

Chapter 3

Leadership for Social Cohesion

The Gothic arch of the church or the dome of the courthouse once showed where the society's pioneer work of caring for all kinds of people was going on. More suitably for our secular, cosmopolitan world-come-of-age, a new style of leadership and revolutionary new social and spirit tools are available to the emerging caring community. The new style, called servant leadership, and the new tools are leading to the empowerment of persons and groups in all social classes. We'll examine the characteristics and costs of authentic community leadership and then look at groups and leaders using these powerful tools.

■ Called to lead

Most of our society's energies and resources are spent in maintaining our popular culture of hi-tech, economic growth, resource consumption, welfare bureaucracies, and nuclear war strategies. Nevertheless, a significant number of individuals and groups have heard a new Word, have broken away from the majority, and have begun building structures of a new, more humane and sustainable society. How does this breakaway happen? These persons experience something, gradually or suddenly, that shifts their view of reality. It can be a mystical experience, a world-shattering defeat (from alcohol, drugs, divorce, or loss of status), or a process of education. Whatever the cause, the result is a destruction of old illusions and a rebirth into a new view of reality, with the freedom to choose a new relationship with themselves and the world.

Of course, they could have denied this freedom to change, blamed their external situation, and retreated into an isolated lifestyle to lick their wounds. Instead, by mysterious grace, they woke up, embraced a new reality and chose a life of care, creativity and commitment. They have read and written new books; established new communities; learned respect for the cosmos, for the earth and global cultures; and formed action groups, networks, and alternative structures. They have awakened to an expanded realization of Being.

■ Ethical context

Twentieth century ethics asks: What does (not *ought to*, but *does*) it mean to be human? One answer is that to be human means to be in a consciously chosen relationship to the Final Mystery through myths, rites and symbols, and to affirm that life is good. It means to be conscious of my own relationships, for *I am* the attitudes I take to my relationships. It means to care for the whole world (humans *do* care, not *ought to* care). To be ethical, or moral, is to be decisional. I am free to decide that every situation and every relationship I am in is significant. The authentic (servant) leader models the fully human person. (See page 33, "Ethics and Freedom," on freedom, obligation and responsibility.)

■ Authentic leadership style

There is a difference between legitimate and authentic leadership.* The legitimate authority of a leader is conferred by the people led. It appeals to customs, values and symbols generally honored by that group. The scoutmaster, in citing the Boy Scout pledge ("A scout is trustworthy, loyal, courteous,...brave, clean and reverent.") is calling for application of the generally honored values and sanctions of that particular group. He acts as the legitimate leader of the boys' group.

Authenticity, beyond legitimacy, comes from self-consciously assuming responsibility for one's own deeds.

The authority of the authentic leader comes from a power outside the group, to which the group is drawn for the benefits of the relationship. The scoutmaster who lives his manly values by show-

* *legitimate authority*: explained and illustrated in the text. *Authentic authority*: authority related to something outside the group, as compared with legitimate authority which belongs wholly to the group alone.

ing respect for symbols and being successful in his own family and vocational commitments, serves as a role model for boys who want to become men. Authentic leadership calls the group to something outside itself.

Leo was one of our servants (who were naturally volunteers, as we were)... This unaffected man had something so pleasing, so unobtrusively winning about him that everyone loved him.... He did his work gaily, usually sang or whistled, was never seen except when needed—in fact, an ideal servant.²⁷

Leo, in fact, was truly serving as an authentic leader of the group. Such leaders define their role as doing and being whatever is necessary, in order for the group to get the job done, to reach its goal. The leader creates the climate of the group and helps others to develop interior resources to become leaders.

The authentic leader enables the whole group to observe, reflect, interpret, decide and act in any situation—through group processes that will shift their self-images to ones of confidence, intentionality, caring and ability to reach consensus—in order to perform as a team. Such leadership is often shared. A leadership panel (several experienced leaders acting together) can act as a corporate motivator, guide, orchestrator and sustainer. The panel can lead the whole group to be a powerful team.

■ Leadership style: Using life methods

The discoveries of science and events of history in the 20th century have radically shifted our worldview and the operating images out of which we live. We no longer see the world as hierarchical, but as interrelated centers of influence. We no longer see reality as objective, but as multiple perspectives, each of which names the reality it points to. To be an educated person today means to be skilled in *life methods*—methods for thinking, for creating one's own destiny (selfhood), and for participating in the global-social process wherever one is. To educate is to enable others to manipulate these skills so that their whole lives are a process of learning and growth. The imaginal educator* (motivator, guide)

* *imaginal educator*: one who is able to use, create and change mental images, or, pictures in the mind of "the world out there." The picture, or image, determines our thinking, feeling, deciding; we can perceive the

understands that one's images determine one's behavior and therefore intentionally and self-consciously uses a wide variety of tools and methods to beam messages that challenge a person's or a group's old, limiting images of self and the world in order to open the way for new, enabling images and new, more successful patterns of operating.

