

Continental Prior's Council
Quarter II, 1977-78
December 9-11, 1977

ICA THE INSTITUTE OF CULTURAL AFFAIRS
CONCERNED WITH THE HUMAN FACTOR IN WORLD DEVELOPMENT

December 1977

Greetings in anticipation of the New Year:

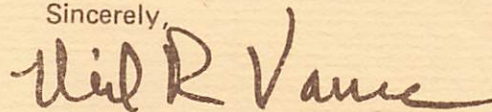
The Year 1977 has been marked by a Resurgence of the Human Spirit in local communities across the world. Our time is one of a new breakloose in Profound Humanness for everyman. Our gift to you this season, which we wish we could enclose, is three books: *The Book of Five Rings*, by Miyamoto Musashi; *Trinity*, by Leon Uris; and *Village Reconstruction*, by Mahatma Gandhi.

During this year more than 1,200 Town Meetings and Community Forums have been held in North America, completing all counties in eight states and two provinces. More than 200 have been held in another twenty-two nations. The launching of 24 demonstration local communities has been completed, with Human Development Projects in twenty nations, circling the globe every hour on the hour. From Rural villages in India and Mississippi to Urban neighborhoods in Berlin and Washington D.C., these communities stand as demonstration signs of practical possibility for local man everywhere. In India the initial village, Maliwada, has been replicated into 16 villages in the State of Maharashtra, with another 20 villages being added this month. Your support over the year has made possible this great leap forward.

In response to this breakloose in local communities, we anticipate the continued acceleration of our programs. In the year ahead, Town Meetings and Community Forums will be held in the remaining 2,200 counties in North America, awakening this continent to renewed hope. The initial 24 Human Development Projects will become self-sustaining. Another 28 will be initiated. Twelve of these will be in North America, placing a demonstration village or neighborhood within a few hours of every community. In the State of Maharashtra, India, another 56 villages will participate in the project by Summer, bringing new hope to this nation that is a symbol for our time of human suffering. In addition, the LENS Seminar, The Community Youth Forum and the Global Women's Forum will awaken specific groups to the possibility of profound human life and significant social engagement.

This rapid expansion of program is thrust upon us as the demand of our moment in history, giving us permission to be those who care and to bear the weight of this responsibility. Meeting this demand places severe strain on our financial resources. Your continued support will enable this expansion to continue into the New Year. Your contribution before the New Year begins will be greatly appreciated by those whom your support enables us to serve.

Sincerely,



Neil R. Vance
For the Corporate Office

GLOBAL PRIORITIES

1. The Globalizing of Global Community Forum
2. The Mighty 250
3. The Do-ment of the 24
4. The North American Counties Saturation
5. The PAKK Expansion Strategy
6. The Area Singapore Strongholds
7. The Latin American Beachheads
8. The 12 U.S.A. Projects
9. The Impact Tools Intensification
10. The Year of United Kingdom
11. The Global Management Systems
12. The Five Urban Signals
13. The Local Church Engagement
14. The Metro Circuit Formulation
15. The Profound Humanness Research
16. The Global Panchayat Launch

	GROUP	TASK
1	PROJECTS EXPANSION	Develop a priority list for the next 12 projects in the USA in the context of planning for one per region.
2	URBAN MISSION	Create a working model for the task of the House, especially the permeators, in and around the cities in which Houses are located.
3	MANEUVER LOGISTICS	Design models for logistical support of maneuvers, especially smaller maneuvers consisting of two-six people.
4	FORCES EXPANSION	Suggest methods to be used to recruit and train additional HDP staff, GCF circuiters and guardians.
5	FUNDING DESIGNS	Develop models for coordinated GCF funding work including all troops and all services.
6	SATURATION PREPARATION	Create models for the use of the Assembly, publications, stories, and intentional mythology to prepare territory for saturation.
7	CONTINENTAL CALENDAR	Create a draft calendar for Quarters III and IV with projected dates for GCF victories and other campaign dates.
	PROCEDURES	<p>The product will be a one-page statement of the seven emerging directions in the assigned arena.</p> <ol style="list-style-type: none">1. Brainstorm and discuss the issues in your arena.2. State the basic contradiction.3. Discern and articulate the emerging trends.4. Decide the seven proposed directions.5. Write a short paragraph for each.6. Type and take to the Regulatory.

1. Materials Delivery:

The logistics dynamic enables the maneuver by doing materials preparation independent of set-up time. It is recommended that:

- a. A key materials check list for set-up and orchestration be created.
- b. All materials packets be pulled together before on the road setup begins.
- c. Decide on appropriate printing sources and equipment and secure.
- d. Include a block of time for production on a regular basis in the overall logistics plan.

2. Area Debriefing:

Each maneuver debriefs weekly in a format consistent for the entire maneuver. A tracking chart is helpful for sharing the status of a maneuver across the area. To compile a tracking chart, each house writes 2-4 sentences holding the victories of the week and statistics including town meetings done, counties broken open, money developed, etc. This data may then be brought together in chart form and disseminated to all houses in time for the next debriefing.

3. Practical Enablement

The practical enablement of the maneuver, food, lodging and transportation is planned ahead of the maneuver so as not to intrude into the town meeting set up time. Lodging is imaginably set-up on a quarter basis including motels, colleagues and friends' homes, tents and campers, etc. The circuiter supplies himself with a nutritious diet rehearsing that he is a demonstration to India through carrying his commissary with him, shopping at all the local supermarkets etc. Transportation care includes locating maneuver-length loans of cars and credit cards, preventative maintenance, imaginal leanliness and emergency planning. This is enabled through a comprehensive automotive checklist including materials to have with you, hazards that may be encountered, and the report upon returning from the circuit.

4. Adequate Advance Planning

An adequate advance plan, including all aspects of logistics, in kind, assignments design, rhythms, etc. prior to and including the whole period of the maneuver or operation, releases effectivity for set-up, development and authorization.

5. Maneuver Designs and Rhythm

Clean blocks of time must be allocated for logistics work within the overall maneuver as well as within the weekly timeline. Detailed three week advanced planning is essential to logistics happening, set within the context of the quarter and a particular maneuver. Giving imaginal names to maneuver sweeps or blocks of time helps focus activity. Compile a specific list of needs or request relative to logistics support available for house and colleagues.

6. Metro Colleague Engagement

The edge in metro colleague engagement next quarter will be bringing intentionality into the use of their time, roles, training, homes, cars, etc. A metro colleague is anyone who lives in the metro whether they live in a religious or not. One aspect of this will be structuring time to creatively think through the context, stories, short courses that will release metro colleagues to engage in the maneuver. Some contexts may not be obvious. One example that worked with at least one metro colleague: "In the light of our decision to have a town meeting in every county in the country, we need to get you trained in doing _____." Another aspect is that we will stop being timid about asking people to commit themselves and their resources. One area got fourteen people to commit themselves to be under assignment for a year at a meeting in September. A third aspect is that we will break out of static ideas about what certain colleagues will do. For example, we will find new ways to engage colleagues who live a long distance from the house (e. g. circuit outposts) or who have floated away because they have not seen a way to plug in (e. g. circuiting on Friday and Saturday or on Monday). As another example, we will find new ways to engage cluster youth (assigning them to be part of an orchestrator team to enable the set-up, decorating, or even leading a workshop.)

7. Weekly Rhythms

The challenge for logistics is an interior design of the maneuver that effectively focuses time and energy of the troops so action is signficated and motivity is maintained. The proposed directions are:

- a. A corporate public calendar holding the quarter's time design and images of weekly missional focus and bi-weekly metro events.
- b. A weekly articulation of the miracles of the week including an image of Day II and Week II.
- c. A phasing model permittang clean blocks of time to be designated for particular tasks, reflection, celebration and discontinuous time.

North American

ARENA Maneuver Logistics

Advent

Continental Council

SEVEN DIRECTIONS WORKSHOP

Dec, 1977

LOGISTICS: Exemplary Action

CREATING
FUNCTIONAL
DESIGNS

ENGAGING
ALL THE
FORCES

THINKING
CONTRADICTIONALLY

TELLING
MIRACULOUS
STORIES

CONQUERING
IMPOSSIBLE
PRACTICES

HARNESSING
"KINDRED"
GROUPS

In the context of the comprehensive, missional peiorities, we create contexts and modesl that will allow groups with "kindred" concerns to engage in creating the victory. Our battleplan sets the terms of engagement. We enlist only groups met on the march. Examples might be university intern programs, Society of Friends, professional resource groups, Junior League or Appropriate Technology Institute.

AREA
TRACKING
SYSTEMS

Each area will set-up and maintain an effective tracking system which would keep a comprehensive picture of all assignments, hold a record of all persons who have been engaged in ICA tasks, provide a means for automatic update for continued and progressive involvement, and continually update and link movemental needs and troop potentials.

ICA
STAFF
CONSULTANTS

Capitalizing on ICA's growing image as consultants can be used to locate self-support salaries, networks of additional forces, authorization and program funding. Such consultant roles have been initiated through universities, county agents, agriculture extension service, county planning districts, local cities and church organizations. These provide more full-time and part-time troops for both GCF circuits and GSD auxiliaries for the North American 12, as well as access to new Guardians.

SPECIFIC
TASK/TIME
ENGAGEMENT

ASking colleagues and friends to commit themselves to a particular task for a given length of time is a needed breakthrough in engagement in the broader mission. This is done for Town Meeting circuiting and orchestration, for HDP consults, for special focus forums and for office coverage and House structure engagement. This may be done by short-term maneuvers and by continual recruitment.

RECRUITMENT
STORY

A direction in the forces expansion is the engaging of the local passion of Town Meeting grads in a wider context by revealing the indicative needs of nearby towns and the inter-relatedness of regional concerns.

VOCATION
RAISING
OCCASIONS

The trend is that people deepen their commitment on the other side of occasions which set the stage for the vocational question. The direction is toward creating such occasions and recontexting ourselves that every occasion is an opportunity to elicit engagement beyond the local community. Examples might be broadening mailing list for "Campaign News", supporting the "Campaign News" with a local newsletter, expanded uses of Town Meeting Assembly, Area Guardian meetings, Area Councils, RS-I, slide shows, impact courses.

