

THE GENUINE CONTACT™ WAY OF WORKING

Orientation to the Strategic Plan Refresh Report

By Rachel Bolton, Anna Caroline Türk, and Ann-Heidi Paulsen Orvik
Prepared on behalf of the Strategic Plan Refresh Team

This Session within the Strategic Plan Refresh

This session was held on October 5 and October 7. It was offered twice, at different times of day, to accommodate a variety of time zones and differing work schedules. The Orientation Session served to kick off the Strategic Plan Refresh process for our organization as a whole. It is the first of 4 opportunities for engaging with the collective wisdom of our whole community during this process.

Prior to the session, participants were invited to read 3 documents that would help to provide a frame of reference for what we are setting out to accomplish and why we are doing it at this time:

- [Why Develop an Operating Matrix](#) - If you aren't familiar with the concept of an Operating Matrix, this document will give you an overview of what it is and why we create one when we are doing Strategic Planning the Genuine Contact way.
- [Strategic Plan Refresh Process Overview](#) - If you're a process geek (and aren't we all :-)!), this will give you a high level overview of the process we are embarking on together. Seeing what all of the pieces are can sometimes help us to see where we fit in.
- [Original 2012 Strategic Plan](#) - Our original operating matrix and strategic plan, so you can see what we are starting with as we embark on this update. It's a great feeling to know we've accomplished this plan!

During the session, we opened the Whole Person Process Facilitation container for this whole strategic plan refresh process. Participants were oriented to all of the parts of the work we are doing during this process to develop a clear picture of our process and a sneak peak into what strategic planning the Genuine Contact way looks like. The process was designed to help each participant better understand how the contributions they might make in the other parts of the process will fit into the bigger picture.

[You can see the compiled notes from both sessions here.](#)

Did you miss the orientation session? We've prepared an orientation self-study package so that you can listen to the recording from the October 5 session and follow along to complete the orientation activities for yourself. This recording is about 97 minutes long and the orientation process will take approximately 2 hours to complete. [Get started with this self-orientation here.](#)

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The Invitation

In mid-September, a Save the Date notice was sent out to all members of the organization and via the Genuine Contact List for these session dates. In the last week of September, an invitation was sent out through the same channels to RSVP for each person's preferred dates. Those who RSVPd to attend included a broad spectrum of stakeholders of our international Genuine Contact Organization:

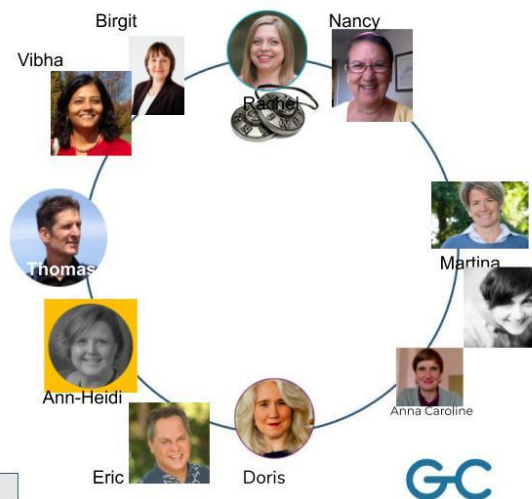
- all levels of membership - white, orange, green, blue, co-owner, and organizational and those who are not members at any level
- all levels of workshop participation - from having not taken a GC module right through to Trainers
- all levels of engagement with the international community - from people who are showing up on the list every day to those who haven't communicated in years or perhaps never at all, people who are very active now and those who used to be years ago but haven't been active for quite some time

Of the 18 people who registered, 14 participated in these Orientation Sessions in addition to the facilitators.

Orientation to the Strategic Plan Refresh

Welcome to the circle!
Please take a seat by adding your name or photo where you wish to be seated.
If you haven't already, join the video call by clicking the "join video for main space" button.

