

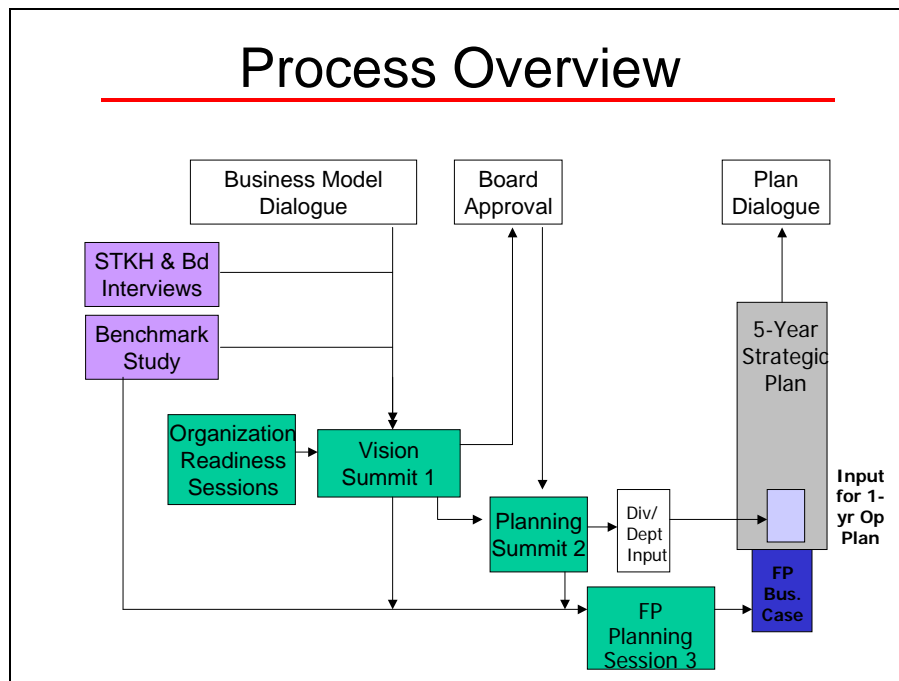
## RAPID HIGH-PARTICIPATION STRATEGIC PLANNING

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

We – Sallie Lee, Debbie Morris, Birgitt Williams, Ward Williams, and Steven Garcia – were invited to bid on a strategic planning process for “GWA” (not the actual name). It had the markings of a nightmare project: complete within two and a half months while involving the workforce, a geographically dispersed board, and external stakeholders. The organization runs 24-hours-a-day and some of the leadership believed a for-profit entity was the answer.

We created a multi-layered approach incorporating and blending Appreciative Inquiry (AI), Open Space Technology (OST), Whole Person Process Facilitation™ (WPPF), a benchmark study, and OpenSpace-Online™ Real Time Conferencing software. Here is our story of this successful planning “speedboat.”



### CLIENT AND PROJECT BACKGROUND

Founded in the early 20<sup>th</sup> century, GWA was one of many organizations dedicated to eliminating undesirable social conditions. Today, GWA's budget is approximately \$12

million, with 250+ employees, providing daily services to thousands in the United States, Puerto Rico, and the U.S. Virgin islands.

GWA faced several significant challenges. Their mission and identity conflicted. Over the last eighteen years, a government service contract that provided major revenues was ending. A potential new contract would change some of GWA's core competencies. With privatization of many public services, GWA's ability to fund its central mission was in jeopardy.

The strategic planning process goals were to:

- (i) Build a five-year plan;
- (ii) Create a business case within the plan's context informing the decision to launch a for-profit business; and
- (iii) Provide input for the 2005 operating plan.

## **PHASE 1: PREPARATION**

Our first steps with the management team, were to establish goals, schedules, and planning parameters or "Givens". Givens define perceived non-negotiables for participants. For example:

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

'Givens' do not inhibit discussion, but set expectations for post-meeting implementation, ensuring the process does not send people's energy "out of bounds." Consultant Birgitt Williams created the concept, finding it a critical success factor for long-term benefit to organizations using OST.

Next, the consulting team met with the GWA design team. In one intense day, the team built a shared vision of the process, named it, created a graphic, and developed invitations and project plans for each event. They also identified the GWA communities to be represented, given that 24 hour staffing of phones prohibited 100% attendance at each event.