"FOLLOW ME"

Troop recruitment will be structured within awakening and engagement events, through tailored pitches during the events and individual requests for specific needs.

HDP
CONSULT
RECRUITMENT

The HDP consult is a deep address to one's vocation and is a primary engagement tool for posing the question of long-term commitment to the mission. The direction is to focus areal/regional maneuvers to recruit consultants for each HDP consult as a component for expanding the GST.

In light of the funding resources currently available due to the 2,000 Town Meetings held and 60 GSDs established globally and the \$343,000 target for December to complete the year, it is recommended that \$1,200 per house be raised focusing on the story of Village Adoption. The basic elements of the story with the funding resources and images are listed below.

VILLAGE ADOPTION STORY

∞ The Movement across the globe stands in the victory circle of 2,000 Town Meetings and 60 HDP's. Twenty-four HDP's, every hour on the hour, stand as a sign of hope for all peoples.

India unveils a fascinating picture where 16 villages are experimenting with replication and have initiated an HDP with 20 more completed by Christmas.

The miracle of India is their decision to be self-sustaining by raising 94% of their program money within the country. We are enabling this miracle by raising 6% outside of India. Across North America we are concerned with raising \$48.00 or a breakdown of \$1,200 per House. For images of how these monies are used refer to the Development Packet that is available for each House. (The Village Adoption Program Budget, The Medical Challenge grant, along with the \$25.00 Gift Page) Also review images from the State of California Adopt a Village 3-page description. Those Who Care are always giving. We are asking Those Who Care at this Christmas season to symbolize their participation with a gift. Your contribution of \$\$\$\$ will help accelerate the victorious campaign of serving the world through the re-creation of local villages. This is not a question of whether your family is going to give but how much is going to give their participation in the sign of India replication.

FUNDING RESOURCES AND IMAGES

LAZARUS, COME FORTH

This source consists of Old Movement grads from RS-1, PLC, Academy, LENS, HRMs, etc. and previous donors who are not currently giving. These names can be found in grad files, mailing lists, or old donor printouts. As these people may never have been contacted before, potential leads would be to talk about the practical application of the course they took, or doing Fifth City all across India.

I'LL BE HOME FOR CHRISTMAS This means that all former and present personal relationships will be considered a source that can be tapped on your request as an order family to meet program and personal needs, for example, your former churches, your family contribution, your parents, brothers, sisters, cousins, Aunts etc, other order member churches, college and fraternity friends and contacts, employment colleagues past and present, business associates.

SEASONAL SOFT SPOT

Christmas gifts will be obtained from groups we have contacted before, i.e., churches, Rotary, YWCA who have discretionary funds or can take a special offering and from interested individuals within these groups.

A CHANCE TO CARE

We will select targets from lists of participants of recent impact courses such as Town Meetings, especially steering committee members and excited participants, key women from GWF's and Youth Forum participants to contact for personal contributions. They will be asked for a specific contribution such as \$50.00 toward a GWF in India, or \$25.00 for a baby scale for a village being adopted. Excited Youth (some of them wealthy!) can be contacted by House Youth for their contributions.

SOLID SERVANT SOLICITATION Colleagues who have pledged regularly or have given recently will be asked for a special December gift to serve as the base for the \$1,200 village adoption drive in which everyone will participate at least symbolically. Prospective consult participants will be asked to complete their yearly pledge and to double their pledge for December.

WOMEN & CHILDREN FIRST

Projected and scheduled youth and women Forums for Quarter III will be used as a focal point for raising money in December. Sources for this money include GWF and adult CYF grads (teacher, schools Superintendents), organizations that give exclusively to these causes, Town Meeting grads that are especially interested or are involved in youth and women's programs, and program fees for scheduled impact events paid in advance.

NO HANDOUT

ICA offices which have committed TM fees still outstanding are requested to contact the appropriate community person to arrange for the pickup of these fees before Dec. 31, 1977, done with appropriate humility, graciousness, and forcefulness, in order to close our books for the year. Where towns were not asked for money, a possible tactic is approach them; "Some town paid for you, why not contribute money for the next town?" having a town meeting. In order to enable future Town Meeting funding, both in setup and at every TM, a statement should be made that this costs the ICA \$\$\$\$ (amount decided self-consciously by each particular maneuver), part of which is funded by major grants and part of which is raised within the state/province from individuals and businesses. This gives us a way to move on funding locally, immediately or later.

MOVEMENT RATIONALE: The missional rationale for the movement in initiating 12 new projects in the Continental United States is part of a Global Strategy designed to expand the placement of demonstration communities in the nation which represents our current advantage and strength. The Geo-social grid of the 24 regions of the United States will serve as an overlay which gives direction to locate the strategic site of each project. These projects would be staffed by the relocation of 12 metro houses in the new sites. In addition, these projects will assist in releasing the 15% represented in the U.S. in service to the globe. These 12 demonstration projects will utilize the break-loose of the Town Meeting campaign as we seek to secure the authorization, framing and funding in order to release the resources, troops and expertise to be set-up previous to the initiation of the new projects.

**SOCIO-ECONOMIC
SCREEN:**

In preparation for the site selection of the next 12 Human Development Projects in the United States, the socio-economic screen used needs to emphasize a focus on the rural communities with visible deprivation, communities that are cut-off from the mainstream, but easily accessible and that show signs of being capable of rapid economic development.

**COMPREHENSIVE
NATIONAL
DEMONSTRATION:**

We are out to release a comprehensive national demonstration of human development. A comprehensive demonstration means the key contradictions of the nation are addressed; the major ethnic groups are included, projects are geographically spread, the economic diversity of the nation is taken into account, and the projects are focused on arenas of national sensitivity. In the U.S., projects are now being done with the urban and rural blacks and with Plains Indians. Other arenas of sensitivity to be addressed are Latino and Southwest Indian communities, migrant communities, Appalachian mountain villages, ex-mining communities, farming and mill towns and other such communities where major economic base has diminished. Such sites are chosen to enable maximum engagement by the forces of the seven revolutions and to significantly impact the mainstream and life-style of the Nation.

**TOWN MEETING
RELATIONSHIP:**

Human Development Projects in relationship to the Town Meeting communities are a concrete sign of awakened communities in action. As such visibility and accessibility, a demonstration with 4 to 5 hours of travel from any community in the U.S.A., and the periodic training and opportunities for engagement of town meeting participants and metro colleagues is essential. Also the opportunity for demonstration community residents to do Town Meetings in surrounding communities both grounds the principle of global servant hood and expands the visibility of the project itself. Town Meetings do demonstrations. Demonstrations do Town Meetings. THOSE WHO CARE do both.

EXPANSION
PHASING:

The expansion phase of G.S.D. in the U.S.A. was begun in 1977 with the initiation and acceleration of the 4 H.D.P's. In 1978 we are expanding with twelve additional H.D.P's, 3 per area in the U.S.A. In 1979, 8 more will be added so that every region in the U.S.A. will have 1 project. In 1980, every house, or 48 total, will have initiated an H.D.P., resulting in 2 per region.

REPLICATION
VISION:

The emerging consensus relative to the vision of replication across the United States is that it will cover the rural, urban, ethnic and the mainstream of Society in America. The relationship to the whole globe is significant in terms of how demonstrations provide replication models and release new troops for the rest of the globe. The remaining urban signals would be phased in at a time when we're able, because of long experience and urban saturation, to create a rapid visible sign. Among the many ethnic groups across the U.S., the replication will include the primary groups of Chicano, Latino, Indian, Black and Appalachian. The Mainstream refers to those locations which touch the broad historical consciousness of the Nation.

LOGISTICS
SET-UP:

The proposed direction for the logistical set up of the 12 new projects is that initial training be done by transposing Town Meeting support toward G.S.D.: that funding be secured from public and private sources on both national and local levels and that the commitment be secured before the consult for both project and staff support. Consults will be coordinated nationally for maximum impact across the nations. Consideration should be given to the possibility of holding the 12 consults in the month of August with the framing and funding in place and the auxiliary on site by the end of June. Site selection will be finalized by an experienced global team from outside the area. Engagement of guardians and other colleagues for long and short term maximum effectiveness is critical for project staffing. A key to securing effective new staff for auxiliary participation will be the consideration of a Human Development Training School to be held in North America in Quarter IV.

CONTEXT: Preparation for the saturation phase of GCF in North America requires thinking through our contradictions in several key arenas. The following statements are descriptions of these arenas, not statements of the contradiction. Some areas of North America have almost completed the county phase of GCF and will build their Q III battleplans focusing on launching the saturation phase in their areas. Other areas have considerable work to do in the county phase, yet even these areas will need to redo their battleplans for Q III. Thus all of the maneuvers in Q III will be either directly saturation phase maneuvers, or will be directly related to the saturation phase strategies of the area.

FUNDING PREPARATION: The first challenge lies in the arena of funding preparation. The growing visibility occasioned by the move to saturation as well as the greater numbers of local communities involved in further increased acceleration requires a decision on the public cost of "township" level meetings that will assure program self-support.

EXPERIMENTAL MODELS: The second challenge lies in the arena of experimental model development. The variety of questions which have emerged related to the catalytic role of communities which have had GCF during the county phase; the use of other impact tools to do saturation; the use of agency networks and township government structures; and the refinement of rapid set up models suggests the need for broad experimentation within continental guidelines to assure the maximal use of available weaponry and forces. Over the next 9 months we need several significant continental experiments that would prepare us for creating an appropriate model for moving on saturation by August.

TROOP MOMENTUM & READINESS: Once the 3100 counties of N.A. are completed we turn our attention to facing the approximately 20,000 "townships". To do this will require a veritable army. The issue now, therefore, is how we build continental force of colleagues who will stand ready to move on such a task. Key to this building is maintaining momentum in the campaign, both nationally and in house areas for both the Order and the movement colleagues and friends, as well as creating a series of events that train and prepare many, many more for the necessary roles in such a campaign.

