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Institute**

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**Initiating a Strategic Planning Process**

**A Report on Discussions**

**with**

**The Board of Directors and Selected Stakeholders**

**of**

**The Focusing Institute**

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For the Exclusive Use of  
TFI's Board of Directors and Managing Director

# “Initiating a Strategic Planning Process”

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# “Initiating a Strategic Planning Process”

## Introduction

TFI is at a crucial point in its existence. Its Founders are actively involved in the Institute, and the organization is embarking on a transition to assure its future beyond the direct influence of its Founders. TFI wants to determine through a strategic planning process how to be sustainable and resilient in that future.

This report presents observations and findings on strategic planning. A formal strategic plan is typically created by a group that has authority to speak for the organization. In this initial effort, a consultant can observe, synthesize, recommend and report. In order to create a formal strategic plan, the Board of TFI will define a process that proceeds with support from an agreed upon group of stakeholders. (In many cases where a strategic plan is imposed on an organization from an outside source, the process of adopting that plan – generating commitment and action – is long, and often fruitless.) It is wise for the Board of TFI to start the process by collecting the issues, then using a collaborative process to determine the best method.

A number of resources were reviewed in the course of creating this report. These resources are included as appendices to this report and may be referenced in the creation of a complete strategic plan. These include the two vision statements (one long and one short), the diversity statement, the bylaws, and various reports prepared by board members.

## Broad Categories Needing Attention

What follows are high level categories useful for planning, and thoughts about where TFI might direct its efforts. The rest of this document is a longer discussion of the activities and choices TFI can make going forward with its strategic planning initiative.

- **Organization and Process** – TFI Founders and Board Members are very interested in transitioning from a Founder Organization to a forward-looking organizational structure that can handle all of the contingencies of management and operations, including a succession plan, appropriate support for all the people involved in TFI, and the right mix of expertise to carry out TFI’s business. TFI Founders and Board Members expressed a keen desire for TFI to be a truly collaborative organization. Time and care should be taken to hone the collaborative method so that it is effective for all aspects of TFI’s business.
- **Financial Management and Fund-Raising** – In the next 3-5 years, TFI should close any gaps between income and expenses, and build a fund for development of new projects, new business and staff. Support for the Founders is a key issue to be resolved in establishing a financial management plan. In order to accomplish financial goals, TFI needs to expand its base of income beyond the Focusing community. By thinking at the edge of the current population of donors, and combining strategies for bringing Focusing to larger populations, such as groups of all types and non-focusers, and providing for the retirement of the Gendlins, TFI can grow – mindfully and carefully – toward the accomplishment of more and more of the creative ideas for applying Focusing broadly.
- **Projects** – TFI is involved with a number of efforts that are attracting attention, volunteers, and funding. Finding the means to put the right amount of support and

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expertise around these efforts to sustain them and help them succeed is vital to TFI’s future success. For more on these areas, see “Strengths.”

- **Communication** – TFI Board members voiced a need to examine how TFI communicates, and a desire to formulate communication policy and practices to be as efficient and effective as possible. Members believe expertise is needed in marketing, social media, and presentation of TFI’s work around the world, to name a few areas.
- **Planning** – TFI needs a plan and the data and documentation to back it up to support its long-term goals. Board members expressed concern with the extent to which TFI is reactive rather than planful, given the overload of key people. Most members have noticed that gaps open up when the staff is overstretched and expressed the desire to have a more prioritized approach to TFI’s business.

### A “SWOT” Organizational Assessment Approach

There are many equally effective methods to assess organizational “health.” Several of them have informed this engagement. One popular method looks at strengths and weaknesses of, opportunities available to, and threats to the organization. The rest of this report, as an example, looks at the “SWOT” profile of TFI. These points were illuminated by interviews with Board members and selected stakeholders. (See Interview Schedules in Appendices)

#### **Strengths**

One great strength of TFI is the core practice of Focusing, the many forms in which it is taught, and the many fields with which it can be combined. Focusing applies to so many areas that it is analogous to literacy. Just as leaders around the world desire literacy for their entire populations, the Gendlins have given Focusing to the world, which is to carrying life forward as literacy is to communication and learning.

Because Focusing can literally be applied to almost anything to make it better, anyone who learns Focusing can discern a new way in which it can be applied. This is both the great strength of Focusing and a considerable threat to the sustainability of TFI. What follows are some of the ways in which Focusing can be applied that have attracted considerable energy recently and constitute the areas where TFI can build strength and engage funding quickly from a broad base of support.

Community Wellness - Also known as “psychosocial wellness,” a term that has more familiarity in certain arenas, this area of Focusing applied to groups and communities may be the fastest developing application of Focusing, and the one that is the most likely to attract current donor funds. Right now, important efforts in community wellness are taking place around the globe, including in Afghanistan, Pakistan, Ecuador, the Dominican Republic, El Salvador, Gaza, Nepal, and in areas like addiction recovery (Costa Rico), NGO management (Ecuador), and conflict resolution (various), among others. A Retreat at Asilomar in connection with the 2011 International Focusing Conference will put the spotlight on a large number of efforts to move community wellness forward and provide an addendum to this report about those promising efforts.

Focusing with Children - A discussion group with world-wide membership and a group meeting virtually via conference call keep interested members up to date on developments in Children Focusing. The “Sparkling Energy” International Children Focusing

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Conference in the Netherlands in 2010 was a widely acclaimed gathering to promote work in this area. The publication of Simon Kilner’s “Helping Children with Focusing Some Guidelines for Companions,” Marta Stapert and Erik Verliefde’s book “Focusing with Children - The art of communicating with children at school and at home,” the publication of stories about Children Focusing in the past few years, and recently initiated efforts to update the Children Focusing section of the website are some of the efforts to keep members abreast of efforts in this area. Reports are surfacing on several efforts in individual schools. Logical next steps might include more exposure of Focusing to teachers’ associations. (For more in introducing Focusing to associations see Appendix for “A Simple Design”)

Beyond these, there is interest in so many areas that a simple list is already beyond the scope of a small staff to track, let alone support: (From “Focusing into...” at <http://focusing.org> ) Addictions, Body Work, Business, Creative Process, Expressive Arts Therapies, Medicine, Science, Spirituality, Trauma... to name a few that have not been named previously.

TFI’s people are its greatest asset. The Board is filled with lively and experienced focusers from a variety of backgrounds, each with a deep dedication to Focusing itself, to Gene and Mary Gendlin, and to the preservation of all for which TFI stands. The Staff of TFI are among the most dedicated imaginable, particularly the Managing Director. Melinda and Mitch Darer deserve special mention for the sacrifices they have made in their private lives to not only house TFI, but also to respond to its needs on a global (time zone) basis for so many years. TFI’s Webmaster, Bill Silverman, also deserves special mention for donating substantial time and foregoing market rates for his work on TFI’s website and related uses of technology over years.

### **Weaknesses**

The following issues emerged relating to key aspects of TFI and the accomplishment of its responsibilities in the reality in which it finds itself. This “reality concept” is essential to the strategic planning process. Some of the structures and processes TFI uses at this writing are based on assumptions from the past. In order to survive and thrive in the current reality, these assumptions need regular review and revision. The risk of no action in these areas may be a sustainability risk to the organization.

### **Founders**

1. TFI is a “Founder Organization.” The Founders are keenly interested in the next stage of the organizational lifecycle for TFI, in order to assure that their creations and hard work survive and thrive.
2. The Board, the Coordinators, and other key stakeholders share the keen interest of the Founders in the sustainability of TFI after the Gendlins are no longer actively involved.
3. Measures can be taken to assure that Gene Gendlin’s voice is heard into the foreseeable future. Something like a council of scholars will be needed as a “succession plan for Gene. He has already conceived some of the details and will benefit from support to complete the process.
4. Measures can be taken to assure that all of the results of Mary Gendlin’s diligence and dedication, most especially preserving diversity in teaching Focusing, and making TFI globally influential, are sustained into the foreseeable future. Discus-

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sions about supporting Mary and contingency coverage of her responsibilities as Executive Director have already begun.

### **International Outreach**

5. The international community of focusers experience TFI as less culturally sensitive than expected as Board members see it. This is the direct result of stretching scarce resources too thinly across a wealth of good ideas, and expecting that same pool of scarce resources to understand and apply many cultures, organizational systems and languages to the work of TFI. This is a “growing pain” that might be addressed first at the level of resource conservation – recognition of the limits of human capacity to manage burgeoning ideas and requests from around the globe. Secondly, something organizational can happen so that the needs of different countries, cultures, and language speakers can be met by a much larger pool of resources recruited from the cultural centers, and not entirely from the U.S. office of TFI.

### **Membership**

6. TFI’s impact may be more lightly felt abroad than it is in the U.S. Potential members may be discouraged from joining the organization when they cannot perceive the value that membership expense provides. From the perspective of U.S. potential members, TFI’s direction may be perceived as turning more toward overseas needs, and may be discouraging these potential members who might believe that their needs will be less well served by an “outwardly facing” organization.

### **Coordinator Relations**

7. The Coordinators are the wealth of TFI, with the skills, experience, and creativity to move Focusing into many more fields, spread Focusing among new and different populations, and continuously supply the world with new trainers.
8. The relationship between the Coordinators and TFI is in a dynamic kind of tension. The best results for the sustainability of TFI imply that immediate improvements are highly desirable. The core of this tension appears to be competition for a seemingly limited pool of clients to learn Focusing. By expanding the pool, there will likely be enough students to supply all the needs. By improving collaboration, TFI and the coordinators can work together smoothly to develop new markets and new methods. The question is “How?”

### **The Training Model**

9. Expanding access to teaching and experiencing Focusing may necessitate less classroom teaching and more experiential methods along the lines of work being done in community wellness projects. This will enable Focusing to become truly accessible to any member of any population. Blending this with a teaching model that provides income to an increasing population of trainers is an area for investigation and collaboration.
10. Examining the current model of certification for partnership proficiency, trainers, and coordinators is an on-going responsibility in need of fresh attention. Developing programs to allow members of organizations to bring Focusing into their workplace, and to encourage proficiency in listening or accompanying a non-focuser in a Focusing way are two areas of keen interest. Recognizing that anyone might want to learn Focusing, or be accompanied in a Focusing way, and want to achieve progressively higher levels of proficiency without having to enter a teach-

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ing track, opens opportunities to broaden offerings, expand outreach, and attract larger client populations. Evidence of the success of these approaches may already be available.

