study to be captured on the following page and will be available as a stand-alone document

A generic example of a strategy map (public sector and private sector) and a sample strategy map with a fictitious name yet real data are on the following pages. These should be deleted once GCO Case Study's strategy map is developed and inserted.

Purpose	**Working together to expand the capacity of the organization and its members to spread Genuine Contact in the world.**
Value to the Customer	Quality Mentoring / Coaching Community / Belonging Co-Creation Visibility
Internal Processes	**Operations Management** • Capacity building • Mentoring • Opportunities to practice • Refresh the material • Program management • Risk mitigation • Logistical support (internal) • Constant support • Guidance • Communities of practice **Customer Management** • Annual/monthly rituals • Annual meeting • Loyalty program • Customer grievances • Management systems • Sponsorship process • Customer feedback • Newsletters **Innovation** • Opportunities for being visible • Proactive research • Reward and recognition • Technology • Idea database • Piloting new ideas • Collecting data and evidence • Lateral thinking • Process for documenting • Open space forum **Social & Regulatory** • Ethical guidelines alignment • Alignment to socio-cultural and regulatory frameworks • data/IP protection • Support networks and internal communications for members and between members • Volunteering guidelines • SDG compliance and EHS compliance guidelines
Capacity Requirements	**Human Capacity** • Leadership accountability • Processes orientation • Developing comptencies • System thinking • Diversity & inclusion • Relationship management • Conflict handling • Feedback, rewards, recognition **Information Capacity** • Data sources • Tools and platforms • Information Processing to understand **Organization Capacity** • Defining services • Define ownership and accountability • Define Structures **Collective Intelligence** • Identifying multiple intelligences • Collaborative spaces at work • Celebration of failures • Identifying subject matters experts • Magic moments (unplanned) • Open possibilities for emergence • Maximum diversity in meetings • Humor, friendship, belonging • Collective intelligence • Engage people • Leverage and protect • Listening to learning
Financial Perspective	**Productivity Strategy** Membership Contributions Making volunteer hours visible **Growth Strategy** Build additional income streams Increased membership base

Primary Client



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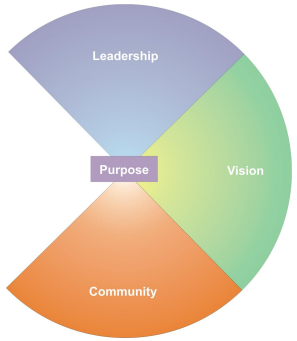

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The people and organizations who the members engage with including clients and customers, staff and team members, colleagues, communities, families, and others.

1st layer: Value wanted from Primary Customer

- **Quality**
- Problem solving
- Customer centric
- Build capacity
- Process driven
- **mentoring/coaching**
- Value for money
- Focused energy
- Empowerment & independence
- Solidarity
- Growth
- Respect
- Listening
- Knowledge resources
- Business development
- Visibility
- Learning & self-growth
- Inspiration
- Capacity building
- **Community**
- Transparency
- Trust
- Executable plans
- Integrity
- Continuous engagement
- Human relations
- Affordability
- **Belongingness**
- Liability
- Direction in strategy implementation
- **Co-creation**
- Engagement to expand application
- Innovations
- Customization
- Consistency
- Enhancing energy
- Customer satisfaction
- Simplified approaches
- Respect
- Uniqueness
- Simplicity
- Accessibility
- **Visibility**
- Enablement
- Business development

2nd layer: Internal Processes to Excel At

To deliver value to customer, GCO Case Study must excel at internal processes in at least these four categories.

- Operations
- Stakeholder/Client Management
- Innovation
- Regulatory and Social

Internal Processes: Operations Management

- Capacity building
- Mentoring
- Create opportunities to practice
- Refresh the material
- Certification program management
- Risk mitigation
  - IP
  - Quality of delivery
- Logistical support (internal)
  - Travel docuemntation
  - Technology
- Constant support
- Guidance
- Networking - communities of practice

Internal Processes: Customer Management

- Annual/monthy
  - Renewal process / exit process for members
  - Onboarding of new members
- Annual meeting
- Loyalty program
- Customer grievances
- Management systems
- Sponsorship process
- Customer feedback
- Newsletters

Internal Processes: Innovation

- New tools to identify
- Finding opportunities for being visible
- Environmental scanning
- New research surveys
- Reward and recognition
- Analysis and need assessment
- Technology
- Idea database: system/process/group
- Piloting new ideas
- Collecting data and evidence
- Lateral thinking
  - Thinking hacks
- Proess for documenting
- Having an open space forum available for everyone to share ideas