RELATING TROOPS TO TERRAIN & OTHER 2 CAMPAIGNS: Moving beyond the one per county level raises dramatically the question of how we would saturate the terrain of townships across the continent. How would we initiate such a saturation? Would we use a local network across the geography? What would be our rational phasing across the continent? How would we relate this to the urban? The challenge here is to figure out how we would relate our troops to the terrain, the phasing of that, and how this intensification of the GCF campaign would be related to the intensification of the HDP's and the intensification of the needed global servant force.

SERVANT FORCE PUBLIC STORY: The situation of a limited geographic and political area will result in a new degree of public exposure, a higher profile than we have ever experienced as a movement. The

media will be reporting on GCF either with or without our invitation. This will require careful use of the public media on our part. To do this we will need to clarify how each maneuver guards the quality of awakening, as there is now no one available to turn over the awakening task to. This, then, requires a public story that relates our rationale of selection for saturation areas, as well as our intentions behind our saturation maneuvers. Saturation does mean more GCF's or numbers of forums. At the same time, it means this acceleration rests upon very specific strategic intents, which become part of our public story

TOWARDS THE ACTUATION OF COMPREHENSIVE HUMAN DEVELOPMENT PROJECTS

I ECONOMIC DEVELOPMENT	II HUMAN DEVELOPMENT	III SOCIAL DEVELOPMENT
1 COOPERATIVE AGRICULTURE 1. expanded cultivation 2. intensified production 3. water delivery 4. equipment pool	LIVING ENVIRONMENT 13. domestic housing 14. public facilities 15. village design 16. essential services	PREVENTIVE CARE 25. intermediate sanitation 26. total nutrition 27. systematic immunization 28. primary treatment
2 APPROPRIATE INDUSTRY 5. cottage production 6. agro-business 7. processing plants 8. ancillary industry	CORPORATE PATTERNS 17. total employment 18. community commons 19. village consensus 20. corporate work-force	FUNCTIONAL EDUCATION 29. early learning 30. formal school 31. youth training 32. adult education
3 COMMERCIAL SERVICES 9. common marketing 10. local merchandising 11. system process 12. lending channels	IDENTITY SYSTEMS 21. community self-story 22. symbol systems 23. corporate rituals 24. village celebrations	COMMUNITY WELFARE 33. family development 34. women's advancement 35. youth task-force 36. elderly engagement

Continental Council
ICA: INDIA

ACTUATION FORMULA: COOPERATIVE AGRICULTURE

EXPANDED CULTIVATION/INTENSIFIED PRODUCTION

1. Conduct survey during pre-consult time as to amount of land under cultivation, amount of land available for cultivation, what is planted, what is average production of each acre of each crop. Why more land is not under cultivation of each acre of each crop.
2. During Guild or consult pursue scheme to put land under cultivation
3. Solicit aid from agriculture Ext. Officer or local agriculture college for excursions, films and hybrid seeds and fertilizers.
4. Working with farmers guild start a Demonstration Farm where you would experiment with hybrid and new cash crops on behalf of all the village. Put up a sign to symbolize what the plots are.
5. Set up sample plots where as many of the farmers as possible would record all of the things they were doing to a particular area of a crop so that at the end of a season they would know who and why there was a better production rate than before and could begin to shift using other methods. Put up signs to symbolize farmers' decisions

WATER SUPPLY

1. Ascertain whether there is a water storage in your village or if its only a question of getting the supply to the crops. If there is a shortage investigate whether you need to set up a dam system to hold monsoon waters or do you need to work out a way to import water. Do all this with the aid of village farmers.
2. Once your actual situation is worked out and the ground water survey is complete create a program with the farmers guild such that sramdan can be done to initiate dealing with the problem.
3. Visit BDO and Water irrigation dept. relative to schemes available.
4. Working with the bank and Farmers Guild devise the simplest and cheapest method to solve the problem. The simplest solution may not be the best. Hold the tension between expense, speed and long range effectivity.

EQUIPMENT POOL

1. Working with village investigate what equipment is already available from themselves and the Gram Panchayat.
2. Invite Agricultural Ext. Officers and Agricultural College Reps. to come and discuss with them equipment needs and schemes.
3. Do not decide what you want before you have all the data! Once you have the data and village consensus investigate all sources of intermediate and up to date technology.
4. If you are going to purchase a tractor make sure you have enough acreage to support it and that a plan for repairs has been made.

POSSIBLE ASSISTANCE SOURCES

SFDA-Small Farmers Develop. Agency-for farmers with under 5 acres Ag. Ext. Officer-Under BDO-will supply seed and has several schemes for pumps, goats, cows and other things.
Bank's Agric. Branch and Agric. Officer -these banks or officers have knowledge of all bank schemes plus most of the time know about agro. business. Make a friend and he will be able to help you.

ACTUATION FORMULA: COOPERATIVE AGRICULTURE

Panchayat Samiti - Irrigation Officer - man in charge of Nalla bund and dam creation for each taluka.
Agricultural Colleges - may be approached for village training, excursions, doing the demonstration farm or assisting with it, hybrid seeds and also veterinary services.
Collectors Planning Officer-in charge of planning for the district budget and can tell you exactly how much is available for every scheme.

ACTUATION FORMULA: APPROPRIATE INDUSTRY

COTTAGE INDUSTRY

1. Research all of the ongoing industry in the village.
2. Raise the question at a village meeting as to who wishes to increase production and begin to sell in the open market.
3. Research possible markets or the village/taluka bazaar.

AGRO BUSINESS

1. Contact Dairy Development Society about selling milk from your village.
2. Raise the question of the Farmer's Guild as to what are processes that could be done to make more profit from the crop.
3. Contact Khadi Industries relative to possible agro industries in your village.
4. Raise the question of the district sukare contract coming to your village.

PROCESSING PLANTS

1. Meet with Industry Guild and discuss what industries they would like to start or at least find out if they are possible.
2. Do a survey of raw materials in the village.
3. Do a survey of local/district markets for possible products.
4. Contact local bank for feasibility of loan.

ANCILLIARY

1. Contact nearest industries about ancilliary possibilities.
2. Once offered a contract check out the feasibility of the industry.

INDUSTRIAL FEASIBILITY CHECK LIST

1. Raw material-either from the village or supplied by outside industry for ancilliary industry.
2. Capital-to be formed together by association not by becoming a society.
3. Labour-all industries should employ as many as possible without losing money.
4. Transportation-remember to figure this cost into the industry.
5. Training-is the training in the village or can someone from the village be trained outside.

SOURCES OF AID

MIDC Maharashtra Industrial Development Corporation
Industry Officer of the P.S./Z.P.
Small Industry Service Institute
Khadi Small Scale Industries Organization.
State Bank of India or other banks.
Council of Social Welfare.

ACTUATION FORMULA: COMMERCIAL SERVICES

COMMON MARKETING

1. Initiation of trader's guild, in order to form a village sense about marketing needs and present status.
2. Village marketing survey (passed out at Council 9/77) to assure present status of village internal and external marketing.
3. If village bazaar is necessary (not one already there) initiate creation with shramdan to claim the space.
4. Consense on location and timing at monthly village Gram Sabha.
5. Raise issue of external marketing and if feasible devise scheme to market goods in a large market.

LOCAL MERCHANDISING/SYSTEM PROCESS

1. Research with Trader's Guild the issue of village transport to market
 - a. present system
 - b. hopes of new system
 - c. need of new system
2. Research all local modes of transport plus other viable forms of transport.
3. If transport is a major issue do a workshop on solving the difficulty with Trader's Guild.
4. If possible set up local transport company in village but only if it can, according to estimate, make a profit.

LENDING CHANNELS

1. Investigate informally what the present channels are for the village, what inadequacies.
2. Approach local banks (Govt owned is best) about the possibility of adoption and special interest loans as a demonstration village.
3. Work out an approximate scheme of the entirety of loans both for capital and working expenses of all the profit intended programs in the Document, ie. Agric, Ind and commercial services plus housing, private latrines, water supplies. Present this to the bank at the local, division and perhaps the state level for approval.
4. Remember to maintain at every moment village people working with you so as not to give the impression that this is a massive gift. It must be understood that it is a loan.
5. Have a savings day to implant the idea of savings and budgeting.

LIST OF POSSIBLE SOURCES FOR COMMERCIAL SERVICES

- MIDC-Maharashtra Industrial Development Corporation to arrange loans for industry and small interest or low prices with only 25% down or less.
- SFDA-Small Farmers Development Agency-arrange loans for which they give subsidies of up to 33% depending on the individual.
- SBI-State Bank of India or any State Bank can decide to adopt the village meaning they pick up all loans for a particular village both past and present plus working with the village and aux. Design a total scheme for funding programmes. This programme is usually within 10 miles of a bank location particularly for agricultural loans but it can be arranged for longer distance by working at the Division level.

Continental Council
ICA: India

5

ACTUATION FORMULA: COMMERCIAL SERVICES

Chamber of Commerce - most talukas or district cities contain a C of C or Merchant's association which can be approached to purchase products from a particular village.

Service Clubs - Rotary and Lions may arrange for loans to be made even to defaulters through the good name of its members.

ACTUATION FORMULA: LIVING ENVIRONMENT

DOMESTIC HOUSING

1. Initiate survey of present housing in the whole village and classify under the categories of adequate, inadequate and needs repair.
2. Once you are aware of the housing situation, prepare a design for the simple model house and solicit participation from near by cities to get completion.
3. Request BDO for housing for special categories of people:
e.g. Landless labourers, etc.
4. Hold stake shramdans to do repairs and beautification on houses in their stake.

PUBLIC FACILITIES

1. Do a survey to ascertain all abandoned or partially used buildings
2. Meet with village/panchayat to discuss needed and available public facilities. As these are public facilities, any rent would be picked up by the village.
3. Hold a shramdan to recreate and prepare each facility. Have a formal opening inviting dignitaries who are related to each event and sign.

VILLAGE DESIGN

1. Arrange to have an architect at the consult to work with the Living Environment Task Force and do a village design and a model house plan.
2. If the first step is not feasible, ask a local architect, engineering or architectural college to send someone to the village to do the master plan, incorporating village participation through an informal gram sabha.
3. Design a model of present village layout and future master plan and display in a public place.
4. Design an overall budget for the anticipated changes with a breakdown of possible sources of funding.