### **Organization and Process**

11. Dynamics exist within this organization which create tension, which wears on the staff and the Board in the execution of their duties. One example of this is the lack of clear roles and responsibilities as perceived by Board members and other stakeholders. See the section on “Decision Making” for more on this example. Clarity of roles and delineated responsibilities are critical to productivity and performance. Consequences of the lack include frustrating duplication of effort and reduced credibility from less effective responsiveness.
12. Matching the desired collaborative process to the realities of doing business in the current environment poses a key question to TFI’s leaders. As the collaborative process is now applied, some members interviewed expressed frustration with the apparent paralysis of progress in some areas. Paralysis does not necessarily imply frozen or completely rigid structures, but a slowing of natural movement that requires a major adjustment by the organism that is paralyzed and the organisms that are interdependent with it. TFI does not control all of the organizations with which it interacts in carrying out business. Matching pace with outside stakeholders – business partners, consultants, agencies and experts – is as essential to TFI’s survival as integrity with its mission and values.

### **Planning**

13. TFI has too few resources and too little resilience to tackle all the issues, ideas, projects and challenges spread out before it. New and different management methods are needed to bolster TFI’s resilience and responsiveness as a growing organization. This is a common problem in organizations where scholars, intellectuals and specialists found or create an organization. The myth that intelligence equates to specialized skill in any area yields a high risk to organizations that need professionals in various fields in order to survive and thrive. This issue can begin to be addressed when the various facets of management and related expertise are recognized, recruited and applied.
14. TFI has a tradition of identifying Spaceholders for topics that have synergies with Focusing. This is a useful concept to begin to explore a topic, but can become stale if “space” is held indefinitely. In order to develop these areas into strengths for TFI, a second complementary concept of “champion” or something similar is needed. A champion is someone who recruits other interest and moves them forward on a topic to design, plan and implement a program.

### **Needs of Staff**

15. There is a perceived need among Board members to create objectives that both inspire and put limits on the effort required to work for TFI, so that effective boundaries protect personnel from overwhelm, overwork, performance open to criticism and complaint.
16. The people who run TFI are stressed to their limits, and in many cases past their limits, by the lack of boundaries around their work and the lack of respect for their heroic efforts in continuing to bring Focusing into the world in accessible, diverse, and creative ways. This can be addressed with policies and practices

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around prioritization, and by assembling a team to support and assist in running the business, especially while this strategic transition is underway.

17. Extensive research strongly suggests that organizations succeed when they leverage the strengths of their leaders and staff. (Strength = talent + skill + experience.) TFI does not have the depth or breadth in its leaders or staff to be able to leverage strengths – staff are overburdened with many responsibilities, pointing to a need to fortify boundaries and better manage priorities.

### **Attracting and Retaining Talent**

18. TFI has a critical need to attract and retain talent in a number of areas, with a limited budget for compensation. Key to TFI’s future is the ability to creatively construct non-monetary compensation for volunteers to fill some positions at levels of responsibility that will meet TFI’s needs for credibility, continuity, compliance, and conservation of resources. At the same time, term limits can be set and followed, respecting the limits on human energy and effort.
19. The process of selecting structures and processes that will carry TFI forward needs all the expertise of its many stakeholders *and more* to succeed.
20. “What’s in it for me?” The vast majority of focusers have to do something to make a living. This impacts the availability of skilled and experienced volunteers, and often shows up as a need to be paid or otherwise compensated for what might preferably be a volunteer contribution.

### **Business Documentation**

21. The documents discussed in this section are the basis upon which TFI operates. Without clarity and agreement around what these documents should say, a strategic planning initiative on the part of TFI risks stalling in confusion. Strategic planning will be well begun with a review of TFI’s key documents.
  - a. Mission Statement (See below)
  - b. Vision: two versions: Short and Long. (See Appendices) – excellent resources to map to Mission, Values and other critical business documents
  - c. By-Laws – the current by-laws were developed when TFI was organized in the state of Illinois. They are out-dated and may not align well enough with current applicable law, regulation and reality.
  - d. Statement of Values of the Organization – TFI needs to create a publishable version for a number of reasons discussed in this report.
  - e. Strategic Plan – flowing from this initial effort to identify strengths, weaknesses, opportunities and threats, or using any of the many other models for assessing organizational states. (More information on models is available on request.)
  - f. Business Plan – Helps to set direction, communicate priorities, and validate sustainability. Required by certain fund-raising functions. (See Appendices for one template)
  - g. Risk Management Plan – often neglected but essential exercise to identify and address serious risks to the survival and well-being of the organization
  - h. Plan for Immediate Actions – Catalytic efforts like this planning phase initiation usually reveal a number of efforts that can easily yield substantial benefits with relative ease. (See “Low Hanging Fruit” in Appendices for a few examples)



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### **Opportunities**

Creativity is the key theme underscoring the opportunities available to TFI. There are many creative ways to supply the needs of TFI, its leaders, coordinators, trainers, certified partners and members. What is needed to unleash that creativity and open up those opportunities is much more careful attention to resource conservation. Time to think, plan, imagine, and foster is only available when priorities are managed and boundaries are respected. Commitment to action for the future of TFI is the purview of every stakeholder who believes that Focusing is a gift to the world that should be readily and steadily available.

Clarity of Purpose - In order to achieve a state where opportunities can be realized, TFI will have to establish a clear mission and purpose, re-engineer its organizational structure, transition from the current leadership to a new leadership model, consider carefully how to expand into and support international endeavors, strengthen domestic operation to a level that can realistically bear the current burden, recruit and retain an appropriate array of qualifications in those who work for the Institute, whether paid or unpaid, and provide career development opportunities for employees. In so doing, TFI will be able to work on more of the infrastructure areas that are attracting energy, including workshops and conferences, fund-raising, transforming the training model, and creating a vital new membership model. In turn, a stronger infrastructure will enable more effort in applying Focusing more vividly and more broadly.

Workshops and Conferences – This year’s 2<sup>nd</sup> Annual Focusing Oriented Therapists’ Conference organized by Joan Klagsbrun is an excellent example of the development of new possibilities in conferences and workshops. TFI’s Managing Director has energy in this area and is considering possibilities for workshops with various groups. The precedent of the International Focusing Conferences, which are organized by a different country each year, is applicable to other theme-based gatherings.

Fund-Raising - A new “Administrative Group on Resource Development” is being established to look at grants and projects that could attract specific funding. Headed by the expert on fund-raising who has been volunteering time to TFI, this effort has already attracted two or more members from the global Focusing community to work on a volunteer basis to develop new funding sources for TFI.

Transforming the Training Model – This is an area where discussion has occurred and where broader interest may exist in having a large scale impact by re-engineering the traditional training model of one-to-one to encompass teaching more groups. Coupled with the revenue-generating possibilities of training in partnership Focusing, this is an area that needs a champion.

Partnerships – [Redacted for confidentiality] ... an analysis of the needs of the Partnership Program and TFI has established the Partnership Proficiency Certification. Together these two activities have the potential to create a unified and marketable segment of TFI’s business if given timely and effective attention.

New customers - Creating new pools of candidates to learn Focusing, become trainers and become coordinators is an area of keen interest to Board members. To quote Gene, “Without losing our diversity, we need to ask Coordinators to arrange for new trainees to contact some organized pool of people and form some group to practice with, for example policemen, credit counselors, family court workers, nurses, any existing

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group. The trainee would have a pool of customers to draw from when certified, and would be accustomed to thinking in terms of organized groups, not just individuals.” Moving Focusing into organizations is a simple, although not easy, way to broaden the reach of Focusing. A simple design for one kind of next step in this direction is included in the Appendices.

Outreach - Social media is another answer to the question of broadening exposure to and interest in Focusing. TFI has recently obtained volunteer help in setting up a pilot social media site for the FISS, which can be an example of how to broaden interest in Focusing through social media. This situation is also a good example of the need for some unification in communication policy and practice. While there is freedom among members to set up as many Focusing websites and social media sites as they desire, TFI is best served if it’s “brand” is unambiguous. How to make this work in the blending of TFI’s nonprofit status with the for-profit status of many coordinators and trainers, while successfully expanding the pool of candidates and the reach of Focusing is rich material for a strong effort on TFI’s behalf by a functional committee with a mix of expertise.

Membership, Diversifying and Broadening – Interest has emerged in changing TFI’s fee structure. [Redacted for confidentiality] A valuable next step would be to report on the analogous structures in other regions and compare as much data as is available about trainings vs. memberships to determine how many and which viable models would be most effective.

Academic Interest in Focusing – More than one Board member discussed the academic connection to Focusing. Coming as it does from a background of academic studies in philosophy and psychology, Focusing does not seem to be as much on the course list as one might expect in U.S. universities. Focusing is taught in universities in Japan, for example. Academic research about Focusing that follows various developments in the field of psychology may not be as prevalent as it could be. While this engagement was underway, the editors of the Folio decided to make “Focusing and neuroscience” the topic of the next edition, providing an avenue by which to expand on the topic of academic interest in Focusing. How important this whole issue is to the future of TFI is an excellent topic for more targeted attention and gathering interested stakeholders together to consider merit and need.

### **Threats**

Threats to the organization come in many forms at this crucial period. Because of resource constraints, a number of areas considered crucial to robust organization management may not always receive enough attention in TFI. Roles and responsibilities for governance of TFI, operations management, financial management, risk management (including human resource, legal, financial, reputational, and technology risks), succession planning, recruitment (i.e., attraction and retention of all levels of people and expertise), funding, expansion, putting Focusing in front of all kinds of groups, and expanding international attention are key areas where more energy is needed than TFI has available.

TFI’s communications are so important to its global identity that the topic deserves separate attention. At times confusing and inconsistent, TFI’s communications are less than fully effective and do not always present focusing and TFI in the most desirable way. Even though solutions seem like they should leap out of the many, varied and seemingly ideal technologies available, the problem has persisted for some time. This is a re-

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source issue, and what is needed is more attention to the website, newsletter, and journal, coupled with a clear communication policy and associated practices. These can help make all internal and external communications as efficient and effective as possible, along with creative recruitment of people to supplement the regular staff. A Functional Whole could usefully form around this issue, and examples of other successful nonprofits could be leveraged.