Internal Processes: Regulatory and Social

- Ethical guidelines alignment
- Alignment to socio-cultural and regulatory feamworks in countries of operations
- data/IP protection
- Support networks and internal communications for members and between members
- Volunteering guidelines
- SDG compliance and EHS compliance guidelines

Capacity Development

To deliver value to customers, GCO Case Study needs the capacity to be able to excel at the internal processes identified. Strategic choices for capacity development fall into four categories:

- Human Capacity
- Information Capacity
- Organizational Capacity
- Collective Intelligence Capacity

Capacity: Human Capacity

- To learn
- To understand
- Leadership accountability
- Processes orientation
- Rewarding and recognition
- Competencies
- Sharing
- Training
- Transfer of knowledge
- Skill development
- Bridging the gap
- Intervention
- System thinking
- Identification of potential
- Diversity
- Observation
- Manage relationships
- Empathy
- Equity
- Energy
- Inclusion
- Spirit
- Table of work in a team → distributed
- Listening actively
- Conflict handling
- Empowerment
- Give and open to feedback

Capacity: Information Capacity

- Data sources
  - Members
  - Content
  - Workshops
  - Stakeholder feedback
- Tools and platforms
  - ERP / CRM
  - BI Tools
  - Data Analytics
  - LMS
  - Security frameworks and protocols
  - Storage and backups
- Information Processing to understand
  - Outreach
  - Impact
  - Future processes

Capacity: Organization Capacity

- Defining services
- Define ownership and accountability
  - Monitoring and evaluation
  - Expansion
  - Revenue Generation
  - Training and content
- Define Structures
  - Flexible
  - Self nomination
  - Redundancy for each role
  - Processes

Capacity: Collective Intelligence Capacity

- Tapping, identifying multiple intelligences
- Collaborative spaces at work
- Celebration of failures (tell the truth without blame or judgement and notice efforts)
- Identifying subject matters experts within
  - Conduct learning exercises with each other
- Magic moments (unplanned) Relationships compassion - releasing the knowledge and blueprint
- Open possibilities for emergence of freedom, safe space
- Maximum diversity in meetings
- Humor, friendship and a feeling of belongingness
- Collective intelligence
- Needs facilitation/ attributes to engage people
- Leverage and protect, promote (appreciate) collective culture by leadership
- Listening to learning - learning to listen
- Why collective intelligence???

4^{th} layer: Financial Perspective

The Genuine Contact Organization's primary revenue source is membership contributions. These membership contributions include:

- Annual financial contribution from each member
- Hours contributed by members towards the fulfillment of the organization's strategic plan

One focus of the financial considerations is to increase the number of members in the organization. With more active members, the organization increases both the financial contributions received and the volunteer hours available, strengthening its financial base in different ways.

Another focus of the financial considerations is to diversify income streams. Areas to focus on during the strategic planning and implementation include:

- Opening a publishing house so that members can publish through Genuine Contact rather than self-publishing
- Offering workshops through the Genuine Contact Organization with a revenue-sharing model between the organization and the facilitators

Strategy focused organization impact for staff

- Working in a better aligned, strategically focused organization for heightened job satisfaction
- Clear understanding of how each position has value in achieving strategies for better understanding of how work is meaningful to the enterprise
- Clear understanding of how the work of each team has value in achieving strategies for a better understanding of how work of the team is meaningful to the enterprise
- Employees have real and clear ownership of their work

Authority to get the job done

All work undertaken by members of the GCO is done within the expectation zone of the organization's foundational and operating givens as identified on page 11 of this document.

Decision making authority is devolved across the organization according to the current decision-making matrix.

Functional Organogram

In order to translate the functional organogram into a reporting organogram, an analysis can be done of the functional groups needed for success with the internal processes and capacity development.

During the strategic planning workshop, a variety of functional organograms were developed and are available in the Learning Hub for review.

Reporting Organogram

Considerations for Reporting Organogram

Reporting organogram must be developed in relation to the functional organogram to ensure that ‘form follows function’ and to avoid the necessity of an informal organization to get the work done because the ‘formal’ organization has not been structured so that work can get done.

During the strategic planning workshop, a variety of reporting organograms were developed and are available in the Learning Hub for review.