ESSENTIAL SERVICES

1. Contact CEO to do feasibility survey and costing for village water service.
2. Contact MSEB re electricity for goathan area, approach roads, or extension of village lighting. Ask BDO about special concession for lighting to Harijan homes.

ACTUATION FORMULA: CORPORATE PATTERNS

TOTAL EMPLOYMENT-

1. Create a village roster, listing people who are employer, employed, unemployed and what skills each one has.
2. Apply to the Collector or CEO for Guaranteed Employment to employ unemployed temporarily in village care projects.
3. Inspect each case of underemployment as to whether or not there is a market difficulty or one that a bank loan would help.
4. Check employment schemes under Industry and Agriculture Programs.

COMMUNITY COMMONS

1. Do village shramdams on common spaces.
2. Claim village spaces through street signs, murals and location signs.

VILLAGE CONSENSUS

1. From the beginning solicit and symbolize the village consensus by holding monthly meetings with the village.
2. Be present at all village panchayat meetings.
3. Tea drinking is a key form of eliciting village consensus by visiting all of the people and getting from them their sense of what is going on and what needs to happen.

CORPORATE WORK FORCE

1. At each step of your time in the village you are creating, a corporate work force, enabling the village, the guilds, the stakes to work as a corporate group.
2. Hold village shramdams with celebrations at the end.

ACTUATION FORMULA: IDENTITY SYSTEMS

COMMUNITY SELF-STORY

1. Initiate self story by reminding village of the story they wrote at the Gram Sabha.
2. Start village bulletin board to announce everything that is going on.
3. Elicit village participation in production of "Voice" bulletin. Publicize events and activities in the village.

SYMBOL SYSTEMS

1. Erect signs to announce happenings in the village.
2. Create a cowk per stake to symbolize the new times in the village.
3. Always sing the national anthem after every meeting.

CORPORATE RITUAL

1. Create a time each month when a consensus can be pronounced on all guild and stake activities.
2. Continually remember that you are the servant of the village and respect all villagers all the time.
3. Use Namaskar, Ramdram and Kasakaj as a ritual to greet people each morning in the village.

VILLAGE CELEBRATIONS

1. Honour all village celebrations with appropriate auxiliary presence.
2. Quarterly celebrations of activities are a method of accountability and absolution which build trust between the villagers and the auxiliary.
3. Films and dramas are a key type of informal celebration in the village.

ACTUATION FORMULA: PREVENTIVE CARE

INTERMEDIATE SANITATION

1. Investigate present methods of sanitation of the village.
2. Working with the builders guild and architects design village plan including latrines and drainage system.
3. Construct latrines for public use to initiate village interest.
4. Begin shramdams to construct drainage systems in symbolic village locations.
5. Contact Panchayat Samiti as to latrine and drainage schemes available to the village.

TOTAL NUTRITION

1. As part of the Village Health Survey, find out what present nutrition rate is in the village.
2. Initiate monthly baby weighing to find malnutrition problems.
3. Get DHO to supply auxiliary nurse and vitamin injections for villagers.
4. Set up a village vegetable garden to supply preschool and community kitchen and also begin family vegetable gardens around the village.
5. Set up nutrition training programme to aid in knowledge of most nutritious diet.

SYSTEMATIC IMMUNIZATION

1. First attack the primary disease of the village through a health camp e.g. scabies
2. Set up village-wide immunization programme to cover every villager within one month.
3. Have auxiliary health person and village health caretakers keep check on all new children and give immediate immunization upon sickness.

PRIMARY TREATMENT

1. First check with the District Health Officer on the possibility of opening a village clinic or a health sub-centre. If one is already operating, check the extent of its operation.
2. Liaison with the local Primary Health Centre staff to arrange training of the health caretakers.
3. Arrange for an emergency vehicle to transport people to the nearest hospital, through the village panchayat or the DHO

SOURCES OF ASSISTANCE:

DHO, Service clubs such as Rotary and Lions to set up health camps.
Z.P. Executive Engineer, Panchayat Samiti and Gran Panchayat.

ACTUATION FORMULA: FUNCTIONAL EDUCATION

EARLY LEARNING

1. Contact every family of the village to find out the number of children, ages, and what class they are in.
2. Contact Panchayat Samiti about assigning a qualified preschool teacher to the village plus allocating funds for the applied nutrition program.
3. Contact Mothers for three things a) their children, b) 2 teachers from the village, c) 2 to cook each day for the preschool.
4. Contact Education officer for preschool materials.
5. Arrange for a visit by all three plus 1 Auxiliary to demonstration preschool.

FORMAL SCHOOLING

1. Visit school and parents and discuss what is going on and what more they would like to see happening in the school.
2. CEO visit and discuss possibility of assignment of Bsc, Scout teacher, or female teacher depending on the needs of the village. Make sure if there is a village education committee that you work with them.

YOUTH TRAINING

1. Locate all educated unemployed and upper grads or students and discuss their hopes and dreams and workshop how they can work with the project to achieve those aims.
2. Initiate Youth English Classes, Shramdan, and trips.

ADULT EDUCATION

1. Engage adults in Evening classes in three arenas: a) literacy (english and/or marathi), b) vocational skills, and c) management skills.

SOURCES OF ASSISTANCE

1. Education Officer- Panchayat Samiti
2. Social Welfare Officer - sanctions Community Centres
3. District Information Officer - for films and projectors.

ACTUATION FORMULA: COMMUNITY WELFARE

FAMILY DEVELOPMENT

1. Remind yourself in starting all programmes to involve the entire family through preschool/youth/adult programmes.
2. Initiate high school in family budgetting and nutrition courses.
3. Involve mothers in children programmes.
4. Keep list of all people in the village by stakes.
5. Record on a map all the people that have been impacted by the project either through programmes, stakes or guild participation.

WOMEN'S ADVANCEMENT

1. Hold mahila mandal meeting weekly with the aid of Gram Sacha Sevika and/or caring women of village leading the construct.
2. Hold nutrition training courses for women of the village.
3. Initiate women's involvement through training and setting up a women's only industry.
4. Hold Global Women's Forum in the village with city ladies present
5. Elicit women into leadership roles in all programmes possible including traditional ie preschool, community kitchen, etc. and not traditional, ie stake, guild and leaders meetings.

YOUTH WORK FORCE

1. Start a youth English/Marathi class
2. Work with youth in terms of shramdan on things which they wish to be made better, ie playground, common areas.
3. Begin youth sports events on a weekly or monthly basis of volleyball, cricket, etc.
4. Set up excursion programmes for village youth at their expense.
5. Apply to CEO for funds to employ youth either the money or food for work or a combination in order to get village work done.

ELDERS ENGAGEMENT

1. Visit the village elders in order that they do not drop from your consciousness and begin to formulate with them what their interests are.
2. Ask elders to do a heritage course for the preschool.
3. Involve elders in cottage industry and other economic programmes of the village particularly those demanding knowledge they possess.
4. Involve the elders in all programs and where possible use them for leadership roles.

POSSIBLE ASSISTANCE SOURCES

Social Welfare Officer ZP-for both poor youth children and women they have several schemes and grants for Industries, clothes and various forms of support.

Education officer - for additional materials and instructors for school and adult education classes.

Education societies-private organizations that can be approached for assistance in forming libraries and doing other short term education programmes.

Mahila Mandal-in nearest city in fund raising or programmes for village Mahila Mandal.

Continental Council
ICA: India

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ACTUATION FORMULA: COMMUNITY WELFARE

Khadi - for initiating funds for crafts and cottage as well as other industries.

NSS-National Student Service-possible work force.

Academy Post
Chicago Nexus

QUARTER IV ACADEMY: EVALUATION

Quarter IV
1977

OBJECTIVE DATA	QUARTER IV DESIGN	FACULTY EVALUATION			PROGRAM ROLE	SUMMER '77 WORK
		STUDENT JOURNEY	NEW CURRICULUM	FUTURIC DIRECTIONS		
the Participant Profile	the 8 Week Construct	the Student Evaluation	the Theological Revolution	the Specific Recommendations	the Training Needs	the Practical Steps
			the G. C. F. Lab			
			the Leadership Methods I			
			the Leadership Methods II			
the Spring Experiment	the Faculty's Reflections	the Faculty's Reflections	Community Development Philosophy	the Metamorphosis Implications	the Academy Import	the Practical Steps
			Consult Methods Lab			
			the Leadership Methods III			
			the Morning Collegiums			

THE PARTICIPANTS

The Global Academy of Spring 1977 was a diverse community of people covenanted for an 8-week experiment in imaginal education. The 8-week program was held at the international training center of the Institute of Cultural Affairs in Chicago from April 3 to May 29, 1977. Sixty-one people participated in this experiment including 13 faculty and 48 students. Of the students, 23 participated for the full 8 weeks and received certificates of graduation. 9 students participated for 4-week segments of the curriculum: 5 in the first half and 4 in the second half. One student returned and finished his remaining 4 weeks and received a graduation certificate. 8 other students were involved in the Academy for 2-week segments.

Those involved represented a rich panorama of diverse cultures, ages and experiences. 27 of the participants were female and 31 were male. Each phase was represented: 8 in phase one, 33 in phase two, 12 in phase three and 3 in phase four. Three continents and seven nations were represented: 11 from SEAPAC (4 from Australia, 3 from Korea, 3 from the Philippines and 1 from the Marshall Islands). There were 6 participants from the Republic of India, 35 from the USA and 4 from Canada.

The participants vocational experiences veered more toward the social development skills with a majority of school teachers, social workers and artists. There was only one ordained clergyman in the student body. The participants came to the Academy from a rich variety of contexts: almost 15% came to the program out of the work of Town Meeting in their local communities; 26% participants, or 47%, were under specific Order assignment. One student received high school credit toward his graduation. Five participants had had no previous movement experience at all. These came on the reference of past participants or movement friends. 9 students came to the Academy out of recent experience in social demonstration projects either as auxiliary or community volunteers. The remaining students represented a long time involvement with the movement, including LCX and PCE.