### **TFI’s Mission**

A mission statement for the organization sets direction and communicates widely the purpose of TFI. Many members of the global Focusing community express the frustration of trying to describe what Focusing is in a way that is sufficiently short, yet piques the interest of those who are unacquainted with Focusing. It can be doubly hard to explain the purpose of TFI if one cannot easily explain the purpose of Focusing. A succinct mission statement takes into account not only the description of the core strength – Focusing – but also the objectives of the organization and the use of its resources.

The following two mission statements, on the website and in the By-Laws, and may not serve the future vision of TFI’s objectives as well as needed.

#### **Mission statement on the Website**

“TFI is a not-for-profit 501C3 organization founded in 1986. Its mission is to make Focusing available to the academic and scholarly communities and to the public at large. We are an international community. TFI received the Charlotte Buehler award from Division 32 of the American Psychological Association for our work in developing resources and training for psychotherapists and bringing self-help and community development skills to the public.”

#### **Mission statement in the By-Laws**

“The Purpose of TFI is educational mental health and the development of new models of social change and problem solving.

The organization will carry out its purpose by providing seminars, workshops, and classes. It will train teachers in the Focusing process so that many more people can benefit. It will conduct research pertinent to education and health care. It will publish the latest developments in Focusing as they relate to the fields of education, psychotherapy, preventative medicine, stress reduction, business, spirituality, and the creative arts. It will act as a resource center for persons using the Focusing technique and help connect people of various backgrounds in different parts of the globe.”

The mission statement of the current reality is more like this: “*The Focusing Institute exists for the worldwide dissemination of Focusing as a powerful tool for self understanding, the relief of suffering, and increasing peaceful co-existence across ethnic, gender and cultural divisions.*” (Excerpt from “Remarks by Melinda Darer at the International Focusing Conference,” June 2010) Clarifying the main purpose of TFI can help resolve other issues raised by Board Members about the ability of TFI to carry out its mission and can help those who work for TFI to prioritize their efforts. Some criticize mission statements when they are only read once and posted on walls for the sake of appearance. But a mission that informs the actions of the organization can be invaluable to the success of the group.

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### TFI’s Values

There are several principles that are valued by the leaders of TFI, as well as its members. As an organization, a prime example is the “diversity principle.” Although clearly explained on TFI’s website by Mary Gendlin, the diversity principle is not necessarily agreed upon by key leaders in the global Focusing community, nor recognized globally as a Value Statement of the organization. There are other values, such as the value of applying collaborative process, which TFI leaders and staff try to follow, but often find themselves reacting defensively due to work overload that is discussed throughout this report.

Many organizations find that clearly articulating and sharing the organization’s values is the first important step to consistently “walking their talk.” In an interesting twist of organizational dynamics, clarity around values can also contribute positively to managing risks. Each of the risks to TFI identified elsewhere in this report is actually the manifestation of a value needing to be applied to the work of TFI.

A very robust example of a set of organizational values, associated with an organizational “Bill of Rights,” is available from Resources for Human Development (discussed later in this report) at <http://rhd.org/RHDvalues.aspx> .

### Today’s Organization

TFI today has few staff and a complex organization of members. The Board of Directors has a diverse membership of dedicated professionals, yet cannot provide from within its members some of the professional expertise needed to run TFI.

The following categories of roles exist and interact, often very effectively; sometimes with role confusion and ineffectiveness.

Founders	Coordinators in Training
Board of Directors	Trainers
Officers	Trainers in Training
Staff	Functional Wholes/Committees
Volunteers	Proficients in Focusing Partnership
Paid specialists	Members
Certifying Coordinators	... and more

The job of tracking membership, maintaining the matrix of options, and responding to communications is often challenging. More clarity around roles and responsibilities is urgently needed, along with methods to acquire skills and experience to address the needs of the business of TFI.

### Perceived Roles and Functions

Role confusion is a prevalent theme in association with TFI. Little if any documentation exists to communicate the responsibilities, accountabilities, authority, qualifications or requirements of the various positions. Because some of the people in these positions have been acting in these capacities for some time, habitual behaviors and routine relationships carry forward in ways that need regular review and updating in order to be current, responsive, efficient and effective. Board members do not undergo regular orientation, and some expressed confusion because of differences in what they experience on other boards, what the by-laws state, the apparent practices, and gaps in communication.

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Stated antipathy for perceived corporate rigidities may have overlooked benefits of some effective practices.

### **Functional Wholes/Functional Committees**

Functional Wholes or Functional Committees are structures adopted to avoid the perceived rigidity and frozen structure of standard committees. Several discussions put attention on how to achieve outcomes given the way these groups are organized.

Helpful work in the literature of organizational development exists on virtual teams and could assist here. This literature discusses some of the ways teams are forming in the virtual age – showing them to be more transitory, with people coming in as needed or interested, similar to the suggested operation of TFI’s groups. There are ways to create team charters which could help manage both expectations and outcomes in TFI’s groups. As it is, the Functional Wholes have not entirely met expectations, and in some cases are not operating as efficiently as the business realities may demand. Being able to respond with agility to the reality in which TFI finds itself is an important business concept in support of TFI’s sustainability.

There are three Function Wholes or Functional Committees that were established in a recent Board action. A fourth one on finances, a very important charge, did not raise sufficient interest to form. How Functional Wholes are accountable and empowered needs to be clearer. How they interact with other Board initiatives and interests, as well as the business operations of TFI also needs attention and documentation. The notion that these groups can experiment with their own internal structure and process while at the same time holding responsibility for carrying forward specific business charters for TFI may need more work before it can succeed in practical use.

The Crossings Group is reported to have a structure and term of work that sounds effective. It may serve as a model for bringing other groups into effective functioning if further examination takes place:

- Works in a Focusing way to envision what they are doing
- Has a facilitator
- Individuals step up for discreet chores
- Fluid and voluntary around who does what

These are the three Functional Committees the Board established in April 2010:

1. Finance/Sustainability – how to make Focusing and TFI financially sustainable. This group did not form due to lack of volunteers.
2. Communications/Technical – changing the look and functionality of the website for a start
3. International – continuing to move towards a more internationally functioning organization.

The following Functional Committees are also mentioned.

- Coordinator Care - active
- Crossings Support Group – actively supporting the evolution of the TFI Weeklong.
- Functional Pool – people offering their services as potential resources for mediating and facilitating difficult situations within the larger Focusing Community.

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Coordinators also form groups to accomplish different purposes, such as running the Summer School or the International Focusing Conference. Communication challenges add to the existing challenges of managing outcomes and expectations. The whole situation would benefit from some reorganization to allow the small staff of TFI and the volunteers who staff these groups to operate as efficiently and effectively as possible. Managing volunteer frustration around these issues is in TFI’s best interests so that it can attract a larger base of volunteer talent.

### **Finances**

What follows is extracted from “Understanding TFI’s Finances” dated August 2010 and gives an overview of the distribution of income and expenses in four broad categories. Concerns expressed about TFI’s finances centered on three issues: support for the Founders, sound financial management practices, and expanding the donor base for fund-raising with professional help in order to assure continuity of income available to cover expenses. A full-time functional committee on finances and fund-raising is badly needed in the opinion of the Members. A lack of volunteers in this area indicates that the search for help will have to expand beyond Board membership.

Longer term, TFI needs a policy and plan to address the tension between the Founders’ desire to give away Focusing and much of the information about it that they create, and the need to earn money in order to survive as a nonprofit. TFI needs to make more money than it spends so that it can invest in developing its people, developing new ideas, addressing technology changes, and improving its infrastructure, some of which has been neglected or underfinanced for considerable time.

TFI also needs a plan so that it can develop new ways of rewarding innovation, encouraging engagement, and motivating a large base of volunteers it badly needs in order to meet its objectives and carry forward toward its vision. Volumes of ideas about how to motivate and reward are readily available. Scholarships are already awarded to people who could not otherwise participate in TFI’s programs. The Janet Klein Scholarship Fund is another way that a grateful family honors the passing of its dear member, a beloved Focusing teacher. Fellowships for members who are innovating in various fields are another way in which TFI can broadcast its interest in carrying Focusing forward.

The data offered below were provided to the Board as the start of an effort to track TFI’s finances, note trends, provide as much transparency as possible, and manage TFI’s finances based on sufficient safety and soundness.

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<b>Income</b>	<b>2010</b>	<b>2009</b>
Fees	\$ 167,667	\$ 136,900
Workshops	\$ 282,265	\$ 316,970
Donations	\$ 129,990	\$ 106,658
Other	\$ 48,329	\$ 84,350
Total Income	\$ 628,251	\$ 644,878
<b>Expense</b>		
Consulting	\$ 42,839	\$ 37,609
Workshops	\$ 180,400	\$ 183,731
Payroll	\$ 267,045	\$ 252,932
Other	\$ 115,335	\$ 119,618
Total Expense	\$ 605,619	\$ 593,890
Net Income	\$ 22,632	\$ 50,998

### Notes on Financial Data

#### Income

- Membership Fees
- Workshops and Conferences
- Donations
- Other (mainly bookstore)

#### Expenses

- Consulting
- Workshop & Conference Expenses
- Salaries
- Other (mainly office, utilities, etc.)

### Decision Making

Decision making in TFI rests with the Board according to the by-laws, but the Managing Director is the de-facto decision maker in much of the business. Her authority and support are not commensurate with her responsibility, and this takes a toll on her. Questions worth answering are:

- o How can we manage decision making so that there is better communication, more effective decisions, less duplication of effort, more transparency around precedent and policy, and felt-sensing as a group process, yet enough efficiency to manage business that way?
- o If we are not managing our business in a felt sensing way, what is that telling the rest of the world?

TFI has so many good ideas – this is both the blessing and curse of highly intelligent organizations. At the same time, TFI is not being as highly intelligent in managing its human resources as it could be, because of one or both of two management myths:

1. “People are self-managing.”
2. “An intelligent person can pick up what s/he needs to know to do ‘good enough management’.”

People are interdependent, and while they may have good self-management skills, they still need direction and a connection to the governance structure of the organization in order to function effectively, collaboratively, and in a coordinated way. There appears to be a temptation in some of the “self-management” discussion of TFI to assume that people can operate entirely effectively without this kind of connection.