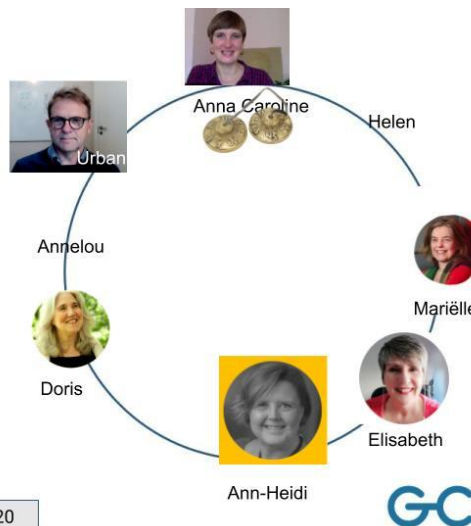
1st Meeting // Monday, 5th October 2020



Orientation to the Strategic Plan Refresh

Welcome to the circle!
Please take a seat by adding your name or photo where you wish to be seated.
If you haven't already, join the video call by clicking the "join video for main space" button.

2nd Meeting // Wednesday, 7th of October 2020



Introduction, Welcome & Setting the Stage

These 2 meetings were facilitated by Rachel Bolton, Anna Caroline Türk, and Ann-Heidi Paulsen Orvik. Doris Gottlieb and Elisabeth Tepper Kofod participated as members of the Leadership Management Team, who are the sponsors of this process. It began with some words of welcome by the facilitators, followed by a welcome and short presentation from Doris.

Story Leading up to the Meeting

As part of the welcome on behalf of the LMT, Doris shared some of the highlights of the story leading up to this meeting and leading up to the need for this strategic plan refresh. Highlights included:

2012	Strategic Plan – Big Aha: “We are a membership organization”
2012-2017	Building the foundations needed
2017	Organizational transformation into a strategy focused organization
2019	Organizational transformation to add membership structure New income streams: GC Specialty Series, GC publishing house NEW Branding for GC
2020	We’ve fulfilled the plan & are looking to the future together with you!

Givens for the Strategic Plan Refresh

Givens provide the container within which there is freedom to play, be creative, and innovate together. For this strategic plan refresh process, 3 givens have been identified and were shared with the participants:

- The strategic plan refresh process will be conducted within the current givens of the organization - both the foundational givens and the operating givens.
- The process will be conducted within the current organizational structures - this includes our current membership structure, communications structures, information management structures.
- At present, there is no budget allocated for the strategic plan refresh process nor for the implementation of the plan beyond the budget we are already working within. Any additional monies needed to fulfill the plan will need to be developed as part of the implementation.

Transfer In

With the story up to now and the givens as a framework, participants were invited to choose a Developing Leadership reflection card and to reflect on *what this card was conveying to them about the next phase of Genuine Contact*.

They had the opportunity to discuss their reflections in pairs and then to introduce their partner and key highlights from their partner’s reflections with the group.

A Brief Overview of Our Process



Part 1:
Orientation to the
Strategic Plan Refresh



Part 2:
Organizational Health and Balance
Assessment



Part 3:
Storytelling



Part 4:
Open Space Technology Meeting



Part 5:
Data Creation - Strategic Plan Update



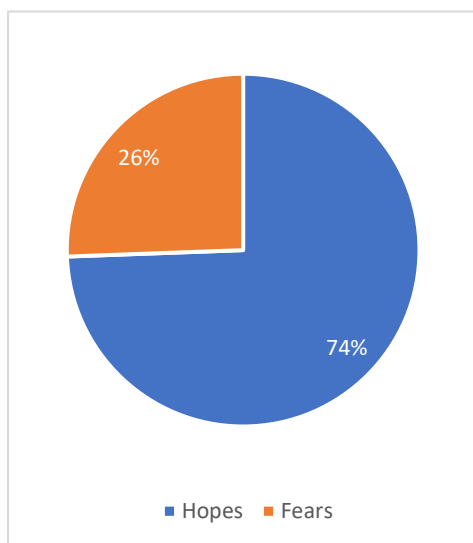
Part 6:
Implementation
over the coming years



After the Transfer In, participants were oriented to the 6 parts of the Strategic Plan Refresh Process. [You can read a detailed overview of the Strategic Plan Refresh Process here.](#) The key parts including dates and time commitment for participants can be found in Appendix 1.