THE CURRICULUM OF THE GLOBAL ACADEMY

QUARTER II 1977

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
WK 1	THE SOLITARIES						
	THE CULTURAL REVOLUTION	WORKDAY Nexus Project		THE THEOLOGICAL REVOLUTION			
WK 2	DYNAMICAL SOCIOLOGY						
	NATION AND WORLD	WORLD DAY Global Gridding		GLOBAL COMMUNITY FORUM LAB		PLAY	CLASSICAL SEMINAR Kierkegaard: Sickness Unto Death
WK 3	THE CORPORATES						
	PSYCHOLOGY AND ART	WORLD DAY Art Museum		LEADERSHIP METHODS I		PEDAGOGY TUTORIAL	
WK 4	THE PEOPLE OF GOD						
	NEW TESTAMENT	WORK DAY Uptown "Voice"		PRIMORDIAL HUMANNESS LAB		CABARET	CLASSICAL SEMINAR Mathews: Christ of History
WK 5	THE OTHER WORLD						
	SCIENCE AND PHILOSOPHY	WORLD DAY 5th City visit		LEADERSHIP METHODS II		PEDAGOGY TUTORIAL	
WK 6	LOCAL COMMUNITY DEVELOPMENT						
	PHILOSOPHY OF COMMUNITY DEVELOPMENT	WORLD DAY Uptown Research		CONSULT METHOD LAB		BALL	CLASSICAL SEMINAR Bonhoeffer: Community
WK 7	THE HOLY LIFE						
	OLD TESTAMENT	WORK DAY Uptown Beautification		LEADERSHIP METHODS III		PEDAGOGY TUTORIAL	
WK 8	THE THREE CAMPAIGNS						
	INDIVIDUAL AND FAMILY	WORK DAY Odyssey Set-up		THE ODYSSEY			

THE QUARTER IV EXPERIMENT

As a program of formal training, the Academy has emphasized both the current edge of the work of the spirit movement and the common memory of its twenty five year history. In light of this the metamorphosis process of the Academy began after Summer '71 with the turn to the world. In the ensuing years each quarter saw significant changes in the curriculum in direct response to the training needs of the movement. This was the legacy out of which the Quarter IV, 1977 metamorphosis experiment was conducted.

Quarter IV was the most radical change in the curriculum since its inception in 1968. The indicative training needs in relation to the three campaigns was the framework out of which the following experiments were conducted:

1. Intensified Social Methods Training. Direct training for immediate engagement in Global Community Forum was conducted in a three-day lab which dealt with set-up, the consultant role, and workshop-leader and orchestrator training. Training for effective engagement in local human development took place in a demonstration GSD consult, with the students themselves playing the primary leadership roles.
2. Focused Contradiction Planning Methodology. Throughout the program a series of courses and collegiums exposed students to both the underlying why and how of indicative battleplanning and provided a number of practical labs where actual experience and skill in using this methodology was gained.
3. Radicalized Disciplined Missional Corporateness. Training in priorship, effective workshop and model-building methodologies and the practices of revolutionary action was the objective of several new curriculum blocks. These provided concrete opportunities for first-hand experiences of the power of missional corporateness through work, celebration, study and research.
4. Intentional Curriculum Transrationality. The underlying rhythm and rationale of the total program as well as the weekly/daily rhythm was one of the key issues of the Quarter IV experiment. The Academy began with a week of context in relation to the times and ended with a week of focused planning in relation to local engagement in the regions. The six weeks in between were structured to provide a more contextual focus for the highly practical labs which occurred on the last four days of each week. The work-day/world day rhythm as well as the celebrations provided crucial periods of discontinuity and solitary reflection. The Collegium rhythm was designed to provide alternate weeks of work on the spirit and the social.

The following pages of this document report on both the student and faculty evaluation of the Spring Academy, describe and evaluate the new curriculum blocks and make recommendations on the next steps in Academy metamorphosis.

STUDENT EVALUATION

The student evaluation revealed high interest in practical engagement and focused activities such as the consult lab, Uptown workday, the Cabaret, the Ball, pedagogy tutorials and the Odyssey. Wherever physical effort in transforming space or total corporate effort was the emphasis, students saw these as key events. Working toward a finished product or practical tools, increased self-investment and therefore rated high in the evaluation. There was also keen interest in media in the form of slides, movies and graphic first-hand descriptions of the work of the three campaigns. Pedagogy was seen as powerful because it pushed the depth struggle and journed people through the series of the four tutorials. Courses which rated high included the Individual and the Family, Community Development Philosophy, Psychology and Art and Leadership Methods III which dealt with corporateness and priorship. Courses were rated strong when they called for a change in individual relationships to social structures or were geared to practical methods. Weak-rated courses included both Old and New Testament, Science and Philosophy and Nation and World. Courses which students summarized as weak were also the most controversial. Ecclesiola evaluation comments centered on the mood and flow. For the most part students felt Ecclesiola was too somber, and recommended a more relaxed and informal mood. The seminary games on the New Religious Mode were helpful. Kazantzakis was also helpful but difficult to get internalized. Team life focused on practical care and enablement. Charting the day during team meetings was experienced as not quite appropriate. The solitary exercise of charting the day could be more effectively used.

THE JOURNEY OF THE EIGHT WEEKS: FACULTY REFLECTION

The mood of the first week was one of being dazed and overwhelmed while trying to get one's bearings. CS-I and the Theological Revolution came as a frontal assault that left participants reeling with the questions of why they had come and how they could possibly make it through eight weeks. As a group they came as people in transition with few roots in any particular community and unclear vocational options. The mood was very serious and somewhat guarded.

Week two and the emphasis on sociology pushed the mood lower and the social came as unrelieved and burdensome. Although there was serious involvement in the workshops and the GCF Lab, particularly the Uptown Survey, the struggle to push beyond the tiredness of week one was difficult. The play, Bloodknot, intensified the struggle to keep awake because of its content and length. There was little relief or sense of celebration at the close of this week.

Week three was marked throughout by anxiety over pedagogy and the struggle to stay conscious to the journey. An onset of minor illnesses struck this week. But by the end of the week Psychology and Art and the Pedagogy Tutorial had the students excited about their own creative abilities and the power of RS-I as the tool to push into the spirit deeps.

Week four struggled in the New Testament arena with appropriating the historical church as part of their heritage. Participants for the most part saw themselves removed from the context of the church. Many participants came from backgrounds deeply scarred by experiences in the historical church. The mood was very uneven during this week with the building of motivity in preparation for the Cabaret, with the arrival of new participants and the wrestling with decisions to stay out the eight weeks or not. The Cabaret and Primordial Humanness provided a climax to the week. The authentic celebration of the Cabaret gave participants their first look at themselves on the journey.

The rhythm of week five was a return to a more traditional and familiar pattern. The mood of settling in combined with a high level of engagement in Leadership Method II was refreshing. They began to see that RS-I pervaded every part of the curriculum, as a life dynamic rather than merely a course. Week 5 Pedagogy was a struggle of pushing beyond and seeing through the dynamic to the depths.

Week six was a high week of intensified engagement. The Consult mood was one of great seriousness and pushed individual productivity as teams came together in a new style of corporateness. Plenary sessions allowed corporate consensus to emerge and participants stayed up far into the night to finish their work. Through long hours and fatigue the corporate work of the plenaries pushed practical methodologies to the bottom and participants experienced the consult. Setting up the Ball was a hard push with very little break between the consult and the Ball. The waltz held the symbol of dancing over the chaos and the struggle to celebrate in the midst of exhaustion.

Week seven was the same kind of baulking over the Old Testament as was experienced with the New Testament. There was great intrigue with Leadership Methods III and the practical issues of corporateness. The work day provided the hard miracle day which powerfully demonstrated corporateness. The movie, The Seven Faces of Dr. Lao, was on target in terms of putting imaginal content on leadership style. The struggle with week 7 Pedagogy was on adequately grounding the method and style of the pedagogue.

Week 8 wove the powerful images of the three Campaigns while raising the vocational issue relative to the family in mission. The struggle of participants was in terms of giving personal form to the decision to engage in the Spirit Movement. A "Yes" was said to the adventure of the Odyssey and the mood was a kind of shock in discovering themselves having given a yes to something so radically different. The Odyssey was the high event of the Academy--a no-holds-barred stretch of three days with total participation. The participants deeply appreciated the push to work through their journey and timeline for the future. Beginning the week with the social--The Individual and Family--and ending with the solitary work of the Odyssey was on target. The struggle that my vocation is my life came through loud and clear. The conversations on the Gospel of John came as story rather than scripture and were grounded sociologically very quickly. The sense of being in charge of the time design and the mood of being almost in the home stretch released a kind of risk to reflect to a degree not witnessed throughout the previous 7 weeks. Participants emerged from the Odyssey having a series of tactics for taking the next step and staying in the struggle.

The Evaluation of
THE THEOLOGICAL REVOLUTION

Thursday		Friday				Saturday		Sunday	
METHOD		SYMBOLS				SOLITARY REFLECTION			
Philosophy of Imaginal Educat'n	Tools of Imaginal Educat'n	The ? of God	The Christ Event	The Holy Spirit	Requiem for a Heavy-weight	The Church	Mission of the Congregation	Symbolic Life	Global Spirit Movement
Boulding The Image	Four level charting	Bultmann Crisis of Faith	Tillich You Are Accepted	Bonhoeffer Freedom	Movie Conversation	Niebuhr Church as Soc. Pioneer	Workshop: Social Engmt	Symbol Creation	Spirit Care

Description: The courses on the Theological Revolution and the Cultural Revolution in week one both focussed on orientation and context for the next seven weeks. The course is designed in ten sessions with three distinct sections. The first two sessions on imaginal education build a context for the pedagogical method and presuppositions of the eight weeks as well as giving depth experience in and individual aid with the charting study method. The next five sessions are a demonstrations RS-I course with the conversations and daily office. This not only catalyzes awakenment but equips students with models, illustrations and notes toward later participation in three Pedagogy Tutorials. The last three sessions of this course are more reflective, focused toward the next seven weeks. Students meet in Ecclesiola configurations rather than seminar groups and write the first of three statements on their historical vocation and create songs, symbols and rituals for their teams. The sessions offer the first orientation for the solitary office and an opportunity to intentionalize their participation in the remainder of the Academy.

