Future Generations: Strategic Planning Session
Franklin, West Virginia August 26,2003
Held at the Pendleton Community Bank
Facilitated by Jim Hoggan and Nancy Spooner

DRAFT for comments/corrections/additions

Table of Contents

Annexes:

I. SETTING THE STAGE:
Purpose of the Workshop:
Planning and brainstorming session to develop the fundamental elements of a 3 year plan.

Outcome of the Workshop:
The rough outline of a 3 year implementation plan to achieve the Mission of Future Generations to include:

- (key) Goals
- Objectives
- Strategies
- Tactics, and
- Methods of evaluation

To be added:
Graphic with boxes showing the GOST
Graphic Goal, vertical line, arrows showing pressures in both directions (propelling or driving forces and restraining forces)

Ground rules:
- ❖ Encourage quiet people to speak

- ❖ Listen
- ❖ No bad ideas (there are….)
- ❖ Continuous caffeine
- ❖ It's a safe place
- ❖ Don't pressure people to speak
- ❖ Speak once to the issue, then let others speak
- ❖ Don't smile all the time
- ❖ No restating of others' points
- ❖ No side discussions
- ❖ No grabbing of others' ideas
- ❖ Think of the field
- ❖ Be positive
- ❖ Focus on the issue, not the person

II MISSION STATEMENT-ELEMENTS

- ➢ Future Generations teaches and enables a process for equitable community change
- ➢ Or process integrates environmental conservation with development
- ➢ As an international school for communities we provide training and higher education through onsite and distance learning
- ➢ We support field based research
- ➢ We provide successes that provide for rapid expansion
- ➢ We build partnerships with an evolving network of communities that are working together to improve the lives of generations yet to come

III. STAKEHOLDERS

- ▪ Our entire staff/potential Future Generations staff
- ▪ The Future Generations Board of Directors
- ▪ All partners in our country programs:
  - o Communities looking for answers to problems
  - o Country governments (at multiple levels: national, regional and local)
  - o NGO and other intermediaries
  - o Outside-in experts
- ▪ Existing donors/potential donors (philanthropic individuals, foundations and other organizations wit an interest in supporting community-based change)
- ▪ Like-minded NGOs, academic, research and policy-oriented institutions and other organizations that could benefit from our theory and approach (eg "green" educational institutions)
- ▪ Professional organizations that intersect with community change
- ▪ Individual development practitioners, including community leaders
- ▪ Potential students (and Masters students as soon as the program starts in 2004)

Priority Stakeholder Groups (consolidated categories listed in order of importance)
1. Communities
2. Donor Groups
3. Change Agents (including scholars)

4. Top-down Agencies (government)
5. Potential Staff

Of less importance:
- Future Generations Board
- Potential students
- Social entrepreneurs
- Future Generations staff

IV.GOALS
In priority order (# of votes in brackets):
1. Position Future Generations as a cutting edge, innovative, small, flexible organization.[9]
2. Work with communities to identify, document and promote successes to build momentum for scaling up using scale-squared centers.[9]
3. Incorporate both development and conservation in all programs.[9]
4. Identify, link with and enable 20 nodes (autonomous contagious centers) around the world that are using the Future Generations process (this is the 3 year goal that leads to the 10 year goal of 100 nodes)[7] Intermediate step: identify institutions, organizations and communities with whom to partner.
5. Ensure that Future Generations becomes a sustainable organization. [6]
6. Develop formally accredited higher education degree programs based on site and distance education.[5]
7. Build into all field activities a participatory research component including monitoring & assessment best practices etc.[5]
8. Develop short term and continuing education & learning such as short courses workshops and certificate/diploma programs [4]

V. DRIVING FORCES
The top 6, in priority order: (# of votes in brackets)

1. We strive to be the best in the world at the "how" of community change. We study, demonstrate and teach community change (10)
2. We have an organizational system/approach based on scholarship (9)
3. A supportive Board of Trustees and strong leadership (7)
4. A pronounced upswing internationally in the interest and use of community development approaches….because the world is in a mess (7)
5. A dedicated cadre of consistent donors (6)
6. New, greatly expanded, staff with clean slates, new ideas and desire to grow. A team that works well together (4)