The managing director and her staff deserve as much attention to their well-being and success as anyone would desire and expect from employment in any organization. Furthermore, plans for contingencies are an essential part of respecting the dignity of all

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staff – leaders and subordinates. To do any less than to provide coverage for illness and other incapacity expresses a lack of compassion and respect for the human beings in our care.

Everyone needs compassionate feedback, guidance, thought partners, shared responsibility, measured autonomy, recognition, praise, tools for success, and the prospect of advancement. Within the global Focusing community there are now enough focusers with business experience that TFI’s leaders can lean on these experts to strengthen their ability to run the organization. TFI needs new blood, both in the short term and the long term. As a first step, discussion is already underway about assembling a management team to support the Managing Director, made up of focusers with business expertise and some capacity to work short term without substantial compensation. Many Board members and stakeholders view this as absolutely essential to the sustainability of TFI’s immediate business.

### **Dynamic Tensions within TFI**

Various dynamic tensions seem to exist among stakeholders of TFI. These are just a few of the tensions detected during the interview process. The critical question is: Which ones require attention and mitigation, and which ones can exist as part of the natural state of any human organization? Those listed here clearly need attention and the underlying situations should be mitigated as soon as possible. The essential tension in each may continue to exist in some form, but “as is,” may pose a survival risk to TFI if allowed to persist much longer.

- The current Board structure of two tiers in tension with the desire of many to see a different structure that will accommodate TFI into a future full of big changes.
- Accounting for the rules of non-profits, the sources of funds, and responsible requesting, while maintaining cultural sensitivities [Redacted for confidentiality]
- Launching various fund-raising efforts like the spring letter, grant-writing team, and fund-raising engagement of the Board, yet being able to step back in some collaborative way and form a manageable strategy for funding the Institute.
- Supporting every possible manifestation of Focusing "and," while at the same time responsibly managing resources - people, money, time, energy, etc.
- Operating in defensive reaction mode much of the time, yet needing to take time for planning, creativity, individual professional development, and other activities providing longer-term benefits.

### **Need for Documentation**

What does it mean to be a stakeholder? Board Member? Coordinator? Trainer? Member? etc. How should TFI apply management and leadership concepts such as authority, accountability, responsibility, and autonomy? How can TFI communicate more effectively by tracking responses and managing who responds? These and other questions raised by Board members are the territory of organizational documentation. TFI needs to prepare documentation that will provide for continuous and consistent operations throughout transitions in leadership, and throughout TFI’s business cycles. Public versions of selected documentation can have significant beneficial effect on TFI’s ability to communicate with its stakeholders, especially as such documentation clarifies roles and helps manage expectations.



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### **Operational Risk**

Operational risk is an area of business planning that has gained increasing attention in the last decade – a period of time in which risks have seemed much more dramatic and compelling than ever before. To look at life through a lens of risk is not particularly compatible with the way most members of the global Focusing community want to be in the world. But for a business operating in the current reality of TFI, to completely ignore risk is a clear threat to survival.

Operational risk is usually evaluated across nine categories: environmental, financial, fraud, legal, people, physical, processes, reputation, and systems. Aspects of these risk categories are discussed in this report. It has already been noted that addressing risks is integrally linked to the values of any organization. Managing risks sensibly is one manifestation of a values-driven organization. A more comprehensive review of the risks posed to TFI by its operations in the reality in which it finds itself should be undertaken by the Board in the course of the current year.

### **Activity Audit**

In order to have a more accurate picture of the wealth of ideas, the actual current efforts and outcomes and the prospects for future investment, TFI may want to sponsor an “Activity Audit” illuminating where the energy of TFI and the global Focusing community is currently invested. The desired outcome is a distributable report that clearly and accurately describes TFI’s global impact in a way that is accessible not only to its membership, but to other stakeholders in TFI’s success: potential members, potential sponsors, and potential adopters of programs, to name a few. How might an activity audit be performed? Enlist “owners” of each dimension of TFI’s business and activities to briefly describe their efforts, and then compile the results in a report that might also be helpful, in part, as promotional material, and publishable on the website.

### **Clarifying the Role of Coordinators**

Coordinators represent great “wealth” to the global Focusing community and therefore of TFI. They are leaders and innovators, and yet Coordinators do not have the time or the mandate to run the business of TFI. At the same time, the Staff of TFI does not have the mandate to set the course, the vision – this belongs to the Board of Directors. Therefore, there is confusion, and in the confusion, there is discomfort, in some cases animosity, and the belief by some that the Coordinators have to compete with TFI for training clients.

The Coordinators are capable of setting direction, purpose, and quality measures, and this could be of great benefit to the global Focusing community. From TFI’s perspective, the strength of the organization has always been in enabling the vision and mission to become manifest. To this end, the question needs to be answered, “How can TFI benefit the most from the Coordinators’ efforts *and* give them enough of what they need?”

Service to TFI by experts with skills and experience in various fields is a key theme of this report. Enabling Coordinators to come forward to answer any call that interests them is one of the ideas that could enrich both TFI and the Coordinators in a more collaborative relationship. Expanding the pool of candidates to enter training as trainers and coordinators is an area that needs attention. Rates of growth in developing new trainers and coordinators among the certifying coordinators are the subject of at least one

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study. Some data suggests that not all Coordinators operate equally in their respective spaces. The percentage of coordinators who are currently training trainers may be in the range of 50-60 percent. What this implies may be a tiered approach to the Certifying Coordinator population. More trainees equates to more privileges. Fewer trainees, equates similarly to fewer privileges. Tier structure in fees is also appropriate. And recognition for alternative contributions is equally appropriate. What this implies for developing the entire coordinator population in the near term deserves careful study by a functional committee with clear, time framed objectives.

Communication among the Coordinators now is very informal, some treating organizational issues, some making requests of TFI. Overall, Board members expressed a sense that Coordinators have more to contribute to TFI, that communications could be clearer and more helpful going both ways, and that if resources were available, Coordinators would benefit from more support from TFI. On the other side of this “equation,” Coordinators could be a powerful force for the benefit of TFI. One example is the Partnership Program, which has prospects for generating both new students and revenue for Coordinators and TFI alike. A Functional committee of Coordinators could easily design a new program for Partnership Proficiency and Partnership Exchange to the benefit of everyone. This is just one example where Coordinators could serve both their individual interests in growth and benefit TFI’s on-going efforts.

Standards for teaching Focusing is another area where a dynamic tension exists that needs addressing. In the name of diversity, standards for teaching Focusing rest in the hands of each Coordinator. Yet in the reality in which TFI operates, there are many professionals who need applied teaching standards, learning programs and the like for such professional credentials as Continuing Education Units (CEUs). Coordinators are the experts who could easily design a resolution to this dilemma that would protect diversity while responding appropriately to the existing reality for professionals. The baseline qualifications for training can still allow for creativity at higher levels.

Lastly, limited success in bringing Focusing to more groups is a decades-old dilemma, national organizations and institutions being one of Gene’s long-standing targets. Coordinators are the population with the creativity, the expertise and the drive to design an “organizational Focusing” variation that could be offered. Along with a drive to put Focusing in front of more professionals already at work in group settings, such a design could make it possible for focusers embedded in organizations to conceive and implement “organizational Focusing” programs. Combining the principles of Focusing and community wellness, this idea could push Focusing past the “tipping point”<sup>1</sup> and toward ubiquity in the world as we know it. Put together with the idea mentioned elsewhere of teaching focusers how to accompany non-focusers, there is the potential for the broadest possible attraction and outreach for Focusing. (For more on one “organizational Focusing” approach, see “A Simple Design” in the Appendices.)

### **TFI as an International Organization – Thinking Freshly**

Many voices spoke of the desire to make TFI a truly international organization. While the desire for Focusing to be a worldwide asset is unambiguous, there is a dynamic tension between the needs and demands upon the domestic organization and the needs

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<sup>1</sup> Malcolm Gladwell’s moment when an idea goes from limited to “viral.”

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and demands of regions around the world. The resolution of this is not clear, but what is clear is the need for a new theory. As Gene says, “We know how to do this!”

What emerged from this engagement was a new view of “cultural sensitivity” as it manifests in the global Focusing community and through TFI. Board members from countries outside the U.S. as well as TFI leaders spoke eloquently about the strain of translation, the difficulties in managing the production of translated print materials, and the dynamic tension around soliciting contributions from a global community many of whom struggle to make a living and many of whom are not experiencing the benefits of TFI membership. Clearly TFI “thinks globally,” as the saying goes, and clearly TFI’s international coordinators “act locally,” to complete the thought. What is needed is the new theory about how to blend all the considerations and risks into a functioning international whole.

In considering the options, one design that was discussed provides a starting point for a discussion that deserves its own Functional Committee. The International Functional Committee may have this charge, and might benefit from a closer association with the Board and perhaps the addition of some outside expertise in forming international organizations from something like the SWOT perspective described above.

The design that came freshly was to consider TFI in three parts: an International Focusing Advisory Council, a Focusing Institute – USA, and Regional Focusing Institutes that are either country-specific or associated with collections of countries such as the Spanish-speaking Focusers, EU Focusers, Canadian Focusers, etc. This design addresses many of the current issues, a few of which are:

- Expanding to include selected Coordinators, Invitees, and other stakeholders in an official Focusing Institute group
- Giving more Coordinators official position and status
- Giving space for more invitees to participate in discussions of global issues
- Rationalizing the provision of services to the country in which they are rendered
- Strengthening regional organizations with expertise TFI could develop and provide
- Creation of more teachers world wide who are loyal to a Focusing institute (instead of losing them from the membership roles when the perceived value of a U.S. organization is too low compared to the cost)
- Providing options for hosting an international council on any desirable basis, including rotation

### **Examples of Excellence**

Learning lessons from TFI’s peers is an area in need of action. There are a number of organizations that can be contacted for advice, comparability, and support. What other organizations with similar missions does TFI admire? Is it possible to review their strategic plan(s)?

One such organization, Resources for Human Development, based in Philadelphia, PA, U.S., was interviewed for this report. RHD provides support to a large number of nonprofit organizations and is interested in pursuing a conversation with TFI about its needs and possible synergies with RHD. Typical support for a nonprofit can include accounting, legal, communications, and organization design services. The benefit of this kind of arrangement is the conservation of scarce resources which, like those at TFI,

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could best serve the development of new projects and programs if freed from two kinds of weakening activities: the drudgery of the routine and developing knowledge and expertise where outside expertise is much more effectively applied.