Direct messages

Using all the recent discoveries of how people learn and new techniques to accelerate the learning process, the motivator or guide repeatedly sends new information that intrudes directly on old images and invites the learner to change and grow.

Rational and intuitive exercises, the use of all the senses, meditation and visualization, mind mapping, and discontinuous periods that encourage creativity, as well as the intellectual methods of analysis and synthesis—all are tools that the motivator finds useful as she or he seeks to strengthen the ability of others to relate to life's situations with confidence and effectiveness.

The environment

We are, however, constantly receiving indirect messages from our environment and our relationships that either motivate or depress us. Messages that motivate us are those that extend our interior sense of time, enhance our sense of space, and expand our relationships. Responsible leaders understand the importance of indirect messages as well and utilize them to reinforce new ideas, new images, being conveyed or built upon. For instance, the leader seeks to expand the interior sense of space and time of the group by careful attention to the meeting space. The seating arrangement of a meeting room is a clue to the self-image of the leadership (hierarchical or egalitarian, flexible or rigid). What mood is conveyed by the color of the walls and the lighting? Is there a chalk board and wall space for display? What decor is on the walls? Decor should be inten-

external world only filtered through and interpreted by this picture in our mind. For example, in Cervantes' *Don Quixote*, the girl Aldonza thought of herself as "just a whore." When Don Quixote insisted he saw her as "My Lady," Aldonza reacted with anger, until her own self-image was modified by Quixote's persistent messages that she was a person of dignity and beauty. Only then did her feelings and behavior change from that of an abused whore to a lady.

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tionally related to the subject of the meeting, reinforcing its objective. The meeting room's decor might include: a year's time line that the group has created and a picture of Earthrise on the wall, an enlarged street map of the neighborhood, a globe and a blowup of a microorganism, and art objects from other countries. The image of standing on a bridge, related to all past and all future, puts the group's involvement in the world in an historical frame that gives meaning to its work.

The leader also utilizes group experiences that enhance the sense of time and space. Two exercises that give a new awareness of time are *The Timeline of My Life* and *How I Spend My Week*.

The Timeline of My Life (chart on page 67) begins with the year of my birth and ends with the year of my death, which I decide. The line is divided into decades with the present year marked. For each decade I put important world trends, important people and events in my personal life, and rites of passage and turning points. I then choose a title for each decade, naming the importance of that part of my life to me—affirming what is past and choosing what will be.

In *How I Spend My Week* (chart on page 68), each participant colors in a chart* of the 168 hours of their week with five colors representing sleep, personal time, family time, job/work, social/recreation, and community/world engagement—first, as it now is; and a second chart, as they would like it to be. All the varicolored charts are displayed on the wall and reflected upon by the group.

The group discussion following these exercises gives participants a new appreciation of their relationship to all of time and the possibility of setting new directions for the future.

The leader also pays careful attention to the time design of meetings and the longer, over-all rhythm of the life of a group, understanding its importance in motivating and sustaining the group. Key factors in creating a schedule which is motivating are establishment of a rhythm that alternates more intense and less intense and discontinuous activities; celebrations of accomplishments; and, perhaps most importantly, making time for reflection on and coalescing of group learnings or experiences—bringing them clearly into the self-consciousness of the group—at the end of an activity.

* Suggested colors are yellow for sleep; green for work; red—family; orange—personal time; purple—social/recreational; and blue for community and world engagement.

The Timeline of My Life		
	Title _____	
Years	Birth	Death
Titles		
P E R S O N A L		
F A M I L Y		
C O M M U N I T Y		
W O R L D		

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How I Spend My Week—Time Log							Date _____
	Mon	Tue	Wed	Thur	Fri	Sat	Sun
12:00 mid							
1:00 am							
2:00 am							
3:00 am							
4:00 am							
5:00 am							
6:00 am							
7:00 am							
8:00 am							
9:00 am							
10:00 am							
11:00 am							
12:00 noon							
1:00 pm							
2:00 pm							
3:00 pm							
4:00 pm							
5:00 pm							
6:00 pm							
7:00 pm							
8:00 pm							
9:00 pm							
10:00 pm							
11:00 pm							

In addition to the intentionality of the space design and the eventfulness of a time design, team-building within the group is critical to a motivated student body or community group. To be effective in the 21st century, corporateness is necessary, with a 21st century twist. The corporate leadership style is shifting from boss to facilitator of the team.

The team

The team must operate out of a common model. The leadership orchestrates the process of defining the vision, finding the contradictions, proposing strategic directions and creating the necessary implementing steps. Consensus is created when the team members look at the issues, decide the common values to hold, and consider alternative models of action until they can agree on one or more.

Critical to sustaining the life of the team is the overarching story that relates their tasks to the needs of the world. The sustaining role of the leadership is to help the team create an operating context and operating images through team symbols, songs and story. To be a guide to the team involves looking at the journey of each member, his/her gifts and vulnerabilities, and structuring opportunities for members to support and motivate each other. The effectiveness of the group then becomes greater than the sum of the parts.