Impact: The Theological Revolution course was powerful. People were impacted by its intentionality and the demand for self-conscious care. The power of symbols came as a practical address both in terms of the wisdom of the old and the need to create new symbols to mark new consciousness. A foundational sort of corporateness was forged as the students experienced and shared common struggles in RS-I, celebrated new power in team symbol creation and accepted the solitary demand to take responsibility for the whole program. The mood of the course was experienced as a tension between surprise and appreciation over the depth of the curriculum, and restlessness over the issues of vocation.

Evaluation: The strengths in this course lay in the work with symbols, the imaginal education context, the new edges in RS-I (particularly Bonhoeffer) and the odyssey-like solitary reflection on the other side of the RS-I course. The weaknesses of the course centered around the cumbersome flow and orchestration of the three parts, particularly in relationship to time design and unifying image. The limited treatment of imaginal education, the questionable appropriateness of the RS-IIIA frame in terms of the existential aims of this course, and the clumsiness of some the workshop procedures. Suggestions for the next Academy include expanding imaginal education to four sessions, moving the RS-IIIA content to the People of God collegium series, designing spins rather than lectures for the last three sessions, re-doing the break times and re-gestaltng the last three workshops.

The Evaluation of
GLOBAL COMMUNITY FORUM LAB

Thursday			Friday			Saturday	
TRAINING IN SET-UP			TRAINING IN ORCHESTRATION			THE TOWN MEETING	
Lect.	PROFOUND AWAKENMENT	X	DYNAMICS OF T.M.	X	SUSTAINING FRAMEWORK OF T.M.	THE NEW WORLD	THE NEW HUMAN
Workshop	UPTOWN SURVEY	FRAMING AND TARGETING	CONSULTANT STEERING COMMITTEE	ORCHESTRATION WORKSHOPPING	TOWN MEETING PREPARATION	CHALLENGES	PROPOSALS

Description: The Lab began with a contextual lecture on Profound Awakening and a geo-social analysis trek into Uptown 5 to expose the participants to an actual community and provide data for the workshops. The Trek began with a contextual statement on the Uptown situation. The students were divided into five research teams and spent two hours in the community. This was followed by a corporate plenary to gather the data. The afternoon workshop was on framing a community and catalyzing a "yes" decision for the day by creating and role playing pitches. On Friday morning the lecture on the dynamics of the Town Meeting day was followed by a workshop on the role of the consultant and the practices of steering committee actuation. The afternoon workshop was concerned with familiarizing students with the two spins and the procedures for the workshops. Each built their own spins and workshop plans. The Sustaining Framework lecture on Friday evening was on spirit undergirding of the day. The remainder of the evening was preparation for the Town Meeting on Saturday. Part of the student body was engaged in workshop training by an assigned orchestrator while the remainder recreated the space and decor. Saturday was the Town Meeting. It was followed by reflection, evaluation and questions led by the Orchestrators. Saturday evening was the first all-Academy celebration.

Impact: As one would expect, the address of the Lab was the Town Meeting. The students experienced themselves as residents of the community and took the day very seriously. Most of the workshop leaders had never led workshops before and appreciated the firsthand training. The high points of the first part of the Lab were the pitch creation, the steering committee work and the opportunity to become familiar with the workshops of the TM. The TM document reflected an affirmation of Uptown and a grasp of the methodology. Reflection with the Orchestrators after the TM clarified the method and catalyzed new decisions to become engaged in the Campaign locally.

Evaluation: Essentially the GCF Lab is a very strong course. The workshops need simplification and more focus on Orchestration and consultation since participants are more likely to find themselves playing these roles. The Lab needs to employ more imaginal tools to convey the dynamics and intent of the Campaign e.g. GCF slideshows and advertising gimmicks. The placement of the TM is a question: some felt it should precede the Lab workshops, while others felt that the end of the Lab provided a culminating focus for the workshops. A greater emphasis can be placed on the global scope of the Campaign either in the Lab lectures or in the morning collegium series of that week.

Future Directions: A number of comments before and after the Lab expressed the need

for such a training Bab in the regions themselves. As it presently stands, the course could be easily adapted to the training needs of any particular area or region. Many of the house priors are interested in this type of training experience for increasing the effectivity of their local troops in doing the GCF Campaign. More time to deal with the Campaign in the curriculum is indicated: maybe a week-long emphasis to correspond to the Consult Methods Lab week6. Actual field experience could be included in this such as deployment of participants to maneuvers in the Chicago Region, work with the GCF post, attendance at Area Chicago weekend TMs, etc.

The Evaluation of
LEADERSHIP METHODS I

Thursday		Friday		
SEMINAR PLANNING		LECTURE PREPARATION		
Lec.	SEMINAR PLANNING	CLASSROOM DYNAMICS	LECTURE BUILDING	LECTURE PRESENTATION
Workshop	TILLICH: FOUR-LEVEL CHARTING AND SEMINAR LAYOUT	TILLICH 3/4 LESSON PLAN MOVEMENT III	CHRIST LECTURE SENTENCES AND ILLUSTRATIONS	PEDAGOGY ORIENTATION

Description: In Leadership Methods I students did their first work in creating seminar lesson plans and lectures. They spent two sessions building the seminar plan and two sessions creating a lecture. The Christ section of RS-I was used as the content for this work. They took a chart of Tillich with the topical and functional titles and completed the propositional sentences, then corporately decided the rational objectives and existential aims for the whole seminar and each of the three movements. Emphasis was placed on Movement III paragraph 12. They discerned the key points and wrote key questions series. For the Christ lecture, students listed classical and personal illustrations, using a page of brooding questions to elicit their own experiences. They also wrote rational sentences to hold the dynamic of the lecture.

Impact: This course provides direct prowess in seminar and lecture preparation. It both overwhelms the students with the depth work necessary before seminars and lectures are presented and gives them practical tools to be used in any teaching situation. It is foundational to the first Pedagogy week end that follows immediately. Students are directly engaged in the Lab because they know they will be presenting lectures and seminars in the following two days and again in the fifth and seventh weeks.

Evaluation: Leadership Methods I is correctly and powerfully placed just before the first Pedagogy Tutorial. It is necessary to do both lecture and seminar preparation before that weekend. Focusing on just one movement of the seminar for key points and questions allowed more depth work to be done. The third lecture on Lecture Building impacted students with the comprehensiveness of the methodology and the image that a lecture has only on primary thrust, but several approaches.

Future Directions: For the future direction of this course, it is suggested that students begin it already knowing which of the four sections they will be teaching that weekend and do their preparation for that particular section, or that two courses be run simultaneously, one dealing with seminar preparation and one with lecture preparation. Additional tools to be developed are: one page step by step procedure sheets for lecture building and seminar planning, questions for individual brooding on illustrative experiences for God, Holy Spirit and Church, and a worksheet of the rational objectives and existential aims of each section of RS-I;

The Evaluation of
LEADERSHIP METHODS II

		Thursday		Friday	
		WORKSHOPPING		MODEL BUILDING	
Lec.	THE WORKSHOP SYMPHONY	WORKSHOPPING METHOD AND STYLE		MODEL BUILDING METHODS	PRINCIPLES OF TRANSRATIONALITY
Workshop	DESIGNING THE WORKSHOP FLOW	WRITING WORKSHOP PROCEDURES		BUILDING EFFECTIVE MODELS	TRANSRATIONAL DESIGNS AND OPERATION

Description: Leadership Methods II is a practical methods course that provides methods prowess in the arenas of workshop design and effective model building and actuation through indicative battleplanning. Students took three different issue situations and created overall workshop symphonies and procedures to deal with them. The sessions on indicative battleplanning took one situation, went through the process quickly to the final stage of implementaries, transrational chart and timelining.

Impact: This course impacted the student primarily because of the direct applicability in their own daily situation. They experienced methods for focusing the wisdom of a group on a particular issue and the ways to deal with larger issues. They began to sense the transrationality of movement and Academy designs they were familiar with.

Evaluation: Leadership Methods II is directly related to the methods the students participate in and use during the following week on community development and the consult lab. The lectures are practical and imaginal, though they need refinement to eliminate unhelpful repetition. The students' participation in this course was very intense. The first and third workshops are too full for the allotted time.

Future Directions: This course needs its rational objectives and existential aims concretized. Actuation needs greater emphasis by building tactics that could be implemented in work blitzes the following day. Students need guidance on selecting specific gestalt methods appropriate to the context. The section on model-building and transrationality could be done during Community Development Philosophy and the Consult Methods Lab the following week.

the evaluation of
COMMUNITY DEVELOPMENT PHILOSOPHY

Monday			Tuesday	
THE GLOBAL TRENDS			THE GLOBAL STRATEGIES	
Lec.	Primal Community	Vision/ Contradiction	Elements of Reconstruction	Proposals/ Tactics
Workshops	OPERATING	UNDERLYING	PRACTICAL	TACTICAL
	VISION	CONTRADICTIONS	PROPOSALS	SYSTEMS
	CROSS-GESTALT	CROSS-GESTALT	CROSS-CESTALT	CROSS-GESTALT

Description: This course is located in week 6--a time totally given to community development. The course on the Philosophy of Community Development is a pioneering step to create an academic discipline on this topic using the documents and experience from 24 Human Development Projects. The opening lecture on Primal Community is an ontological grounding of a geographical community in history. The following workshop uses the operating vision charts from HDPs and gesticates the vision on the model of the Fifth City operating vision. On Monday afternoon a lecture on Vision and Contradictions discernment was followed by a gesticating session in which the contradictions from 18 GSDs were gesticated into an overall chart: representing the global blocks to the development of local settlement. Tuesday morning began with a lecture on the task of reconstructing a local community in two years. It was followed by a workshop which gesticated proposals from seven representative HDPs into economic, political, wisdom, style and symbol and arranged them in a transrational chart. In the afternoon the dynamics of Proposals and Tactics were presented then the students took all the tactics from the same seven HDPs and gesticated them into another transrationalized chart.