In another comparable organization, [Redacted for Confidentiality], a recent transition from one Executive leadership team to a new team seems to have occurred successfully. Part of the transition involved keeping the incumbent Director on the leadership team as the new Executive Director, and hiring a new Director from within the population of teachers of [Redacted for Confidentiality]. According to former Director, now Executive Director [Redacted for Confidentiality], this transition worked well because he had time to select and groom his successor. What [Redacted for Confidentiality] also said in an interview was that there were certain functions of management that were not his strengths. Although he was able to run the organization with minimum attention on these areas, he knew that a time would come when he should turn over the reins to someone else for the sake of the organization.

Lessons learned from comparable organizations can be invaluable to TFI’s ability to transition smoothly at any point in its development. As Eleanor Roosevelt said, “Learn from the mistakes of others. You can’t live long enough to make them all yourself.”

### **Inviting Feedback from Stakeholders**

There are many different ways to engage stakeholders in the organization in a feedback exercise that can lead not only to a more informed strategic plan, but also to more commitment to action and ownership of the organization’s objectives on the part of stakeholders. For example, engage the global Focusing community in an exercise to develop a “heat map” of interest in Focusing “and ...” around the world. Or, develop a plan to coordinate the efforts of various groups, all of which are moving forward plans to improve aspects of the delivery of Focusing to the world. Or, use methodology like “Future Search,” which was the basis for the “Questions on Strategic Planning” distributed to Board members at the outset of this engagement. The Future Search method, which relies on the principle of bringing the “whole system” into the “room,” means that all stakeholders in the organization are represented at the planning “table.” The outcomes are typically much faster accomplishment of the planning activity and much more committed stakeholders acting on the plan. These are just a few of many methods available to engage stakeholder interest and commitment.

### **Where TFI Might Want to Go – Next Steps**

This report synthesizes discussions with Board members and selected stakeholders. The Board has many options from which to choose in how to proceed with this planning exercise, but one thing is clear: it is time to act to support TFI’s Founders, its business, and its future. What follows is an outline which, combined with the rest of this report, allows TFI’s Board to move forward expeditiously with the next steps of this process.

- Who will create a formal strategic plan for TFI and how?
- What are sustainable governance and management models for TFI and how will these be implemented?
- What are the financial and fund-raising management models needed for the type of nonprofit TFI is, and how will these be implemented?

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- What business operation improvements does TFI need?
- What are the demands for expansion of TFI’s business? And what expansion is reasonable given resource constraints?
- What revisions to the By-laws are needed and how will that process proceed?
- How will relationship management with the global Focusing community be developed?
- What plans for incapacity and other contingencies are needed for TFI? How will these be implemented?
- What succession plan is needed for TFI? How will it be implemented?
- How will a technology management plan for TFI be developed and implemented?
- What communication policies and practices are needed and how will they be implemented?
- What are TFI's key initiatives for the planning period?
- What are the resource requirements of TFI's key initiatives for the planning period?
- Does TFI have resources to accomplish its key initiatives for planning period?
- Will the global Focusing community engage in TFI's key initiatives for the planning period?
- What additional support will be attracted to and retained for TFI?
- What is the dynamic between paid and volunteer support, and how will both elements be fairly and reasonably rewarded?
- What are the specializations that are required for TFI to accomplish its key initiatives for the planning period? Does TFI have access to these specializations?
- What further support does TFI’s website need and how will that be implemented?

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**Appendices to  
“Initiating a Strategic Planning Process”**

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**Appendix A – Interview Schedule with Board of Directors [Redacted for Confidentiality]**

**Appendix B – Interview Schedule with Selected Stakeholders [Redacted for Confidentiality]**



## **Appendix C – TFI Diversity Statement**

Focusing is a practice that honors what arises freshly in the moment. Frozen structures of any kind are antithetical to the ethic of Focusing. Therefore, the Focusing Institute takes as a core value the principle that the practice of Focusing, how it is taught by certified Focusing teachers, and its application in different fields will not be standardized. Diversity of approaches will be protected. Constructive critiques among Focusing Trainers or between TFI and individuals presenting or applying Focusing are welcome and should be offered by means of open, respectful communication. TFI itself will seek to honor the values of non-standardization in its operations while recognizing that tension can arise between maximum diversity and the need for effectiveness and efficiency in meeting its goals.

## **Appendix D – Vision Statement for Focusing ~ Short Form**

TFI will have achieved its purpose when:

A substantial proportion of populations in all countries and cultures and social classes know how to focus for themselves and/or in Focusing Partnerships which are free of charge. This is like felt-meaning-making literacy as a goal for the world.

Focusing-Oriented Psychotherapy is recognized as a major process in psychotherapy, taught in all countries, in University and professional training programs.

The Philosophy of the Implicit is recognized by intellectuals in all countries as the paradigm shift for our age (After Post Modernism).

Professionals in academic and scientific fields use Thinking At The Edge (TAE) to create first person variables and processes in their fields.

Ordinary people use TAE to think for themselves and assess their situations and values.

Focusing and Focusing Partnerships and CHANGES groups are used in conflict situations at all levels as a recognized peace making and community development activity.

Applications of Focusing (Politics, Development, Social Change, Medicine, Children, Sports, Business, Creative Writing, western contemplative practice etc.) have an infrastructure of information and teachers which supports their development and accessibility.

Focusing is woven into the societal fabric world wide enough so that there is no longer a need for any central international organization. Like literacy is becoming today. A basic life skill wanted and taught at all levels in all countries. This will help change the nature of interpersonal relating, social structure and government.

## **Appendix E – Vision Statement for Focusing ~ Long Form**

### **ACTION STEPS AND PROJECTS**

Eugene T. Gendlin, Ph.D.

In this overview I propose actions that any of us could undertake, and I present some of the possibilities that are asking to be done. I hope readers might want to pursue some of them.

First I try to say what it is that enables Focusing to make a vital contribution to so many very different fields. Then I urge you to form small groups of people working on a project, or on similar projects. I discuss the need to contact and collaborate with other organizations. Finally, I sketch a range of projects that are ready and waiting for someone who wants to get them rolling.

#### **1. THE CENTRAL FACTOR IN APPLYING FOCUSING IN MANY FIELDS**

In many fields there are constructive organizations that aim to create beneficial change in people. Such change usually happens only at a deeper level of inward attention. Most organizations don't know how to contact that level in people. Their main aim is often defeated because of this lack. Focusing reaches “there” in people, where what each field aims at can actually happen. That is why Focusing is a crucial addition in so many fields.

Because Focusing comes from a new philosophy, it enables a fundamentally different way of doing almost any activity. Focusing provides access to the experiential intricacy of one's situation, which generates new possibilities for carrying life forward. It also makes for empathic attitudes towards oneself and others and all forms of life. So it makes the world a better place. But here I want to emphasize how Focusing leads to developing a precise way for achieving the purpose inherent in many fields. I can formulate this best with examples.

For example: Everyone who works with schools would like the children to discover the excitement of thinking, learning and curiosity, but it hasn't been known “where” that discovery happens in a child, and how to enable a child to attend there. We have specific researched instructions for reaching that level in a child.

Everyone would like the jails to rehabilitate people but it has not been known how to bring a person's attention there where that desire and ability can come. We have careful quantitative research showing that when violent prisoners have learned Focusing, recidivism decreases. As one domestic violence inmate said, “I have become a person who does care about the damage I have done.” The prisoners report that now, when they get angry, rather than blowing up and acting out always in the same way, they go inside to see what exactly it is, that is making them angry. And, they say “Each time it's different!” (Bierman, [http://www.focusing.org/rwv/alt\\_versions/Relating-Without-Violence.pdf](http://www.focusing.org/rwv/alt_versions/Relating-Without-Violence.pdf) .)

Stress reduction (widely used in business) is more effective when problems are found one by one, and finding where they are carried in the body. We set each problem “at the right distance” (where we can still feel it but it doesn't overwhelm us), and check in the body whether the physical tension-relief has really happened there, or not. If not, there are more steps that can be taken. This is what we call “Clearing A Space,” the first step in Focusing. It happens to be a much more effective mode of stress reduction than the usual way of shifting one's attention away from everything at once, and without finding where problems are carried in the body.

With cancer patients we have several research findings showing that “Clearing A Space” significantly decreases depression and generates a better relationship to one's body. A clear space provides some hours of a physical well being which these patients have usually not experienced since they fell ill. Focusing reaches where such a life forward process can be found.

A recent book on sports tells athletes to “leave your problems in the locker room.” It's clear that you will perform much better if you do. But the sports field knows nothing further about how to do that, let alone specific instructions.

These examples are intended to pinpoint the central factor: To reach the place in the person where the organization's purpose can actually happen.

## 2. PROJECT GROUPS: A NEXT STAGE OF DEVELOPMENT

The Focusing Community is quite widespread. We have 1400 members and 4000 interested people in our database, about half in the U.S. and half all over the world. Many of them are therapists, but many others are working with applications of Focusing in various fields.

People who apply Focusing in a field are typically the only ones in their organization who know Focusing. They tend to remain the only one because it is difficult to instruct one's colleagues, and to explain Focusing without creating the experience of it. So they each remain an isolated individual in their organization. Each has developed an application of Focusing to deepen the main activity in their field, but by themselves they are usually not training others and creating a model that can be widely used.

Many are working in the same field but don't know each other and are unaware of what other field-specific techniques focusers in their field have created. There is some exciting group activity and people are sharing what they are doing in some fields, but not yet in most.

We can also hope that out of the work will come a model, a program that is actually adopted by one agency or in one school, church, or hospital - which if successful, would be adopted by many others.

Dear reader, you can bring two or three of our people together either in one location or internationally. If you like, the Focusing Institute can offer web channels, resources, and collaboration in designing a project.

We now offer a monthly channel through which you can ask our 4000 who among them might want to work, communicate with you on a project. These connections provide a way for those working in some one field to find each other, and consider working together. We don't promise to send every message, but we will try to do so. (Send us up to four lines.)

Forming many small groups to work together is clearly a next development we need. In most cases this is just now developing.

### 3. CONTACTING NATIONAL ORGANIZATIONS

In every field there are national organizations to which local organizations belong. Our people tend not to communicate with these organizations and do not present their innovation there. At most they tell the Focusing Institute about it. As lone individuals they do not have the channels, the energy, and the confidence to make contact with national organizations that would want to hear about an innovation. Conversely, they would hear of the latest developments in that field.