Neighborhood residents, awakened to practical visions of dramatic upgrading of the quality of their living through cooperative ventures, have the motivation for serious, long-term learning and effective team actions. The theory of the four leadership methods described in this chapter is only a beginning. Real excitement happens when the methods are used in leading a group, as one sees concrete, doable plans emerge and concrete progress takes place.

■ Old Doc: Leadership needs bold spirit

DR. TERTIA: Doctor, everybody talks about leadership these days, but why is it so hard to find leaders for our neighborhoods?

OLD DOC: People are reluctant to take on the awesome role. No one will follow a superficial leader today. We wait for leaders who, though they may not know all the facts, have wrestled with the profound social, intellectual, and spiritual issues of our time.

DR. TERTIA: How about charisma?

OLD DOC: If you mean do our leaders need integrity, compassion and boldness: Of course they do.



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DR. TERTIA: You say there are four roles people expect of trusted leaders. Should one person try to fill all four roles, or plan to work in a leadership team?

OLDDOC: Team is always better, but you may need to begin alone.

DR. TERTIA: (reading) "There are four leadership roles to be considered in your relationship with the group: the Guide, the Motivator, the Orchestrator and the Sustainer.

"As guide, your most powerful tool is the Basic Discussion Method. This is a disciplined, step-by-step way of talking together about a mundane situation or statement. It is not often used in our schools or public discussions. Your job as leader is to practice the method yourself, insist that your group follow the four steps exactly, and look for the surprising depth insights in ordinary simple disciplined talking together. Lead your group in listening for the profound in the mundane."

OLD DOC: Listening carefully and speaking clearly are powerful tools for any group. The leader who teaches this kind of group conversation deserves to be followed.

■ Using life methods

This chapter sets forth four intellectual and social methods* leaders can use to guide, motivate, orchestrate and sustain groups:

- *The basic discussion method*—used to enable a group to understand a movie, book or other shared experience in depth;
- *The image shifting workshop*—used to form group consensus;
- *Strategic planning*—used for taking a set of unstructured realities, making sense of them, and forming a plan which all the group can buy into and agree upon to bring their combined leverage to bear on the situation; and
- *Celebration*—used to help regain a healthy perspective on life or on a particular task; helps people to see the magnificence of the forest after spending the last week taking inventory of the trees.

The reader is advised: These methods are best learned in front of real work groups, with the help of an experienced mentor. They are more than a series of "how to" procedures. They are a distinctive, interior, spiritual stance on the part of the leader. From this stance comes the leader's power.

* These methods were developed by the Institute of Cultural Affairs and used in 35 countries for the past 20 years. They work!

Regional Mentor Panelists (see Epilogue) who are using one or more of these four methods in their own work offer you their assistance in getting inside these methods and testing them in your own setting. Much of the “magic” of effective group leadership is the result of using a few key methods like these four, experiencing their internal dynamics, and thoroughly internalizing them so that they become “second nature.” Later we will describe these four methods as the distinctive hallmarks of the new church dynamic. In their function of affirming the goodness of life as it is given to each of us, their empowerment of each participant and of groups learning their use, these four methods are becoming as characteristic of the new spirit movement as were the Gothic arch and other architectural features of the medieval social institutions.

Leadership is more than methods. The leader’s self-understanding and image of his/her role in group decision-making is critical. This can be called leadership style and is critical to the development of group competence and confidence. More and more good leaders are using these basic life methods—tools for group thinking and analysis, participation in decision-making, and deciding and creating one’s future.

■ I. The basic discussion method²⁸

Søren Kierkegaard’s insights on the process of becoming a self provide the basis for the structured experiences that create new images and change lives. He understood that a person becomes free when he faces his life situation, takes a relationship to it, and self-consciously appropriates that relationship. In so doing he avoids becoming a victim of his situation or of his relationship to it. The same process applies to groups.

Moving from the objective level (the situation), to the reflective (taking a relationship), to the interpretive (appropriating the new relationship) releases a new level of understanding and action (decisional level). This process is transferrable. It works in the classroom, in leading a meeting to get consensus, in discussing a work of art or a story, in a problem-solving workshop, in strategic planning, and in conflict resolution.

Old Doc: Making conversation that counts

DR. TERTIA: My friend and I nearly had a fight with my department chief over the movie “Salvador,” a semi-documentary on U.S.

When you cannot see what is happening in a group, do not stare harder. Relax and look gently with your inner eye. When you do not understand what a person is saying, do not grasp for every word. Give up your efforts. Become silent inside and listen with your deepest self. When you are puzzled by what you see or hear, do not strive to figure things out. Stand back for a moment and become calm. When a person is calm, complex events appear simple.

—JOHN HEIDER; THE
TAO OF LEADERSHIP



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involvement in El Salvador in the '80s. He asked what the movie was about, and while we were trying to tell him about it, he dismissed it as propaganda. An outrageous way of dealing with an unpopular truth!

DR. PRIMUS: He allowed his ideology to govern his thinking, which we of course never do, do we? How did you handle it?