Hopes & Fears

Having been oriented to what will be happening during this Strategic Plan Refresh process, participants were asked to consider their Hopes and Fears for the process. They shared these hopes and fears first in small groups and then presented the highlights of their conversations to the collective circle.



In total, 43 individual hopes and fears were shared between the 2 sessions. Of these:

- 74% (32) were Hopes
- 26% (11) were Fears

When substantially more hopes are shared, it can suggest that the members of an organization have hope for both the present and the future. This hope is an important ingredient in a strategic plan refresh process.

Leadership and ownership of any change effort (in this case, our strategic plan refresh and the implementation of this plan) lies within the people who have a stake in successful progress and outcomes. Successfully engaging people in this leadership and ownership is dependent on whether they are fueled by hope or held back by fear.

Hope filled people experience heightened personal energy, creativity, innovation and a sense of expansiveness to more opportunities. They may not be ready to embrace the change effort before developing more of an understanding. Some work will need to be done for that to happen. However, having people fueled by hope is a great source of energy for accomplishing really good outcomes.

The hope expressed during this exercise is a good indicator that as an organization we are ready to move forward into this strategic plan refresh process. That it is tempered by some fears offers balance and tempers that unbridled hope with a realistic outlook.

The Hopes and Fears include:

Hopes

- Energy boost leads us to finding good form/structures that are just right for where we are now. To use our resources
- Energy boost for us all and our organization!
- Process to create more awareness both in terms of after the plan, and in doing it that it will encourage awareness in our greater community people may want to join process.
- Process provides us with ways to move forward
- And people feel motivated to take leadership and action in implementation
- Hope be finished in 90 days, fear it will stretch out.
- Hope to keep simple, and easy to communicate.
- Hope people will learn how to use this tools in practise by following our process.
- Hope that time limit becomes creativity and energy boost and helps making decisions
- Much learning for everyone involved. Benefits will grow from us learning deeper.
- Walk our talk and have a life nurturing process w/o avoiding difficult themes.
- Bringing in new members and moving forward
- Experience GC strategic planning in an online environment (Eric too!)
- What went well in the previous plan and what not? Did we make any mid course changes while implementing the plan. (Eric too!)
- Learning by doing how to create a GC strategic plan
- Have fun together
- cycle up the mont Ventoux without crashing, lack of oxigen (Tour the GC)
- meet new people and feel connection despite of online meetings
- have a bit of fun
- hands on, clear time line during the process
- simplicity shines through in the creation of te GC SP - with the primary colours
- it is a refreshing exercise, wind in our back
- Learn to operate qiqichat-machine.
- Be in harmony with qiqocha
- That I can contribute also from my heart, not only logic
- Have a robust refresh at the end of the process.
- People involved in leading it stay in balance and don't get exhausted
- Keep the balance between going forward and still being able to deal with the issues that come up
- That we (continue) to reach and attract a large group of people to the process.
- Able to create this Open Space like in card for all the energy keep it open not closing too early.
- That by doing this it will become even clearer what GCO is and and will find as yet unknown aspects of this way of working in its wholeness
- Clarity in the meaning of important subjects (different cultures)

Fears

- May run out of energy because of the speed.
- Not having the courage to speak about the elephants in the room
- That we don't keep engagement and inspiration from many, throughout the process including implementation
- That we forget to pace ourselves in the implementation and forget to respect our learning process as we move forward and the hope is we remember that a different pace may be needed for implementation
- Going too fast and not noticing enough.
- Will be overwhelming for those who are not familiar with the existing plan
- To take part in all the parts because of different time zones and traveling.
- Taking sessions one at a time depending upon my sleep patterns.
- Medium we're using, I like a bit paper on the floor and be active instead of seated.
- tool don't distract from the ideas, the process.
- Losing curiosity which as a hope, is having the curiosity during the whole process so we keep exploring the meaning of the words we are talking about.