Impact: The staff had anticipated the workshops of this course would be somewhat mechanistic and repetitive, but such was not the case. Both teachers and students found themselves sucked into the process of collecting and clumping large masses of nitty-gritty local data off the charts and found the process of transrationalizing the complexity into new charts with beauty and power a tremendously rewarding experience. Part of the impact of the course was seeing the commonality in the needs of widely differing communities and having their own idealism about community continually confronted by ditches, clean-up campaigns and chicken coops. This proved to be a powerful course in indirectly grounding the moral issue all over again.

Evaluation: This was rated by the students as a very successful course. Perhaps more use could be made in the future of studying one or more complete documents as textbooks on the subject. The preparation offered by this course for the following Uptown Consult Lab was a key to being able to do a consult in four days. Close work on HDP document charts meant that the students had vivid images of well-stated visions, contradictions, proposals and tactics and had clear pictures of the end products for each session of the consult.

The Evaluation of
the
CONSULT

VISION & CONTRADICTIONS		PROPOSALS & TACTICS	
Wednesday	Thursday	Friday	Saturday
UPTOWN RESEARCH TREK	OPERATING VISION PLENARY	RESOLUTIONS WORKSHOP	TACTICS PLENARY
	DETERRENTS WORKSHOP	PROPOSALS PLENARY	SUB-TACTICS WORKSHOP
PROBLEMATICS WORKSHOP	CONTRADICTION PLENARY	TACTICS WORKSHOP	

Description: The Consult Methods Lab began with a morning research trek into the Uptown 5 area following a brief contextual spin. The participants were divided into four teams: education, commerce, style and services. Throughout the Lab the leadership of the teams was Academy participants--two per team with one staff. The dynamics of the Lab were comparable to a standard GSD consult: workshops, plenaries and plenary charts. There was time for only one community survey and there were no community residents participating (with the exception of two who were full-time Academy students), but from the point of view of a training event this was not a block. Leaders were trained by the faculty in preparation for each new workshop. The staff led the plenaries and co-ordinated and produced student work. In their workshops the teams refined the plenary charts and wrote holding paragraphs. At the closing plenary the document of the Consult was present to each team member, and students reflected on and evaluated the Lab. Only brief work was done on sub-tactics and implementaries during early Saturday afternoon since the rest of the day was for Ball preparation.

Impact: The impact of the Lab was great: it intensified corporate discipline, pushed individual creativity, allowed the experience of working late into the night and demanded clear, insightful writing. Student leadership was demanded to flower on the spot. Students were required to push beyond liberal idealism and goal-oriented solutions towards comprehensive, contradictional thinking. Methodological and tactical prowess got grounded for the students powerfully.

Evaluation: The Consult Methods Lab was the strongest curriculum block in the Academy. The procedures manual and student leadership meant that the Lab was a real training experience. The preceding course on Community Development Philoso-

phy proved to be fine preparation. Further work is needed to provide more time for surveying the community in order to provide more solid data. To enable this the Wednesday survey needs careful preparation to ensure that teams get good-quality data. Some participation by the Uptown guild and post would be a way to ensure the community is represented. Shorter plenaries would allow more time for team workshops and a more consistent time rhythm throughout the Lab. Procedures can be sharpened, and reflective time allowed after each workshop and plenary to clarify the methodology. The final workshop should include work on subtactics. We should make sure that implementaries are dealt with in another part of the curriculum.

Future Directions: The value of the Consult Lab as a training tool is high. It could be used as an orientation course for consultants and future local auxiliaries as well as local training toward GSD replication. It could also be used by local communities to actualize proposals coming out of Town Meetings. This Academy demonstrated a useful point: it is possible to write a Consult document at the same time as doing the consult.

The Evaluation of
LEADERSHIP METHODS III

Thursday		Friday		
METHODS OF CORPORATENESS		METHODS OF PRIORSHIP		
Lec.	PRINCIPLES OF CORPORATENESS	THE XAVIER PRINCIPLE	DYNAMICS OF PRIORSHIP	CATALYSING EFFECTIVE ACTION
Workshop	DEFINITUDES OF CORPORATENESS	THE LIBERAL HERESY	THE PRACTICS OF PRIORSHIP	THE SEVEN FACES OF Dr. LAO: MOVIE CONVERSATION

Description: Leadership Methods III offers a context for movement priorship. It grounds students in the operating mode of authentic corporateness in session one, the product of which is a short document on "Corporateness is". Thursday afternoon begins with a lecture on the Xavier principle followed by a seminar on the Liberal Heresy from "Estimates." Friday morning outlines the role of authentic priorship, and workshops events for accosioning that journey. Using poetry from the "Saint" Sun Tzu, the Hunter Warrior and Chuang Tzu, students gestalt the qualities of priorship as manifested in several different contexts. After a lecture on priorship as catalyzing effective action, the movie "The Seven Faces of Dr. Lao" is used to ground the work of the other sessions.

Impact: This course was popular with the students and ranked as one of the four strongest. Students were impacted by the profundity of priorship and wrestled deeply with the decision to play this role. The movie grounded the tactical acting out of care in a community and acted as a subtle mirror for manifestations of the liberal heresy.

Evaluation: The strength of the course lay in the timelines of the issues and using several different ways of coming at the topic. Weaknesses were noticed in workshop procedures which need more finesse. The movie conversation needs to emphasize the contradictional and tactical approach of Dr. Lao and his "magic" scenarios need some demythologizing so that the address of some of his tactics is not lost.

Future Directions: The next steps with this course would expand the curriculum to include song-leading methods, conversation leadership and role plays. The liberal heresy lesson plan needs re-orchestration to empower its specific address.

the evaluation of

NEW COLLEGIUMS

Monday	Tuesday	Wednesday	Thursday	Friday
Week 2 DYNAMICAL SOCIOLOGY				
Ideology and the Moral Issue	The Pressure Points	The Whistle Points	The Ontological Pillars	Guest Speaker: OK 100
Week 4 THE PEOPLE OF GOD				
The People of God	Parish Congregation and Cadre	Awakenment Engagement and Plentitude	(The two lectures here belong to a series on Contentless Christianity.)	
Week 6 LOCAL COMMUNITY DEVELOPMENT				
Revolutionary Action	Socio-Economic Principles	Actuation Principles	Replication Method	H.D.P. Slide-Show
Week 8 THE GLOBAL CAMPAIGNS				
G.C.F.	G.S.D.	I.G.M.	(Odyssey)	

Description: The morning collegiums offer a broad spectrum of social and spirit maps of the movement and have always been an enlivening feature of the day for the whole body. This quarter four new collegium arrangements were experimented with in weeks 2, 4, 6, and 8. (see above). All these lectures were sociological and alternated with series on spirit method dealing with the Solitaries, Corporates, the Other World and the Holy Life. The sociological lectures were designed on the one hand as a memory bank of social wisdom on rebuilding society and on the other hand as a report on the edge of current work.

Impact: Where these social lectures corresponded with a week-long emphasis on the social (weeks 2 and 6) the impact was over-powering--some would say unhelpfully overwhelming. Imagine a week of Dynamical Sociology over breakfast, Nation and World on Monday and Tuesday, gridding the world on Wednesday, GCF Lab on Thursday and Friday and Town Meeting on Saturday. Or in week 6 imagine a series on Local Community Development for breakfast, The Philosophy of Community Development on Monday and Tuesday and doing a consult on Uptown on Thursday, Friday and Saturday. Students experienced themselves drenched with the social and over-against the moral issue for two whole weeks of the Academy. These were powerful weeks. In the eighth week doing the 3 Campaigns in a row with 3 guest speakers was a strong feature, especially as a movemental context for the CS-III course and the Odyssey. Having these done by guest speakers intimately invloved the students in the edge of these programs.

Evaluation: Part of the effectiveness of these 4 series was in holding students over-against maps of social reality, demonstrating the transforming depth of revolutionary action, communicating the "how tos" of community development (especially

when done by staff and guests with locally grounded experience) and allowing the students propensity for self-actualization to be put into perspective by the concrete needs of three billion people and 2½ million local communities. The talks that were followed by student questions and discussion made for a fine collegium experience. The rhythm of unrelieved sociality buttressed by the collegium series was not always helpful to the mood. The readiness of some students to engage was low at times. Where media were used they were surprisingly powerful. Lectures should probably be shorter to allow more time for questions and comments. The impact of some collegiums depended too much on who did them. They need more structural under-pinning in 4x4s and back-up material.

Future Directions: The alternation of social and spirit collegiums week by week is helpful but the solidly social weeks may need a different feel to the collegiums. Slideshows, GSD movies, videotapes and large photos would be enlivening. The People of God series placement is right but the series does not quite hang together. The 3 Campaign collegiums in the 8th week is right on target and the guest speakers for these 3 were great. Choosing guest speakers for both the Friday collegiums, the Campaign talks and possibly also for the series on Local Community Development is an issue. This quarter we were very fortunate in having fine speakers in terms of mood, grounding, specific field experience in their arena and readiness to honor the student body. In general the talks all need to be shorter (30-40 minutes) to allow time for discussion or a short workshop.

SPECIFIC SUGGESTIONS

In addition to specific suggestions relative to the new curriculum blocks, following are recommendations for other arenas of the Academy curriculum and construct not yet touched on.

1. Pedagogy. The four pedagogy weekends need a more careful journey map with specific push rationales for each weekend, both for the body as a whole and for each individual. The faculty in training need a separate staff pedagogy session on each of these week IIs. Consideration should be given to publishing student pedagogy assignments before the preceding methods course so that the course can be oriented to in-depth weekend preparation. The Friday evening study session could have a longer faculty briefing of each group with possibly a study hall following for individual work.

2. Celebrations. Global replicability and flexibility are values that need more consideration in the rationale for the four major celebrations: the Play, the Cabaret, the Grand Ball and the Dinner Dance. The selection of the play for the second week celebration is of major importance for the mood of weeks 3 and 4. The theme needs more relationship to the style of resurrection. The replicability and spirit edge of the Cabaret are issues if the Academy is to go on the road. There needs to be a flexible readiness to switch from a standard celebration in favor of a major current outside event.