DR. TERTIA: We stopped talking. Why is it that he is so overbearing and dogmatic in ordinary conversation and so open and fair when he is teaching medicine?

DR. PRIMUS: You can hardly treat a movie like a clinical case. How should he have talked with you about something he'd never seen?

DR. TERTIA: Well, he could have asked us what we remembered about the story. Who were the main characters? What were some of the incidents? Who said what? Just beginning with objective observations focuses and sharpens our memory. Isn't that how we start taking a patient history and doing a physical exam in a new case?

DR. PRIMUS: Okay, say that we've heard some objective data: scenes, characters, plot. What is next?

DR. TERTIA: Next are feelings and reflections. Hearing events recalled by others, we start making connections. That movie had lots of emotional content. He could have asked us where we laughed or felt depressed or angry. He could have asked what similarities and differences there were to other movies we'd seen. Just as in medical diagnosis, exploring the similarities and differences among particular sets of signs and symptoms, in a variety of conditions, is how we discover what is going on.

DR. PRIMUS: I've noticed a strange phenomenon. The more highly educated a person is, the easier it is to jump over the objective recall and reflective analysis, and to expound on one's own interpretation of whatever the subject is. We doctors ought to know better, since we usually insist on an extensive discussion of all the possibilities before making a diagnosis.

DR. TERTIA: We have no right to interpret a situation until we have looked at all the objective data and reflected on it. After giving due consideration to the textbooks and experience of others, we are led to a probable diagnosis. After that we can decide on a treatment plan. My first question to the patient is not "What's the diagnosis?" I ask where it hurts.

DR. PRIMUS: Aha! And you don't start with, "What's the movie about?" If you really want to learn, you start with, "What do you remember?"



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DR. TERTIA: Right. I can't tell you what it is about until I've had a chance to discuss with someone else what happened and how we felt about it, and how it fits into the social consciousness. Then I can decide what relationship I am going to take to the movie. I've decided it is more than propaganda.

DR. PRIMUS: It takes effort to use a rational method, going from the objective to reflective to interpretive to decisional levels of discussion. We don't use it perhaps because we don't want more than a superficial conversation. Like "Hi, son, how was your day today?" Answer: "Oh, okay." Communication stops.

DR. TERTIA: You might surprise your son one day by starting with "What did your teacher wear today?" or "Name one thing that happened on the playground." It might lead to a conversation that goes to deeper levels.

DR. PRIMUS: Come to think of it, I could avoid a lot of arguments by beginning with objective questions.

How and why the basic discussion method works

The Basic Discussion Method (also referred to as Focused Conversation or the Art Form Conversation) structures interpersonal communication in a natural, productive way. It is "natural" because it follows the path the mind takes when it acknowledges and responds to stimuli. It is "productive" because it leads to decision and action.

This way of "talking" may seem awkward at first, partly because it requires us to be conscious and purposeful about an activity (communication) which we would prefer to do spontaneously. Another reason the model may seem awkward is that the Western social and educational systems have stressed abstract concepts and theory. In school and at work, we are seldom asked to describe something and/or relate it to previous experience. We have often been encouraged to "jump the gun" in our communications with others by assuming a mutual knowledge of facts, common images or similar experiences. We are often asked to evaluate quickly or judge things—a poem, a political system, a person's promotional potential, the source of a problem. This frequently leads to misunderstandings and poor judgments based on faulty or incomplete information.

The Basic Discussion Method was originally developed for use in guiding group discussions. It can equally well provide the structure for one-on-one discussions and for developing effective statements



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of praise or correction. It can also be used to organize reports to management on the need for decisions or on the results of decisions.

The method consists of a sequence of questions (or statements) directed at four "levels of consciousness (or discussion)." The four levels are:

Level 1—objective: "What words or phrases do you recall? Scenes? Persons or events?" Some well educated people have difficulty beginning with objective answers, which they consider "too simple." Actually, jumping to answers at the interpretative or decisional levels may be a way of avoiding real dialogue.

Level 2—reflective: "What feelings did you experience? What other events, stories, or memories came to your mind?"

Level 3—interpretive: "What is this story about? What is its meaning for our time?"

Level 4—decisional: "How does this affect me? Do I change my thinking or actions based on what I now know?"

Group conversation begins with first level, objective questions and answers. After everyone has spoken at this level, the conversation proceeds to the second level or reflective questions and answers. Several responses are needed, but it is not necessary to wait until

The Basic Discussion Method				
Levels	1—Objective	2—Reflective	3—Interpretive	4—Decisional
Questions	What objects, colors, action, words, phrases, scenes, persons, events, music, smells, etc., do you recall?	What were your feelings? What other events, stories come to mind? What colors or music would you add?	What is this story about? What is the meaning for our times? Where do you see this going on in your life?	What response are you going to make to this experience? What would you say back to this situation?
Context	The external situation	Internal response	Enlarging the context	Image of what is necessary
Function	Get clarity on the data	Relate self to situation	Relate self to larger context	Respond to a larger context
Dynamic	Common group experience	Composing a larger picture	Expanding the encounter with event into life	Active participation

each person has spoken before going on to level three (interpretive) and then to level four (decisional). Sometimes a level four answer is offered by someone in the group as a natural consequence of the conversation without the direct questioning of the leader. In any event, the conversation should always end at level four.