What is Needed for this Process to Feel Successful

Participants were asked to consider their experiences up to now in life and in the organizations they are a part of, as well as what they had shared and heard in the Transfer In, presentation of the process, and Hopes and Fears. Based on these considerations, what did they need for this process to feel successful?

In each session, the participants formed small groups for discussions and then shared the highlights of their discussions with the collective circle. There were a few distinct themes that emerged in the needs that were identified:

- Being in **Genuine Contact** – with self, others, the community, and creation
- Paying attention to **Health and Balance** – for each of us as individuals and for the organization
- **Inclusion** – paying attention to and creating space for varying needs – energy levels, language, sound, physical space, virtual space
- Opportunities for **learning and contribution** that feel valuable
- Good **Outcomes** (feeling that the process was successful), **Outputs** (having a plan that reflects the contributions made), and **Implementation** (seeing how the plan will be fulfilled and how to contribute to that)
- Experiencing a **Genuine Contact process** that offers good communication, transparency, joy, participation, creativity, and open space for divergent thinking

The highlights of the expressed needs include:

- Clear steps taking us from where we are now to understanding where we are going - what needs to be done next
- Paying attention to language differences and acoustics
- Balance between my own work, my life, and my engagement in this process.

- High energy in the meetings/engaged participants
- That it will have a concrete and powerful outcome
- Transparency
- Sticking to the schedule
- One or all of these three - New learning, contribution/idea that has been included in the plan and some action point to be acted upon when the plan is to be implemented.
- Why now starting the process? Why not in 2 years? → Background information needed for me as a newcomer
- If I see the application of the GC and WPPF tools and processes for a strategic plan
- Enough reflection time to stay in the process
- That we continue to walk our talk even when it becomes difficult.
- Stay aware of GC with myself and with the organization and have ways to express if I am feeling out of alignment...not that it has to change but there is space for expression.
- That we have a clear simple plan that we can implement
- Good communication in between the steps that helps me stay connected
- In the past I notice I may have said that I need to have trust in the process but right now I feel that I have that and that being in GC with myself will help me stay in trust and that is enough.
- Joy and open space for thoughts that is not yet finished, that need dialogue to get better.
- The guidance of the better skilled/ experienced members to be on track.
- In order to be successful there must be stamina build in the process, on the outputs and in balance of understand being kind to ourselves, not moving forward faster than we are able, strategic plan can get in your head, and in my head everything can happen and I set unrealistic expectations and lose sight of progress.
- Clear communication. Simplicity. That I feel attracted to the outcome to move forward.
- Playfulness and room for creativity, co creation in the process. Internet keep working.
- If I have a feeling of belonging to the GC community, that I can decide if I belong here or not (as a newcomer). I don't have a platform for open space and meeting facilitation.
Platform: inspiration, discuss development, exchange experiences
- Involved at start of GC trainings (2007). Now space has opened up in my life to participate: jump in with the official group again, with the collective. I know I have a seat from before. Maybe it's about reconnecting with people from NZ (GC trainers): recreating NZ platform.
- I'm in the middle: success if there's a clear picture how to go about with the hubs and the GCO, make each other stronger.

Reflections

After hearing the presentations of what is needed, participants were asked to slow down for a few moments and reflect on what it is they had heard and experienced. These are their reflections:

- How much care and consideration this community has for everyone and the process.
- Feeling excited, calm, and confident
- Great learning from the past. And, it's important to remember that this is not what we're doing now, that we're doing something totally new.
- Diversity of our experience. How much we can learn from one another.
- Accountability: task assignments and periodic review on progress and modifications
- Trust in the process. Trust in the team that is leading it. Trust in the community. Trust in potential of GC, from lived experience.
- Have a high awareness of how we can include everyone as good as possible/language/background info etc
- Noticing all the trust expressed in a lot of hopes and so few fears. Hope this is correct and not my assumptions.