For a full list of Driving Forces, see Annex C

VI. ACTION ITEMS TO STRENGTHEN DRIVING FORCES (need to put in same order as Section V above)

1. Study, Demonstrate and Teach
   - ✓ Include STUDY in the demonstration projects
   - ✓ Use the TEACH to increase the number of nodes (Goal 1)
   - ✓ Integrate this strongly into the communication message (Goal 13)
2. New, expanded staff
   - ✓ Use the networks of new staff to identify nodes and get the message out
   - ✓ Develop a clear message that we all share and make it a priority to get this message out (Goal 13)
   - ✓ Share skills and experience exchange information between field programs (Goal 6 incorporate conservation & development into all program)
   - ✓ New staff with the College can work closely with country programs to identify and document successes and lessons learned as well as to expand networks (Goal 11)
3. Supportive Board of Trustees
   - ✓ Expand Board from 7 to 9
   - ✓ Develop Trustee job descriptions
4. Upswing of interest in community development
   - ✓ Commission a external evaluation of our work
   - ✓ Identify indicators of community empowerment
   - ✓ Write the new book: Confronting Empire
   - ✓ Identify where the upswing of interest is occurring
5. Approach based on scholarship
   - ✓ Prepare scholarly publications (books & articles)
   - ✓ Prepare presentations for conferences and professional meetings
   - ✓ Support efforts to publicize books and ideas by staff using the SEED-SCALE methodology
   - ✓ Note in all materials that our approach is based on scholarship
   - ✓ Make key ideas and elements readily available in low cost, easily accessible vehicles (eg translate books into other languages, give publishing rights to organizations in other countries with country programs getting a % of the revenues)
   - ✓ Get Just and Lasting Change adopted as a textbook
   - ✓ Rigorous monitoring & evaluation will help/support field programs
   - ✓ Give priority to recruiting scholarly/academic staff (?)
   - ✓ Record both success and failure, learning and sharing lessons with the rest of the world.

VII. RESTRAINING FORCES

The top 7, in priority order (# of votes in brackets):
1. Tendency to add something new and different…some contribute…others are distractions [13]
   - tendency to pursue new projects in a rush….may not be in the best interest of program areas
   - concern about expanding into areas that we cannot handle instead of focusing on existing programs

- Too any projects and possibilities in the hopper….leads to lack of consistency, lack of follow through and followup…potential distortion of priorities
2. Lack of stable, predictable funding [13]
3. Belief that we are the most successful….lack of awareness of other worthwhile projects/organizations and concern about our ability to acknowledge that some of our efforts may fall short [11]
4. Lack of clear internal communications between/among staff and program areas. Need stronger internal communications & feedback. [10]
5. Moving from 'Mom & Pop' organization inspired and led by a creative and resourceful leader to an institutionalized and decentralized structure. Key subtheme (also linked to #5 above): Need to clearly work out how this decentralized structure is to function and communicate to all.[10]
6. Lack of people who can carry our message, work effectively with communities [8]
7. The race against time…running out of time to 'turn this boat around'…some conflict among staff [5]

VIII. ACTION ITEMS TO ADDRESS RESTRAINING FORCES (need to put in same order as Section VII above)
1. Internal communications
   - ✓ Staff orientation
   - ✓ Communication tools for staff in the field
   - ✓ Passive information system with "access as needed"
   - ✓ Define who needs what information, when, and who is responsible for communications
   - ✓ Develop communication procedures
   - ✓ Face-to-face staff meetings twice a year
2. Management out of the blue
   - ✓ Implement Work Plan process
   - ✓ Develop process for incubating new ideas and agreeing on new priority initiatives
     - o A screening mechanism (starting with Future Generations Mission Statement, goals etc)
     - o Participatory communication and group decision making
   - ✓ No new initiatives without resources ($s, staff time, space, capacity) and follow through
3. Lack of stable, predictable funding
   - ✓ Broaden donor base
   - ✓ Seek multi-year grants
   - ✓ Run Masters Program
   - ✓ Organize major fundraising events (eg concerts)
   - ✓ Provide ideas/expertise for other's programs (ie technical assistance as a source of revenue)
   NOTE: Dan'l and Fran to develop additional details here
4. Lack of people who can carry our message/work effectively with communities

- ✓ Develop new leaders through Masters Degree
- ✓ Create in-house training programs
- ✓ Have people apprentice with Carl
- ✓ Develop short term SEED-SCALE training
- ✓ Support global reunion of Carl's students (and use this as an opportunity to promote SEED-SCALE?)

5. Implementing decentralization
   - ✓ Define and understand what we mean by a decentralized organization
   - ✓ Define responsibilities and authorities of all staff
     - o Position descriptions for all jobs
     - o Annual work objectives
     - o Annual performance evaluation
     - o Identify and support professional development opportunities to support job responsibilities
   - ✓ Priority actions to support decentralization
     - o Develop clear channels of communication
     - o Develop a system and culture of sharing information
     - o Develop a regular flow of budget information
     - o Define how teamwork occurs within this decentralized structure
     - o Develop orientation training for all new staff

6. Belief that we are the most successful….lack of awareness of other worthwhile projects/organizations and concern about our ability to acknowledge that some of our efforts may fall short
   - ✓ Develop strong monitoring and evaluation systems
     - o Learn from mistakes/failures
     - o Support people/programs that "fail"
   - ✓ Identify organizations/programs we can learn from
   - ✓ Develop a database of Best Practices

****

Parking Lot
Develop mechanism to continue to get feedback from Masters program grads when they are in the field.

Separate communications planning meeting to deal with specifics of who needs what information/when/how