Protecting the freedom and integrity of the individual

Good leaders regularly use the Basic Discussion Method, although not always under that name, to guide groups through deepening levels of discussion to achieve greater levels of awareness that lead to new images of themselves and their world. These levels of discussion allow and empower each participant to shift images in accordance with his/her own developing value screen. The consistent use of the Basic Discussion Method lessens interpersonal conflict, helps the group get beyond immediacies, and sends the message that each member is responsible for thinking through his/her own decision to participate.

Success with this technique requires more than careful thought for the questions to be asked. In leading such a discussion, leaders needs to be conscious of the images they are projecting—in their style of conversation, dress, and mannerisms—and what kind of messages the group is getting. Does the leader's bearing affirm that life is good? That we can live our lives in spite of limits? Does the leader, by constant affirmation and encouragement of individuals, enhance their participation in the group?

The responsible leader cares for the journey in consciousness of each member of the group. Solitary meditations, journal writing, singing and numerous other rituals that expand awareness can be used in meetings to raise the energy level of the group and to help, as well, to improve the quality of the work produced.

■ II. The image shifting workshop

It is my image of the world that largely governs my behavior. Every time a message reaches a person, his image is likely to be changed, and as his image is changed his behavior patterns will be changed likewise. *The meaning of a message is the change it produces in the image.* This means that for any organization there are no such things as facts, only messages filtered through a changeable value system.²⁹

All the great civilizations had one thing in common, a positive image of the future, infusing the present with purpose and expectation.

—ROBERT BUNDY

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Messages designed to shift interior images and behavior have been used by advertisers for many years. Information, concepts and ideas may stimulate thinking. But unless thinking is translated through a value screen into messages that shift the receiver's image of the subject, thinking has no effect on behavior.

The group leadership or the teaching team decides, out of their own context, what new images are needed to replace old ones (from "We are victims" to "We can do something"). Given the trends in our world, and the future needs of our community, what new images does this group need to be effective? What will make the group receptive to these new images?

Scenario:

Changing attitudes at a neighborhood meeting

On the opposite page is a chart of how leaders might begin to analyze their group situation in order to improve it. It could be a classroom, an office, a home or organization. The workshop is based on the supposition that images determine behavior; messages can change images; and new images change behavior.

In this scenario, a few members of a neighborhood association are meeting in a home in a depressed inner-city neighborhood where residents feel neglected and disconnected from the larger city and world. The members wonder how they can turn the situation around. They know that for anything to happen in the neighborhood, people's attitudes will have to change. They have a good leader who asks carefully chosen questions, requires short answers, encourages each person to participate. They set up a chalkboard, and one member keeps careful notes which will be copied for all to have before the next meeting.

First, they decide what to focus on. Should it be the neighborhood association or the neighborhood as a whole? They agree on the latter. Then other basic questions: What is the self-image of the neighborhood? What messages are residents getting that reinforce that self-image? What changes in their self-image are needed for change to happen? What is blocking that? What new messages are needed to shift from old attitudes to new attitudes, and thence to new behavior?

This meeting will be followed by individually assigned homework and a further meeting in two weeks, to decide how to beam the messages needed in the neighborhood. Engagement reinforces new self-images. Real social change becomes possible.

Image Shifting Workshop

Opening Conversation	Full Group Brainstorm	Two Team Workshops	Full Group Reporting	Reflection and Next Steps
<p>Facilitator begins the meeting with questions:</p> <ol style="list-style-type: none"> 1. Objective: Name one problem you see in the area. (E.g., fallen street signs, trash....) 2. Reflective: What operating images do these reflect? ("It's the city's fault.") 3. Interpretive: Why do we have these images? ("I've called and they won't do anything here.") 4. Decisional: What can be done about it? What could we do about it? <p>—Go into brainstorm—</p>	<ol style="list-style-type: none"> 1. Individual brainstorm, silent, listing several attitudes of residents and leaders towards the community. 2. Scribe writes all of these on board as they are volunteered. 3. After all are up, the facilitator helps the group cluster similar items, and name the clusters. 4. Choose 2-4 attitudes or operating images that need to be changed first ("We can't control vandalism.") 5. Choose those negative images, that if they could be turned around, would lead to real breakthroughs. 	<ol style="list-style-type: none"> 1. Break into two subgroups, each group to deal with one or two attitudes that need changing. 2. Each subgroup uses 2 worksheets: Worksheet I asks what <i>messages</i> are we getting that <i>reinforce</i> the old image? From the city? From the environment? From ourselves? Worksheet II asks what <i>new attitude is needed</i> to replace the old one? And, what <i>messages</i> are required to make the shift? (What change in the environment? What new self-story?) <p>Write the attitudes and images on index cards to put up in front of whole group.</p>	<p>Reassemble the two teams into the large group.</p> <p>Put up the new attitudes required.</p> <p>Each team reports.</p> <p>List on board all the messages needed to achieve the new images or attitudes.</p> <p>Group discussion: What strikes you? Where are there overlaps?</p> <p>What are the hardest? ...the most do-able?</p> <p>What have we learned from this exercise?</p> <p>What are the implications for the community? ...for us?</p>	<ol style="list-style-type: none"> 1. Facilitator brings meeting to a close with a question: "What did we accomplish in the last two hours?" (Important to get feedback.) 2. What are our next steps? 3. When is the next meeting? Who will be host and who will be facilitator?
15 minutes	30 minutes	30 minutes	30 minutes	15 minutes