- View from the outside from people who are quite new at GC
- Strategic plan Team should be involved right from the beginning to avoid the “not invented-here-syndrome”
- Aha : important in this process to have different ways to voice my thoughts, more opportunities, giving me time to reflect
- Different ways communication, communication is important
- Joy, playfulness and simplicity are coming up and is important to bring further
- In need to be a common process, a place to connect with each other, and myself so the hole can grow
- Have a room and space to tell our needs, give possibility to feel safe, connected, bringing the whole person
- The word spirit comes to mind - not sure - acknowledgement of spirit
- Attracted me - bigger picture - hope and need outcome that this contribute in a positive way in community and planet/ hole galaxy. (life nurturing)

Exploring the Strategy Focused Organization

The final activity in the Orientation Sessions was to explore our understanding of what a Strategy Focused Organization is. Participants were asked to spend some time in individual reflections, then in small groups to discuss their reflections, before presenting the highlights to the collective. The questions posed were:

- What is a strategy focused organization?
- What are behaviours of individuals within a strategy focused organization?
- What are the benefits of the organization in investing in being a strategy focused organization, if any?
- Would you like to work in the organization that you have described, achieving the benefits you listed?
- Do you experience such an organization in our international Genuine Contact Organization?

Across the different individual and small-group reflections, there were general themes that emerged about what a strategy focused organization is, the behaviors of individuals, and the benefits of working this way. Participants heartily agreed that they would like to be a part of a strategy focused organization. And generally, our international Genuine Contact Organization is experienced as being strategy-focused, though with some acknowledgement that we can continue to improve in working this way together.

The responses to each question follow:

What is a strategy focused organization?

- The whole potential of the individual is welcome
- Takes the whole organization together, don't work in silo's
- The strategy follows the beliefs of the GCO; everything is involved
- Close relationship to their goals and resources
- Having clear and embodied leadership values
- Clear vision of how success will look like
- Consciousness about the right methods
- Everybody feel sense of alignment or belonging / sense of ownership
- All activities and actions are aligned to the direction we are heading
- Everybody knows that there is a strategy - is referred to and invites participation
- Strategy Is alive

- Ownership throughout the organization
- Know where we have been, where we are and where we want to go (generally)
- Reminded of Organization Health and Balance questions
- Navigation - a general destination,
- An organization that has a strategic plan and follows it. Implements it.
- Working on the goals on a daily basis
- The word strategy brings to mind the military, focused on winning a game or a war.
- Threads open
- Acknowledge the unknown
- A shared desire and strategy helps put it in form
- Bring light into our pathway like sunrise and brings it lights up and expands have light shining on what we do.
- People are engaged in it.

What are behaviours of individuals within a strategy focused organization?

- People feel very secure
- People know what the agreed actions are, and are motivated to do them
- People feel free to speak up, comfortable speaking their views without being judged or without any bias from leadership.
- People are more loyal and take leadership for the organization and themselves.
- Energized individuals
- Individuals use the strategy when making decisions and actions
- People talk about the strategy - are aware of it in daily life
- People are empowered to take initiatives because they know both the limits and the goals
- Trust within the organization within the organization between individuals because if something is done we can see where it fits within the strategy.
- How do we choose to work together , come back when we get off course
- Life enhancing, recognizing value of diversity and diverse perspectives
- Understanding a holistic approach to working with GC
- Resilience
- Trust
- They depend on the purposes
- **Aligned** with strategy
- The heart and mind are connected. You can be there with your whole person.
- In a GC Strategy focused org.
- NOT sitting in a room separated from others
- Like a murmuration of birds
- People make choices because I know what choices because there is a clear guideline
- Clarifies our alignment

What are the benefits of the organization in investing in being a strategy focused organization, if any?

- Plans and actions are implemented as they are agreed on
- More resilient organization
- People more confident taking actions
- It creates a relaxation, resting on the decisions made. Can track back to the strategy. (relaxing to the action)
- People feel empowered and can contribute/take leadership
- High impact - increased and sustainable prosperity
- Because there is a common focus it is easier to reach your goals.
- Reach your destination/ your vision, without anyone falling overboard or the ship sinking
- That it fulfills its goals.
- You work on your purpose

- You can feel the time is right to do certain things- You execute things when the time is right. There's no need to push
- It has a purpose The activities of the participants are aligned with the organizations purpose
- Relax into the strategy so you can be open for surprises
- Can deal with surprises because we have this purpose and make choices about them.
- Intangible visible to the outside Drawing forth from essence of the organization and the energy that is emerging from that

Would you like to work in the organization that you have described, achieving the benefits you listed?