In many fields we have major Focusing contributions and new books (here and in other countries). Some of those we know are listed on our web page. But our diverse contributions in the same field have not been connected. There is also as yet, no way to call national attention to these contributions. Major results could be achieved with a little coordination.

We have a great deal of serious quantitative research (see our web page [www.focusing.org](http://www.focusing.org)) and do not need more to show the effectiveness of Focusing. We have a uniquely developed quantitative methodology for measuring first person processes by third person observational indices. What is lacking is attention to the research results by the relevant agencies in the various fields.

If some fociers in a field will work in a group, they will also become able to contact the national organizations.

### 4. OUR NEIGHBORS

There are now a great many organizations featuring processes that further develop human beings in various ways. I call these organizations "our neighbors." What they teach would be done more effectively in a Focusing way.

But we also need what they teach. We need to develop our bodies, our somatic energy network, our action skills, our interpersonal relations, our ways of handling conflict, how

we are being in this amazing universe, to name just a few of the many human dimensions some of which we lack.

Without the other dimensions, Focusing can become a pitfall. The process is so powerful and does so much that one can easily believe it can do everything. I have argued for thirty years “Look, it can't do everything. It can't open cans. You need a can opener.” Focusing doesn't develop action skills. If you have those already, Focusing will vastly improve them, but it can't do that if you don't easily take action. If you know about energy, Focusing will guide it in an irreplaceable way, but Focusing can't do that if you don't know about energy. And so on!

The best way to contact our neighbors is with an interest in what they teach. Each group works hard to teach their discovery - and avoids being swamped by everything else that is being taught. So they don't want to hear from us. But if some of us want to learn from them, they will take time to work with us.

When we know more than one method, then what we know doesn't remain separate. Anything one knows modifies how one does everything else. If we consider a method experientially, the organism doesn't drop what it already knows. It takes only new recognitions. We develop a more effective version of every method we use. And yes, Focusing does make for an especially more effective version of every other method, because of where Focusing reaches in people.

As an individual, one cannot easily teach Focusing to one's own organization. If there is a sub-group who knows both methods, that group can make itself known to the others, and can teach their more effective version to those who want to see, learn, understand it. That would be a way to bring Focusing to our neighbors.

But there are already many Focusing people in these organizations. The problem is that they don't know each other as focusers. We always “wear the hat” that is appropriate to the place we are in. So you might have to ask our 4000 people data base to find the other focusers in an organization to which you already belong. But that can be done.

There is an enormously exciting development of the human being happening in the world. We can provide a deeper level at its very center, but only if we get together with our neighbors.

Currently each discovery is separate and isolated. The development is not yet conscious of itself. The world will change when we all become aware of ourselves as a new social development, like the towns that developed during the middle ages and brought the modern world.

## 5. OUR COLLABORATIVE MODEL

The collaboration: We have an effective model of collaboration with other agencies. We provide Focusing Training for some of their staff. The project is carried out by that agency.

Each field has its own culture and known ways. The work need never be attempted by people who are unfamiliar with a setting. The Focusing Institute by itself cannot develop specialized teachers for schools, trauma workers in foreign countries, medical counselors, nurses, or people knowledgeable about business. The specialized trainings are created when we teach Focusing to some staff members of an organization in that field. They know the field in which they work. They are experienced in that setting. And, they are not lone individuals but staff members of an organization in that field - and now they are also Focusing trainers.

For example, our Afghanistan project is collaboration with the American Friends Service. Some portions of the project were funded by UNIFEM. Dr. Omidian, the head of the team is a staff member of AFSC who was trained in Focusing by our Ann Weiser and Nina Joy Lawrence. Now she is jointly a Focusing Trainer and the field representative for the Quakers. She is a medical anthropologist. AFSC provides the physical space, a salary for Dr. Omidian, and contacts.

Our team trains indigenous people – aid workers, student interns – who in turn teach Focusing in the villages. To date, some thousands of Afghans have learned, and in turn are teaching Focusing. Some of those particularly good at teaching Focusing are now Certified Focusing Trainers and participate in an International community of other Focusing Trainers. A similar project is going on in El Salvador.

Two members of the Afghanistan training team presented at an international conference in Jordan, and have now been invited to design programs in Pakistan, Indonesia, Rwanda, Lebanon, Gaza Strip, and Northern Iraq. Now we will look for funding to build on these promising possibilities.

A team of our trainers has been coming to Romania and Hungary for many years. They teach psychologists, care givers in orphanages, and others. The head of the team, Marta Stapert, from the Netherlands, has been awarded the Knight's Cross of Merit by the President of Hungary, and was specifically lauded for “not just coming in and leaving, but staying with the program to really train Hungarians so that the team is no longer needed.” Again a number of gifted Hungarian Focusing teachers have been certified by the Focusing Institute and participate in the International community of Focusing teachers.

In this collaborative model we contribute just what only we can do: a) focusing training, b) designing the projects, c) providing resource and training materials, and d) helping projects stay on course.

Our functions:

- a) We have hundreds of Certified Trainers all over the world. Our Focusing Training can also include the partnership process and TAE for articulating and innovative thinking.
- b) The project design aims at integrating Focusing into the most advanced work in a field. We regularly find that this involves working with characteristic detail of that field on a level of great specificity.
- c) Of course we have a great deal of Focusing material. In some fields we have also accumulated applications that a person working in that field would profit from seeing.
- d) Maintaining continuous contact between the individuals and with us, as well as with the other agency is not easy as long as working together is not a habitual mode. Eventually a project group would have its own director.

Funding for individual projects: Once a pilot project succeeds, funding can be applied for jointly, by the Focusing Institute and the collaborating agency. We need not convince a funding source on the basis of our voice alone. The joint approach should make funding for individual projects more likely.

Project design and redesign: We design the project together with people from the given field. This is a sensitive process that takes time. We keep close tabs on the project, provide resources, and meet difficulties together. If a first pilot project fails, we and those who carried it out redesign it together.

Each of our projects is a model. If it fails in the pilot stage we redesign it, but if it is successful at that stage then the design and results can be widely distributed and adopted. The projects we design have the effect of centrally recreating how the main process in that field is understood and done.

In each case the “central” spot is how to reach “there” in a person where the desired result can actually happen. Although the philosophy and basic training are the same across fields, each project has to be a collaborative product between us and people in the field. The result will be a precise new Focusing-identified process in that field.

## 6. CONCLUSION

Returning to my opening theme, why can so many different activities be done in new more effective ways with Focusing? I hope many people will articulate this. I think it is because we don't have to stay with separate items, give them artificial connections, then try to impose the result on ourselves. The implicit, murky at first, soon opens into so much more, all already interrelated from underneath, genuinely – even embarrassingly real. The implicit ranges down into the universe where life flows up, and moves forward into little steps of “Oh ...” and Hmm...” which have the person's unique intricacy and flavor. The steps come from directly sensing the edge of what is right there but implicit.

Please don't spend years under the impression that Focusing is all one needs. We need to learn many methods for developing ourselves along many dimensions. Instructions for these methods succeed when we carry them out at that edge, "there." Then we soon have new specifications to contribute to that method.

The cultures seem to know nothing about the unique person and this level of sensing into any large or small thing. But now a world is forming, in which so much of the human person will no longer be left unseen, in which we treat each other and ourselves so much better because we feel-understand the implicit sense we make, and we will be understood when we undertake things from there.

This isn't something one person can state. If you feel something of this sort, please work to think and say it more and more.

Thank you.

#### POSSIBLE PROJECTS:

Just a few. Vastly more is being done than I could ever keep track of, and that makes me very happy. I can't possibly mention all the promising work that is going on. (See [www.focusing.org](http://www.focusing.org).) These are just samples. We assume you will do in your own way precisely what you find most valuable.

A great range of promising projects are begging to be carried further. They would almost certainly be funded individually, once they are more developed.

**VARIOUS SERVICES FOR USE BY ANY ORGANIZATION** Authentic entry: Many "Changes Groups" have continued for years, but only in a few countries have they been used as a model. We know how to improve any kind of meeting by providing Focusing instructions.

Break-out groups service: Providing a structured hour for breaking into small groups for Focusing and Listening.

**INSTITUTIONS WHERE FOCUSING COULD BE BUILT IN** Churches Hospitals Jails Schools ...many others

#### APPLICATIONS TO SPECIAL POPULATIONS

Adolescents: We observe (although we have no research, yet) that Focusing can often be used by populations generally considered to be difficult (and also not very verbal). This includes inner city children. No lengthy instructions are required for them, just point at the chest and stomach and ask, "What comes for you in here when you say that?"



Elderly: A method combining Focusing and Caring Touch has worked well in old age homes. We have a training manual for aides. There is a research finding that Focusing increases longevity.

Alcoholics (AA): Many individuals report that several of the 12 steps are enhanced with Focusing. Some have integrated Focusing into the specific 12 steps.

“Borderline”: So-called “borderline” patients have been “difficult” to work with, but we find that many of them can immediately use Focusing and Listening. This is the case also with inner city children and adolescents.

Cancer patients: “Clearing a space” with cancer patients significantly lowers depression (and may have significant medical effects).

Children: In class the children pay better attention when they have a clear sensorium gotten from Clearing A Space. That includes the “Focusing Attitude,” being friendly with one's feelings about each problem. One child said “I wrapped my problem in a blanket.” Some teachers use Clearing A Space to start the class. The kids look forward to it. It may improve grades and reduce disruptive behavior. (See The Children's Corner on the web page, which lists three international conferences, books, and articles.)

Dialogue groups: Bohm's “Dialogue” groups (and others) tell people to consult their “kinaesthetic” sense before speaking, so that discussions will not stay on the surface. But it has not been known what this really means or how to reach “there.” The head of one such group tells me, “They just stay in their heads.”

Doctors: A recent book by Barry Bub presents Focusing and Listening for use by physicians for themselves.

Hospices: For many years, Focusing and Listening have been very helpful to the dying.

Infants: Zack Boukydis has articles and films dealing with this area.

Trauma: A network of aboriginal people in Canada for victims of early abuse.

## APPLICATIONS TO VARIOUS FIELDS

Art: An architect in Austria writes: “Today art is individualists but people don't know what a human individual is. To design a building they take little motifs from other buildings and combine them. I ask students to get a felt sense of one of their favorite buildings, then design a totally new building from that felt sense.”