■ III. Strategic planning—A motivating event³⁰

With decreasing participation, declining membership or falling sales, what organization has not faced the challenge: *Change or die!* Leadership may have lost its vision and the organization its mission to address a need in society. The challenge is to address the collapse of old values and symbols that once provided a framework for the mission and operations of the organization. How can one create effective strategies for change in the midst of past failures and future ambiguities?

Answer: begin with the present, the indicative situation; get all the necessary players around the planning table.

Strategic Planning is a participative process of strategic and tactical thinking elicited in a group by a facilitation team trained in the Basic Discussion Method, the Brainstorm, Gestalt, and Contradiction Analysis (see Figure 3-1, page 80). The indicative planning process is applicable in corporate board rooms and village squares. At the end, whether the process takes three hours or three days, the participants take home a plan they themselves have just created and are now motivated to implement.

Keys to motivation are affirmation of the group by the facilitation team, discontinuous celebrative events in the planning process, and the reflective conversation using the Basic Discussion Method after each workshop.

The planning process

Simply put, the process asks and answers five questions:

1. What is the focus question or what is the arena of planning?
2. What is your vision? What does the group want to have happen?
3. What are the challenges you face? What is blocking your vision? Why hasn't your vision happened?
4. How are you going to remove the blocks? What are the strategic directions?
5. What are the implementing steps, by whom and when?

Step 1: The practical vision

Through a directed conversation, visualization or brainstorm, the group articulates its own self-understanding in relation to present and future trends. The Vision Statement clarifies the direction the group wants to move in terms of specific activities or structures.

Step 2: The challenges (contradictional analysis)

Group members brainstorm all the irritations, negative attitudes and actions which they perceive as frustrating or blocking the realization of their practical vision. The aim of the challenge workshop is to identify the negative forces and to name them as a web of challenges. Defining the challenges is the most difficult part of the planning process, but this part must *never* be omitted. The real blocks to change are never superficial. They are usually related to negative attitudes, symbols or self-story. The facilitator must push the group to articulate the *why* behind the obvious irritations and external obstacles. (*Why* is it that we lack money, members or time?) It is most important to identify the underlying issues or contradictions. To do this the facilitator helps the group organize the brainstorm into groups or clusters of similar items.

The group is then asked to name the contradiction underlying each cluster, which is worded as a challenge (e.g., unexplored financial resources). Discussion continues until the group agrees on the contradiction, which may be a struggle. Once the the challenge is identified, there is a feeling of release, like understanding the root cause of one's symptoms. After consensus is reached, the group is ready to break for some discontinuous activity: refreshments, singing, or muscular exercises.

Step 3: The strategic directions

The group divides into subgroups of five to seven persons. The task of each subgroup is to think of several concrete actions that, if implemented, will remove the blocks and open the way to realizing the vision. Each subgroup brings its proposed actions, written on index cards, to the total group in a plenary session. The whole group clusters the proposals into different strategies, according to their intent. Again, they must come to consensus on the title or name of each cluster. Under questioning by the facilitator, the group decides which strategic directions are most critical to changing the situation, and which are needed to support the former. A diagram can show the relationship of all the strategic directions agreed upon.

Step 4: The implementing workshop

The amount of time for such a planning group to get through the Strategic Directions phase is from three to six hours. An additional two- to three-hour workshop is usually needed to develop and schedule the practical programs to implement the strategies; to answer the questions who, what, where, when and how.