- Yes
- Yes
- Sure, if I like the destination and the crew onboard
- Yes
- Yes




Do you experience such an organization in our international Genuine Contact Organization?

- Yes
- **We are on our way,** and lots can be improved. Like more people knowing about it.
 - Can improve how we individually keep it alive and keep it close.
 - Commitment to do this it's a learning curve that we're committed to and still building capacity.
 - We can use the strategy map more consciously as we continue to learn
- So far, so good
- Yes
- Yes, I think so but don't know need more experience of the organization and need to investigate

Appendices

Appendix 1: Process Overview: Dates & Time Commitment

Discernment		
<i>Date/Time</i>	<i>Description</i>	<i>Who is Involved</i>
Session 1: Oct 5, 3-6 pm CEST OR Session 2: Oct 7, 9 am - 12 pm CEST	 Orientation to the Strategic Plan Refresh	Everyone Time commitment: 3 hours attending 1 session.
Open Oct 5-12	Survey	Everyone Time commitment: 15-30 minutes on your schedule
Readiness		
<i>Date/Time</i>	<i>Description</i>	<i>Who is Involved</i>
Session 1: Oct 12, 9 am - 12 pm CEST OR Session 2: Oct 19, 3-6 pm CEST	 Organizational Health and Balance Assessment	Everyone Time commitment: 3 hours attending 1 session.
Session 1: Nov 4, 5-8 pm CET OR Session 2: Nov 13, 9 am - 12 pm CET	 Storytelling	
Engagement		
<i>Date/Time</i>	<i>Description</i>	<i>Who is Involved</i>
Session 1: Nov 12, 3-6 pm CET OR	Open Space Technology meeting for the purpose of exploring issues and opportunities for the future of	Everyone Time commitment: 3 hours attending 1 session.

<p>Session 2: Nov 13, 9 am - 12 pm CET</p>	<p>Genuine Contact and the international Genuine Contact</p>  <p>Organization (theme to be confirmed)</p>	
<p>Construction</p>		
<i>Date/Time</i>	<i>Description</i>	<i>Who is Involved</i>
<p>Session 1: November 17, 10 am - 4 pm CET (additional dates to be determined as needed)</p>	<p>Refresh the Strategic Plan and the Operating Matrix based on the inputs received during Discernment,</p>  <p>Readiness, and Engagement phases.</p>	<p>Strategic Plan Refresh Team</p> <p>Other participants can join if you wish.</p>
<p>GCO Monthly Meeting: December 8, 3-6 pm CET</p>	<p>Presentation of the refreshed Operating Matrix to the community for feedback and additional input.</p>	<p>Everyone</p>
<p>GCO Monthly Meeting: January 12, 3-6 pm CET</p>	<p>Decision Making with the intention to approve the updated Operating Matrix.</p>	<p>Everyone per our Decision Making Process.</p>
<p>Implementation</p>		
<i>Date/Time</i>	<i>Description</i>	<i>Who is Involved</i>
<p>Ongoing</p>	 <p>In cooperation with the LMT and Co-Owners, the Director is responsible for leading the implementation.</p> <p>Everyone is welcome to attend the GCO Monthly Meetings (2nd Tuesday of every month beginning at 3pm CET) as one way to participate in the ongoing implementation of our strategic plan.</p>	<p>Director LMT Co-Owners All Members</p>

	Work done by members towards the fulfillment of the strategic plan earns contribution points towards your membership renewal.	
Monitoring & Adjustment		
<i>Date/Time</i>	<i>Description</i>	<i>Who is Involved</i>
Ongoing	Measures by which we can track the successful implementation of the strategic plan will be developed during the Engagement and Construction phases.	Director LMT Co-Owners All Members