Bodywork: Better results have been observed when people do Focusing inside during the hands-on work on the outside. Alternatively, some workers have found that after a pause for Focusing the body work goes deeper. (We have no research on this as yet.) Focusing

has been integrated into a number of methods. (A group and several individuals, relating to the Alexander Technique, Hakomi, and many others; two international conferences).

Business: Focusing has been employed for creativity, decision-making, more productive meetings, better workplace relations, discovering new possibilities.

Dialogue: Several “dialogue” movements emphasize “tapping into tacit knowledge” and “kinesthetic sensing” before speaking, so that meetings can consist of more than surface arguments. The originator of one of these says “but most people stay in their heads.” We have specific instructions for what is intended.

Dreams: See “Let Your Body Interpret Your Dreams” on our web page. Also dream groups.

Energy work: The relation between Focusing and various energy procedures is currently being explored by a number of people.

Community and psychosocial work: Our Afghanistan project, now also in Pakistan.

Medicine: Focusing helps reach psychosomatic effects in a person, and the place where holistic healing can happen. Among many research findings, Focusing improves the immune system.

In Europe some HMOS provide Focusing training as prevention. It costs little and saves them a lot of money and time.

Our pattern of Focusing partnerships is also promising in this regard. Medical schools are widely reexamining their training to relieve the terrible pressure, but the “clearing a space” way of relieving it isn't yet known there.

Meditation: We have a long line of successive writings showing that Focusing deepens meditation and prevents various unintended pitfalls of meditation.

Psychotherapy: Referrals to Focusing-Oriented therapists. Gendlin, E., Focusing-Oriented Psychotherapy, Chapter 11 deals with integrating the different avenues of therapy.

Reproductive rights: Enabling women to articulate their voice in this field

Spirituality: Buddhist, Catholic Biospirituality, Jewish Renewal, Quakers, Sufis

Sports: A major recent book on “psychological skills” in sports tells players to “leave your problems in the locker room.” It is known that this idea helps, but no specific instructions for how to actually do it are provided. We have them. There is a great demand, but it is not yet well known that specific and tested training for this exists.

Stress reduction: The first step in Focusing “making a space” sorts, one by one, the problems the body is carrying (each time sensing whether something has released in the body, and what to do if it has not.) This process has superior results when added to the usual stress reduction methods.

Thinking: TAE “Thinking at the Edge”: Specific steps for articulating what cannot currently be said in the existing public language. A little-known use of language directly from Focusing comes with new phrases that can say (the meaning) differently. Sometimes these phrases can also become precise, logically connected new theoretical concepts.

Writing: See Sondra Perl's book *Felt Sense: Writing with the Body*, with precise instructions and a CD.

**Appendix F – By-Laws of The Focusing Institute [Redacted for Confidentiality]**

## **Appendix G – A Simple Design**

### **Opening the Door for Focusing to Find its Place in Institutions and National Organizations, by Barbara Joanne Dickinson**

In his article, "Vision Statement for Focusing: Action Steps and Projects," (February 8, 2011) Dr. Gendlin talks about "the need to contact and collaborate with other organizations." This theme repeats in our focusing community, yet there is a sense that we are not succeeding as we somehow "should."

How do we bring focusing to "institutions and national organizations"? There is something forming - vague and fuzzy - about what's missing in between "teaching focusing" and "focusing in organizations."

I come from a business background of several decades. In my experience, organizations and institutions, by which I mean systems like schools and jails, groups like associations and agencies, and businesses like companies and corporations, don't embrace methodologies unless they perceive in them the solution to critical problems. Coming as we do from the outside of any national organization or institution, how do we "package" focusing so that it addresses critical problems, if we do not know their problems?

What I do know is that I learned focusing while I was on the management team of a very larger federal organization, and it was immediately obvious to me how focusing changed the nature of meetings and decisions, and how thinking at the edge could unleash the creativity that feeds innovation. As an "embedded focuser," it was easy for me to see, from the inside, how focusing mattered to my organization, and how it could be applied in many ways.

Examining current examples of focusing within organizations strongly suggests that embedded focusers bring focusing into their organization, much as William Hernandez has done in Ecuador. Carrying this observation forward, the question becomes, "How do we create more embedded focusers?"

Can we expand what Dr. Gendlin says we do best, i.e., ".. a) focusing training, b) designing the projects, c) providing resource and training materials, and d) helping projects stay on course..." so that we include the steps that would help us place more trained focusers *inside* organizations, institutions, and systems? Perhaps this is simply training a lot more focusers than we already do. But it may also imply creating a new way of teaching "organizational focusing" – inspired by our own principle of diversity.

Can we then add a step to those listed above, so that we provide training to focusers in how to teach the group focusing process like the one in use in Ecuador? What if we could change the world one meeting at a time by making focusing as ubiquitous in group settings as literacy is in schools? In order to do this, we need our strongest teachers – our Coordinators – to embrace "organizational focusing" as a specialty and begin to work immediately to develop the methods to teach it.

This proposition rests on an important principle of strength-based productivity. Research shows that people are most productive when they are working in the areas of their strengths. We focusers are no different. When we knock on the doors of national organizations and institutions and try to convince those inside that we have something useful, we are not doing what we do best. When we teach focusing in many different ways, we are leveraging what we do best – our strength in teaching.

To expand the base of embedded focusers, we need to target the most effective and productive pathways to put focusing in front of individuals who are members of organizations. Our strengths include showing people how focusing is useful to them. We can take a first step in the right direction by collecting a list of target institutions and national organizations. Then, a focuser with an interest in one of these organizations can easily identify the date and location of the annual convention of that group. One or two focusers from the area local to that convention can be recruited to attend the convention, staffing a table in the Exhibit Hall of the convention with relevant focusing and TFI materials. This would put focusing training in front of a much larger audience than we have heretofore attracted through distributions among our members.

Once we begin to attract new students of focusing through this campaign for national organizations and institutions, we will begin to see more embedded focusers and more requests for the application of focusing within their groups. It will be imperative to have public offering of “organizational focusing” available through our web site and our trainers.

A second step might be to create a list of universities where focusing could be offered by Counseling Services or even Residence Life on campus. It is easy to see how focusing could again be “packaged” to address any number of needs of graduate and undergraduate students. Again, focusing trainers local to these institutions could be enlisted to make campus visits, perhaps coincident with Fairs or other events, offering focusing training through on-campus demos and workshops. Once these new focusing university graduates move out into their professional lives, the base of embedded focusers could expand exponentially, and the demand for “organizational focusing” will have to be met by more and more trainers in that specialty area.

With these two steps, and the development of a coherent “organizational focusing” training specialty, the door is open for focusing to find its place in national organizations, institutions, and society as a whole.

## **Appendix H – Melinda Darer’s Notes at the International June 2010**

The Focusing Institute exists for the worldwide dissemination of Focusing as a powerful tool for self understanding, the relief of suffering and increasing peaceful co-existence across ethnic, gender and culture divisions.

The Focusing Institute was founded in 1986 as a not-for-profit organization whose purpose is to help make focusing and the philosophy available to the public and to the international scholarly community through teaching, research and written materials.

TFI supports the ongoing work of Focusing’s founder, Eugene Gendlin, one of the major philosophical and psychological thinkers of his generation.

TFI also collects and distributes materials produced by a second generation of teachers, writers and thinkers on Focusing and the philosophy of the implicit and their applications in many fields.

TFI has a membership of more than 1700 members from 42 countries. We certify and support a network of about 800 Focusing Trainers and Focusing-Oriented Therapists who are trained by an international faculty of 164 Certifying Coordinators and Coordinators-in-Training. We carry out these functions by building infrastructure for circulation, training and interaction.

Being a member of The Focusing Institute is an excellent way of staying connected to the international focusing community and the latest developments. The Institute is a supportive matrix whose purpose is to help the human community integrate Focusing into its many ways of living and working, and to see to the continued thriving and evolution of Focusing and Focusing teaching.

We organize what has already been done so that people have access to it, and we make links between people who need to know about each other. We support a thriving philosophical community centered around the Philosophy of the Implicit. We generate continued Focusing research. There has been an unbroken developmental process for 35 years to bring us to this point.

To bring Focusing to people requires reaching out on many levels: training, publicity; archiving resources; bringing focusing into schools, medicine, churches, businesses and other areas. Membership is a way to support our work.

Today TFI is in a transitional organization phase, and where we have both the need and the opportunity to create new forms of organization in TFI.

Today we are in a transitional organization phase as we strive to support the growth of Focusing in even more effective ways

It is very important that you experience The Focusing Institute as the International Focusing organization. We want to do more to support you and we hope you will support us in making this even more transparent.

Recently we have begun several initiatives which happened because a Coordinator saw a need and with The Focusing Institute's encouragement and support, new projects are underway such as

**International Support Team for Ways of Fluid Conflict Resolving**

Initiated by Astrid Schillings from Germany. The intention to find this pool of people arose out of a desire to offer the skills and attitudes of listening and holding the space open for communication, when there is difficulty, misunderstanding or conflict between members of the Focusing Community. Already there are 9 participants representing 9 countries and several others have offered their services

**Weeklong Crossing Support group** Initiated by Doralee Grindler Katonah from the US.

We want to create an international team of people who will bring fresh perspectives regarding the vision for the Weeklong and will work together to function as a Crossing Support Group. Seven people have been invited from 7 regions of the world to get representation of the world.

**The Proficiency as Focusing Partner (PFP) recognition** initiated by Nada Lou from Canada is a first goal for people who experience Focusing as something they would like to learn more about, to continue/be involved with, and who want to have a solid experience of partnership exchange. Six people from 5 countries developed this recognition.

**The First World Focusing-Oriented Therapy Conference** initiated by Joan Klagsbrun from the US. It took place in November. It is our intention that this will take place every two years. We had 122 therapists from 15 countries.

We are entering our fifth year of the **Focusing Institute Summer School** Initiated by Nada Lou from Canada Last year we had 115 participants from 17 countries. It brings us great joy in welcoming and meeting people from all over the world.

Despite our small size, TFI's office operations are fairly complex due to our growing international membership. It takes time and skill to learn our office operations.