WORKSHOP METHOD

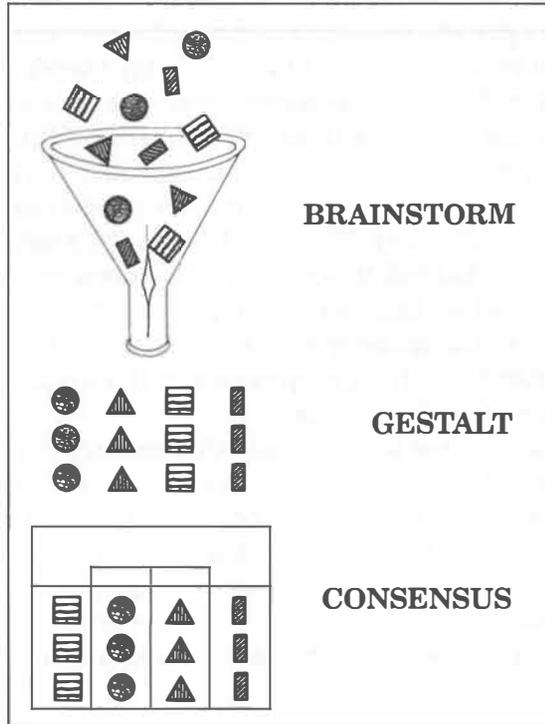


FIGURE 3-1:

THE WORKSHOP METHOD

This leadership tool is central to both the Image-Shifting Workshop and Strategic Planning.

1. A **brainstorm** of ideas from all members of a group encourages a good selection of raw material. By writing down all contributions, the leader signals that everyone's participation is important.

2. The **gestalt** distributes brainstorm data into similar groupings. Ideas which may have seemed unrelated, or even stupid, often get transformed into jewels when combined with supporting data in a logical matrix.

3. **Consensus** is reached by talking through the gestalt matrix: Which groupings are more central to doing what the group wants done? ...How do the groups relate to each other?

This indicative planning process, when all the relevant players in an organization or community group participate, is a powerful tool in reducing the resistance to change. The experience gives the whole group a new vision of possibility and ways to achieve the objectives which they themselves have decided upon. In the Implementing Workshop, for each strategic direction the group creates several tactics which are scheduled over a given time period (e.g., a quarter or year). With little wasted time or energy they have created a plan and are motivated to act on it.

Step 5: The document

Rather than have outside consultants take away the brainstorm of goals, objectives, good ideas, and problems of a group, later to return with recommendations, this strategic planning process ends on the last planning day with distribution of the participants' own words in a completed document. Those in the meeting who have created their own vision, challenge statements, strategic directions

and implementing steps have this material before them in print. Included in the document are the products of the workshops, list of participants, acknowledgement of those who helped put the event together, and a cover symbolizing the identity of the group. This becomes a reference point for those who will implement the plan.

Strategic planning is a cyclical process. Once the plan is put into action, the situation changes. New visions are possible, and new blocks arise that require new strategies to overcome. The process is repeated as needed. A design conference with key leaders beforehand can select the kind of facilitation team and length of planning needed for the purposes of the group.

■ IV. Celebration

OLD DOC: I saw a greeting card in the store that said "Let's celebrate!" on the front, and inside against a background of exploding colors, was "Anything!" It was saying something about our impulse to celebrate. I bought it.

DR. TERTIA: Fiesta! Let's do something different! Perhaps it's an invitation to escape from the day to day.

OLD DOC: I don't think so. Celebration is the opposite of escaping life. It is embracing and affirming it, in a special way. A thoughtful person would have written "Everything!" instead of "Anything!" It is different from a party, though some parties are great celebrations, just as recreation is different from entertainment. It has to do with consciousness.

DR. TERTIA: Celebration is a churchy word. Celebrate mass, celebrate communion, as a way of getting reconnected with the source of life. And the Jews have a blessing for everything, which I suppose is a way of celebrating life, "*L'chaim*, to life, *l'chaim!*" Singing, dancing and telling funny stories, and making toasts!

OLD DOC: Singing, dancing (kneeling, processions), telling stories (homilies), and making toasts or offering prayers—in one form or another celebration is in every culture. It is part of being human. It's a way of connecting with the past and anticipating the future. And above all, it is a community activity. I don't know if I can celebrate by myself.

DR. TERTIA: I think I can. If I feel especially good, I can celebrate anything, or everything. In spite of the tremendous diversity of celebrations in different cultures, the occasions to celebrate seem similar. There are the rites of passage: birth, puberty, marriage, graduations and death; national holidays, religious holidays, and



NEIGHBORHOOD CARETAKERS

seasonal holidays. I've noticed, however, that people don't necessarily look happy at celebrations.

OLD DOC: People's feelings may not be the most important element. It is their decision to participate that counts. The closer the festivities approach the sacred celebration of life, the more authentic they are.

DR. TERTIA: What are the elements then? Are they basically all religious? If I celebrate my anniversary by going out to dinner and a nightclub, is that a party or a celebration? Church, it isn't.

OLD DOC: Sacred* liturgy rehearses the dynamics of living in relationship to the divine, and to all of creation: praise, confession,† absolution and dedication.Δ These same elements are part of secular** celebrations too.

DR. TERTIA: And how do you see that going on in a nightclub?

OLD DOC: Take eating. As human beings we are grateful for the food and drink that we enjoy. So that could be the occasion for praise and thanksgiving, whether expressed or not. Music and singing, if they express the love of life, creativity, and passion are a form of praise, too.

DR. TERTIA: True. Great performers draw in the audience, so we sing along silently or keep time, or whatever, when we are really enjoying it. I suppose that could be interpreted as praise. But how about confession? In a nightclub it is easier to sin than to confess sin.