Concurrently, consultants Sallie Lee and Debbie Morris developed appreciative inquiry protocols to conduct and document interviews with stakeholders and Board members. Time constraints and existing demands prevented GWA staff from doing this task. This approach made these voices available in SOME way rather than not at all. Verbatim summaries about trends, opportunities, GWA assets, capabilities and core competencies were provided as inputs to the Vision Summit.

***Six organizational readiness meetings, led by Birgitt and Ward Williams, prepared everyone for participative planning. All staff shared 'mad, sad, or glad' stories of the past and present, which helped people complete unfinished business from the past and***

release energy for planning the future. These meetings and meetings with the executive team used WPPF™, a facilitation process that taps people's intellectual and intuitive wisdom and is congruent with AI and OST.

## **PHASE 2: MISSION REAFFIRMATION AND VISION DEVELOPMENT**

**A one-day AI vision summit led by Sallie Lee** built a vision statement using personal stories and inputs from stakeholders, board members, and employee readiness meetings to confront external realities and discover GWA's moments of greatness and strengths. The sixty participants were from all parts and levels of GWA. The intense commitment to GWA's storied past and promising future was a defining moment, especially for the new Board chairman and GWA CEO.

## **PHASE 3: STRATEGIC PLAN DEVELOPMENT**

After the Board approved the vision, sixty participants drawn from every level, department and the Board, worked with Birgitt and Ward Williams to develop the agenda for a **planning summit using OST**. By noon of day 2, participants had crafted GWA's strategic plan, collectively agreed on goals, determined responsibility for each, and identified actions and resources. After the meeting, these plans were further refined by existing work teams.

## **PHASE 4: FOR-PROFIT BUSINESS CASE DEVELOPMENT**

In a one-day alignment meeting facilitated by Birgitt and Ward Williams using WPPF™, the management team:

- ❑ Established financial parameters for a for-profit business,
- ❑ Identified parameters were it to become a separate entity;
- ❑ Aligned and clarified the purpose of a for-profit business,
- ❑ Identified structural options, and
- ❑ Identified additional options for GWA's financial security.

Through the process, the team achieved a level of conversation and alignment absent from earlier discussions.

With a clear context set, GWA staff, guided by consultant Stephen Garcia, **benchmarked** eight nonprofits with successful for-profit businesses. This outward focus helped GWA leaders learn the challenges and opportunities of social entrepreneurship.

The benchmark study then fed a **Virtual Open Space Technology** meeting to consider a for-profit business. The Internet-based meeting of 40 people from across GWA was a practical, inexpensive approach. The resulting transcript supports continued planning.

***After the proposed plan was presented to the Board,*** executive staff worked with lead consultant Debbie Morris to further align objectives, activities and measures into a strategy map so that everyone knew exactly how to proceed. GWA's identity, focus and a path came newly alive.

## **OUTCOMES**

While too soon for long term results, management and employees are aligned and motivated, with increased clarity regarding GWA's mission and goals. People reported delight in the process, significant personal learning, greater satisfaction, and surprise at the work completed in so little time.

Many were astonished that across the organization, people saw the same problems and opportunities and were now looking to the future together. Senior staff remarked how several strategies emerged from the summits in a stronger way than they might have otherwise. Employee passion and dedication was visible to all, and Board members who participated valued the immersion into GWA's inner workings. A comment from the planning summit said it best: "We each came here as an individual to represent our own views and secondly the perspective our part of the organization. At the end of the day, we were all thinking about the good of GWA as a whole."

## **OUR REFLECTIONS**

One surprise was how seamlessly these approaches blended. We believe it is because they share common assumptions and principles: the value of wholeness, of incorporating all voices, and of changing an organization's inner dialogue with fresh thinking and powerful, democratic conversation forums.

As a consulting team, we needed to be flexible. Our willingness to see what was needed, set aside purity of practice while keeping the essence was a strength. For example, in AI we don't normally focus on sad and mad stories, only the "glads." Seeing its value as preparation for the other work, we included it. Along the way, we surprised ourselves at the speed with which we engaged, involved, and innovated with grace and ease, in true partnership with our client system.