Examples:

- We try to be sensitive to the different economies around the world so we have developed a three tier fee structure for membership and certification fees.
- Our newsletter is translated into Spanish and Japanese and we welcome other languages if people are interested.
- We carry Focusing and philosophy books in different languages for our online store. It is challenging to work with publishers in other countries because of language and shipping costs
- Negotiate with publishers rights to foreign translations so as many focusing books as possible can be translated. Recent translation of Focusing in Turkish, Chinese. Process Model now in Spanish thanks to Edgardo Riveros
- For the Palestine trauma project supporting the translation of focusing materials into Arabic



During our growth as an international organization and as we strive to support our international membership, we have several needs:

We need an international lawyer to assist us so that all contributions from any country can be tax-deductible since we are a non-profit organization.

We need assistance in making it easier for you to pay your fees and donations by paying in your currency if you don't have a credit card

We want our website to represent our international sensibility and be readable in many languages, representing all the countries who are connected with us now and who may connect with us in the future.

One current TFI initiative for example has been encouraging the growth of community wellness Focusing in developing countries. – Pat will speak here

## **Appendix I – “Low Hanging Fruit”**

The following ideas flowed from the process of discussing TFI’s future and constitute a list of actionable items, some of which are already in progress.

- Administrative Group on Resource Development (Fund-raising)
- Agency Assistance: Further discussion with Resources for Human Development CEO and staff to brainstorm next steps for TFI’s strategic planning process (this is an offer on the table)
- CEUs Establishment for Professionals for TFI Events – Procedures prepared; test case in progress
- Management Team Formation for TFI, Interim
- Partnership Program re-engineering and revenue development
- Website Home Page Upgrade

## **Appendix J – Elements of a Business Plan**

### The Cover Sheet

- a) Include company name, company address, company phone number (including area code), logo (if any), names and titles of owners or corporate officers, month/year in which plan is issued.

### I. The Business Plan

- a) Executive Summary
- b) Description of Business
  - a. Business History (if existing business)
  - b. Products & Services
- c) Market Analysis
  - a. Target Market
  - b. Market Size & Trends
  - c. Competition
- d) Marketing Plan
  - a. Advertising & Promotion
  - b. Pricing
  - c. Distribution
- e) Operating Plan
  - a. Location & Facilities Description
  - b. Source of Supplies
  - c. Regulations & Legal Issues
- f) Management Plan
  - a. Management
  - b. Key Personnel
  - c. Business Resources

### II. The Financial Plan

- a) Sources and Uses of Funds
- b) Capital Equipment List
- c) Balance Sheet
- d) Pro-forma Income Projections (Income Statement)
  - d. Three-year summary detailed by month
  - e. Assumptions upon which projections were based
- e) Pro-forma Cash Flow Report
  - f. Three-year summary detailed by month

### III. Supporting Documentation

- a) Tax returns of principals for last two years
- b) Personal Financial Statement (SBA Form 413)
- c) Personal History Statement (SBA Form 912)
- d) Copy of current credit report
- e) IRS Form 4506 – Request for copy or transcript of tax form
- f) Copy of licenses and other legal documents
- g) Copies of principals resumes
- h) EXISTING BUSINESSES: tax returns last three years & interim financials (within 90 days).

**Appendix K – “Green Paper for the Board of Directors” [Redacted for Confidentiality]**

**Appendix L – “Understanding TFI’s Finances” [Redacted for Confidentiality]**

## Appendix M – Organizational Life Cycle Issues

Organizations, much like human beings, can be said to develop in a predictable sequence of stages. In other words, they have a predictable life cycle. However, organizational life cycle stages are not tied to chronological age and –unlike human beings may take actions to advance more rapidly to PRIME (full, maximally functioning maturity) and to retard the aging process.

According to research by the Adizes Institute,<sup>1</sup> the following are some of the “normal problems” of adolescent organizations.

### Normal Problems of Adolescence

- Internal conflicts among partners, but mutual trust and respect are still strong.
- Temporary loss of vision.
- Incentive systems rewarding wrong behavior.
- Yo-yo delegation.
- Policies made but not adhered to.
- Lack of accountability.
- Lack of controls.
- Because it is unclear who the real leader is, leadership struggles and power plays plague the organization.
- The company expects to increase both sales and profits, but there is no consistent planning.
- Meetings are generally useless. Although there are agendas, no one follows up on decisions because they are not enforced.
- The founder is easily irritated by the staff, and the staff resents the founder.
- Difficulty changing leadership style.
- Entrepreneurial role monopolized and personalized.
- Integration role is monopolized.
- The cost accounting system is useless.
- The company devotes resources to computer systems that do not serve well because they are based on a poorly defined structure.
- Decisions re promotions, titles, salaries, benefits, policies, and rules are inconsistent and easily forgotten.
- When there are problems, management’s response is to hire additional people to solve them.

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Source: Adizes, I. (1996). The pursuit of prime. Santa Monica, CA: Knowledge Exchange; Adizes, I. (1999). Managing corporate life cycles. Paramus, NJ: Prentice Hall.

By addressing these problems, adolescent companies can achieve their PRIME.

**PRIME is characterized by:**

- Vision and values—They walk their talk
- Institutionalized governance process
- Controlled and nurtured creativity
- Coalesced goals
- Conscious focus and priorities
- Functional systems and organizational structures
- Predictable excellence
- Growth in both sales and profit margins
- Organizational fertility
- Intra- and inter-organizational integration and cohesion

## **Appendix N – Future Search and Focusing**

Focusers and The Focusing Institute (TFI) have a mutual interest in the sustainability of focusing as a human practice for living forward. Based on the Future Search approach to action planning for large groups seeking a sustainable organizational model, such a workshop would take participants from Focusing's past, to its present opportunities and challenges, to a plan for an ideal future state of Focusing world wide, supported by a robust and renewed Focusing Institute. The workshop would be designed around three important aspects of the sustainability of Focusing and TFI. In a structured facilitation, we will:

- 1) Host a conversation about how we see our interaction future interactions with focusing and TFI;
- 2) Provide an introduction to the “future search” method, bringing together “stakeholders” in any human endeavor in a way that encourages them to commit to mutually agreeable action plans to take that organization forward; and
- 3) Combine focusing and future search to support focusers in committing to the action plans that are just right for them as volunteers to TFI, and any of its world-wide projects.

## Appendix O – Questions for Strategic Planning

By B. Dickinson, March 2011

The following questions are offered as a selection from which you can choose those which resonate most strongly with your experience of TFI and your considerations of its ideal future.<sup>2</sup>

### Accomplishments and Key Events

What are the key events and turning points you recall for each era?

1970-1979

1980-1989

1990-1999

2000-2010

For each of the three categories:

Self

TFI

World at Large

In terms of:

What you did?

What happened?

Why was it important?

What are you doing right now that you are proud of in your relationship to TFI?

What are you doing right now that you are sorry about?

### Current Trends

What trends affect our future? Please be concrete, give examples, and speak in terms of who and/or what.

What you are doing now in response to these trends?

What would you want to do that you are not doing right now?

### Imagining an Ideal Future TFI

Imagine a future we want to make happen. Put yourself 10 years into the future. It is now March 2021. Describe TFI the way you really want it as if it exists now. What is it like?

Use these guidelines:

Is it feasible, meaning people can do it?

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<sup>2</sup> Based on Future Search: Getting the Whole System in the Room for Vision, Commitment, and Action, by Marvin R. Weisbord and Sandra Janoff, 2010.



Is it desirable, meaning you want it to happen?  
Is it motivating, meaning you will work to make it happen?

Answer these questions:

How and in what ways did we grow?  
How is our work financed?  
What is the makeup and number of the staff?  
What is our organization / structure?  
What services and programs does TFI provide?  
How do we provide our services?  
What Technology are we using?  
What about our facilities?  
List your accomplishments since 2005.  
Note the barriers you had to overcome, and how you did it.

Achieving an Ideal Future TFI

What are specific ways to work toward a common future that you like?  
What short and long term action steps can you imagine?  
What are the steps you want to take right now to work towards TFI common future agenda?  
Short term actions (next 3 months)  
Long term actions (next 3 years)

Emerging Leaders

Who are the emerging leaders in the Focusing Community? What role(s) do you see them playing over the next 5 years? 10 years?

Energizing Initiatives

What are the initiatives in the global focusing community that have the most energy, commitment, following, or potential?

Financial Issues

**What are the critical financial issues TFI might address to move forward into its ideal future?**

Operating Issues

**What are the critical operating issues TFI might address to move forward into its ideal future?**

Stakeholders

**Who are the essential stakeholders TFI might engage in order to succeed in its ideal future scenario?**

Appendix to Questions for Strategic Planning

The questions that precede this section were developed from the protocol for a "Future Search" Conference, based on the methodology created by Marvin R. Weisbord and

Sandra Janoff. When presented as a group gathering, a Future Search Conference achieves better results than most typical strategic planning initiatives because the Future Search method manifests the following principles and assumptions.

#### Principles of a Future Search

The WHOLE SYSTEM participates--a cross-section of as many interested parties as practical. That means more diversity and less hierarchy than is usual in a working meeting, and a chance for each person to be heard and to learn other ways of looking at the task at hand.

Future scenarios--for an organization, community, or issue--are put into HISTORICAL and WORLD perspectives. That means thinking globally together before acting locally. This feature enhances shared understanding and greater commitment to act.

People SELF-MANAGE their work, and use DIALOGUE--not “problem-solving” as the main tool. That means helping each other to do the tasks and taking responsibility for our perceptions and actions.

COMMON GROUND, rather than “conflict management,” is the frame of reference. That means honoring our differences rather than having to reconcile them.

We will acknowledge and seek to understand what we really want together. We will accept and hear, but not reconcile, differences if they arise. People can and should continue to work toward their preferred goals, whether or not supported by the whole conference. Our purpose here is to base our joint action planning on common futures, making implementation more certain.

#### Assumptions of a Future Search

All the wisdom and skills needed to envision the future of TFI are already in the room.

There are many “right” pathways to reach a given point or end result.

None of us has the answers.

We need each other’s perspective of reality to get a better understanding of the whole.

Taking responsibility is the key to turning vision into reality

**EACH ONE OF YOU CAN MAKE A DIFFERENCE.**

- Learn from each other
- Pool your perceptions
- Agree to take charge of our future

The goal is to create a COMMON VISION of the future of TFI -- NOT to “fix” or “problem-solve.”