OLD DOC: Can't you poke fun at yourself? That is confession. That is why we like standup comedians. On our behalf the comic pokes fun at everything: the president, war, politics, popular religion, the economy. Their satirical jokes show up our society with all its faults.

DR. TERTIA: I think that is why I like Phyllis Diller and Kathy in the comics, not to mention Doonesbury. Confession. Then what is absolution?

OLD DOC: The belly laugh. The comedy that can release us and help us let go. It is the slapstick, the pratfalls, the dumb jokes in skits, utter foolishness. Norman Cousins wrote a book on laughing yourself back to health. My father had a great gift of saying

* *sacred*: holy; separate from our ordinary normal experience.

† *confession*: free admission of the truth of the matter. Example: "I have done wrong. I need your forgiveness and help."

Δ *dedication*: exclusive or significant commitment to a purpose.

***secular*: belonging to this wonder-filled transient life; not religious.



something funny that would dissolve the hostility in a meeting and allow the business to go on.

DR. TERTIA: Back to the nightclub. We have the praise/singing, and confession/satire, and absolution/comedy. Nothing left but the dancing. How is that dedication? Perhaps I should ask what *is* dedication?

OLD DOC: Dedication to me is total involvement. And dancing, to enjoy it, requires total involvement in movement, in rhythm with other people on the floor and especially with your partner. And sometimes, as the dance continues, you can throw yourself back into life with a new perspective and new appreciation.

DR. TERTIA: Would that the old church liturgy were as lively as celebrating life with singing, dancing and laughing at ourselves in a secular liturgy. Worship in church seems like a very private experience.

OLD DOC: On the contrary. Neither worship nor celebrating is an individualistic exercise between you and the Divine. If you feel part of the church community, then the praise, confession, absolution and dedication will be as lively as the singing, dancing, satire and comedy of a good cabaret.

Planning a celebration

According to the dictionary, to celebrate is to observe with ceremonies of respect or festivity, to extol or praise. Planning the use of time and space to achieve celebration is an excellent way to build cooperation in a team and to practice the skills of up-front leadership. This is an occasion to use the chalkboard, make one or more brainstorm, create a timeline and, most importantly, hold people accountable through team assignments.

On the next page is a checklist for a well-planned celebration. All the answers, however, depend on the answers to the first two questions: Why and what are we celebrating? and What do we want people to experience? Are we celebrating to affirm a job well done? To honor accomplishment and effort? To mark a rite of passage?

What do we want to happen to people? Do they need a shift in spirit from discouragement to hope and re-dedication? Do they need to feel affirmed and appreciated? Do we want them to come away with an expanded awareness and deepened consciousness? Are the dynamics of life celebration there in secular form (confession, absolution, praise and dedication)?



NEIGHBORHOOD CARETAKERS

Procedures for Planning a Celebration		
WHY	What do you want to happen to people? Everything else depends on this!	
HOW	Mood	exuberant, calm, wild, delighted, meditative, intriguing...
	Theme	what ties it all together
	Activities	singing, dancing, performing, eating, drinking, making things, contests, set-up, clean-up
	Space	indoors, outdoors, familiar space, strange space, seating arrangements, lighting, color, flowers, cloths...
	Timing	beginning, middle, end, transitions, high point, prelude...
	Food	type, how prepared and served, variety, theme
	Music	live, recorded, performed, equipment
	Budget	available resources, cost, how cost will be covered
WHO	Roles	assignment and contexting for host(s) and for those in charge of food, set-up, etc.
	Participants	how they are to be invited, what image they will be given as to dress, how they will anticipate and remember the occasion with delight

■ More is required: Two continuing leadership tasks

Once a neighborhood has awakened to the possibility of dramatic upgrading of the quality of its life through cooperative actions, responsible leaders have two possibly unpopular tasks. Both are absolutely needed if the awakened residents are to reach their vision.

A very important task for the leadership of the awakened neighbors is to guide them into compassionate care for *all* who belong in their neighborhood. Stories in this book include many concerns for the previous outcasts of our world society: criminal offenders; crazy folk who put varying burdens on their fellows; illiterates; the unemployable; neighborhood residents who sicken or otherwise suffer and die needlessly, especially in childhood. A neighborhood or community of any size which turns away from these groups has violated the norm of our times and has ignored the

Leadership for Social Cohesion

only political consensus we are likely to have: All the earth belongs to all the inhabitants. All the resources and tasks of the neighborhood belong to all its residents. Those who must go off to war or to prison or hospital one day (usually) will return. The viable neighborhood will not ignore their needs and contributions.

The second perhaps unpopular task of responsible leaders in the newly awakened neighborhood is to honor hard work, serious learning, eagerness to experiment. Just as in some vigorous religious groups every member is expected to study the holy scriptures daily, so in real neighborhood development many residents should be expected to enroll in needed new studies of practical business, construction, health, and leadership skills. The future *does* belong to those willing to work hard, work smart, and work together for the common good.