3. Ecclesiola. The Ecclesiola needs to be more of a dinner time event, shorter and faster paced, to allow for another training event afterward. Composition should be at least 25 people. The number of Luke and Psalm conversations could be decreased in favor of more work on the Other World, the Dark Night of the Soul and the Long March of Care. A more relaxed collegial feel is needed to ensure that Ecclesiola is discontinuous from the academic work. The NRM grounding comes off better through games than through guided workshopping. Widespread and varying responses to sodality constructs may indicate that this dynamic may be better held symbolically rather than by more workshop style conversations. Lots of good singing, a fine meal, a 15 minute conversation, a 45 minute seminary and a 2 minute sodality and send out may be more what is needed--say a 6:30 to 8:00 p.m. construct, leaving time for another training event afterwards, which would offer a more active sodality effect.

4. Teams. The team structure needs to pervade all operations in the Academy and be more than an enablement force. More academic projects involving team work need consideration. The lunch time team meeting has to become more of an event where the team is trained in corporatenss and reflects as a team on its training edge as well as on its day to day practics of operation.

5. Collegiums. Although collegiums have been treated elsewhere, some additional comments are in order. General comments pointed to the need for a series on the Touchstones of Humanness. The series on Local Community Development needs a solid media backup and where possible lectures done by guest speakers for GSD. The week 7 Holy Life series comes too late--week 5 would be a good time for it. The development pitch in week 8 is best done as a morning collegium before the CSIIIA budget workshop, not immediately after it! The lectures on the NRM need to intentionally combine rational exposition with spirit explosion.

6. One Day Wonder. The Academy wonder structure has developed into a small routine Nexus back up operation and lost its impact value. Fewer, longer, public workdays with an impossible load of work to do, well contexted and planned for and with more reflection would give this event back its power, and be a real priorship push on participants.

7. Work Days. The most impactful work days have one major task, executed miracle-wise, requiring hard physical labor and student planning—an exercise in actuation and corporate power. The Uptown Beautification work day in week 7 was a model for this kind of operation.

8. Manuals. The accreditation manual, the student manual, the faculty manual the solitary journey manual, ecclesiola manual and song book all need updating, regestalting and compacting in preparation for putting the Academy on wheels and providing less weight of paper. The Academy faculty manual could be produced in a ring back binder with lesson plans of only 3 pages instead of 7, with complete lecture up-dated 4x4s, illustrations and a copy of all working formats.

9. Other Courses. A focus for each week should be part of thinking through metamorphosis. Our stance towards Church History, Old Testament and New Testament is ambivalent. A specific historical course is needed to ground the ancient, medieval and modern paradigm. The Ur Images course needs a way to drop the bottom out of it with more of a lab, workshop or seance feel to the seminars. The Old Testament would benefit from redoing or re-consensing on the Anderson and Napier lesson plans. Four-day courses do not seem to be helpful except perhaps for the Consult Lab. Sanctification needs a whole course devoted to it. Corporate reflection is needed after the Art Museum visit to bleed out its residue in a plenary session.

10. Symbolic Life. Our stance towards daily office for the participants is ambivalent. Whatever the first event of the day is, it needs to begin with a bang, not a whimper.

BROAD DIRECTIONS

1. Time-Space: The future Academy will be more intense, its momentum more accelerated. It may need to be shorter than eight weeks--either 5 weeks or 6 weeks long and open to students coming in for shorter periods for specific training, while ensuring the presence of a solid core to act as glue for its duration. The Academy on wheels could find ready participants for a once-a-year program in Africa, Australia, Europe, Latin America, and India, as well as the areas of North America.
2. The Address: The profound address of the Academy needs to be more on the possibility pole of the Word. We need to find the way to push students beyond every single limit they have ever placed on themselves. This means that each major item of the curriculum comes to the students as something they have never done before, with less emphasis on the predictable routine of running a program and more emphasis on doing a series of tactical cobra strikes on the students while still maintaining the transrationality of the program.
3. Functional Eptitude: The whole curriculum needs to be taught as life method. There will probably be fewer and shorter seminars, more workshops, shorter lectures and more discussion to allow the radicalization of basic method. An intense leadership push can be accelerated by more student leadership roles, not for the sake of "student participation" but in order to provide more and more opportunities for pushing students beyond their established limits and experiencing themselves as Mission Now. Battleplanning can be pushed to immediate actuation, providing ways to do training in implementation to complement training in planning. PSU training dealing with real issues, with real solutions that can be implemented by students should be in the curriculum. Special training events could be held most nights after Ecclesiola.
4. General Staff School: In the past the climax of the Academy has been the triggering or clarification of a major vocational decision. Perhaps the new Academy will be able to assume a basic vocational decision allowing it to drill the troops in effective methodology while still maintaining depth and integrity in the journey of the spirit. A good proportion of old movement and new order in both the student body and the faculty will be needed to glue the boot camp dynamics together. Giving students more opportunities for priorship, leading conversations, doing maneuvers, ensuring products from all work and actual participation in the Campaigns than one day events could produce this kind of feel.
5. Courses: The trend in the curriculum is for more labs and workshops, fewer "courses" and seminars, with fewer paragraphs allowing a greater depth push in the seminars. Perhaps Church History, New Testament and Old Testament could be combined in an Odyssey type of construct. The existential address of the courses needs precise location over-against the specific body of students and the course or lab taught more tactically and less programmatically. Perhaps every single course, lab or event needs methodological orientation and ways found not simply to introduce participants to a method, but to drill them in it through night time or team tutorials. More use of media would enliven the social methods courses and put more imaginal power into a course like Science and Philosophy.
6. Secular-Religious: The Academy of the future may be less overtly "religious" and more secular in its language, courses and mythology. The Hunter-Warrior myth, Don Juan, Lao Tzu, and other poetry from the universal religious needs treatment to allow open dialogue on the cruciality of overtly religious language and a place for other self-consciously religious aspects to come together. RS-I could be approached through engagement to give form to the impact experience.

7. Student Creativity. From many different directions ways need to be found to elicit the responsible creativity of students. Poetry and song writing, keeping a weekly journal, maintaining an Academy course notebook using a note-taking methodology, individual model-building, decor creation, document creation and Iron Man mythology can all be included in either the formal or informal curriculum. Perhaps every single item in the curriculum needs a finished product to sustain motivated engagement and to ensure a lasting residue from each course.

8. The Faculty. The faculty of the Academy needs to be more international in scope and training, more contradiction-oriented over-against the enemy. Fewer faculty per student are needed and more ongoing faculty training. Staff sessions need finely tuned spirit analysis, and teaching needs to aim more at the spirit and operational contradictions--the difference between doing tactics and the routine teaching of a program. Team teaching will play a much bigger role. The faculty needs old hands with a mixture of Campaign field experience and a passion for common memory. Every faculty needs a trainee-section whose pedagogical prowess is pushed through daily evaluation and regular week II faculty pedagogy. The depth of the curriculum needs sharpening by clarifying the rational objectives and existential aims week by week and session by session. The faculty can strategize at every staff meeting on the journey of the spirit and the journey to functional aptitude of each participant and of the student body as a whole.

Academy
Post

TOWARDS DISCERNING CURRENT TRAINING NEEDS

Quarter III
1977, Week 3

PRIORSHIP PROWESS	CAMPAIGN EXPERTISE	LOCAL EFFECTIVENESS	ACTUATIONAL SKILLS
Eliciting effective engagement	Making effective assignments	Viewing comprehensively/ind.	Trusting workable methods
Dealing with complexity	Ensuring flexible operations	Focusing primary contradiction	Sharing complexity simply
Forging integrational models	Executing local maneuvers	Journeying corporate body	Discerning new contradictions
Building translational models	Hitting a town	Forging repository methods	Employing contradiction analysis
Training movement generals	Consulting for GCF	Applying local economics	Modifying tactical plans
Internalizing corp. discipline	Consulting for GSD	Creating relevant decor	Discerning "cobra strikes"
Concretizing Xavier stance	Initiating follow up	Internalizing RSI method	Learning effective prioritizing
Recovering common memory	Circuiting the metro	Training R.H. interns	Training guild leadership
Standing effectively solitary	Enlisting new troops	Conducting accty/absolution	Equipping skilled tacticians
Taking care of oneself	Training fund raisers	Inkinding needed goods	Focusing specific expertise
Utilizing indirectness skillfully	Arranging passports/visas	Extending comity relations	Learning accounting procedures
Internalizing common methods	Obtaining establishment outh.	Refocusing new task	Utilizing visual media
Discerning group consensus	Becoming developers/funders	Grounding theological category	Designing slide shows
Inducing methodological prowess	Training intentional shadows	Practicalizing urban living	Providing applicable training
Catalyzing Tao sensitivity			Reflecting on engagement

THE ACADEMY IMPORT

The dynamics of effective training are finally grounded in the human journey itself. In the knowing dimension of life, everyman needs the master pictures of reality, the interpretive images and screens which make sense out of his experience, and the models which allow a creative response to what is happening. This is the intellectual base. In the doing dimension of life, everyman needs highly practical ways to focus his observation, to discern the depth issues of any situation to bring effective action to bear on them, and by reflection to glean the implications for the future. This is the practical base. In the being dimension of life, everyman needs basic skills and prohress in methods which will release creative engagement in the times. This is the operational base.

Although there are strong elements of all of these dynamics within the Academy curriculum, its primary focus has been the intellectual base and the operational base. In its inception the Academy was designed as an edge demonstration of a new style and form of 20th Century education, with a secondary emphasis and concern on training the movemental forces for missional engagement. In other words, the Academy stood on its own bottom as a radical educational experiment. The current trends in the ongoing development of the curriculum and the present work of the movement indicate that what may be needed is a formal training construct which will directly equip movemental leadership with the necessary paradigms, methodologies, contextual images and common memory in relation to the current concretions of the missional task. This would imply a more contentless construct into which new training constructs and courses could be plugged as they become necessary. This would be particularly true if the Academy is takenout "on the road," in relation to the varying training needs of the movement in different parts of the world. The key to this is maintaining global commonality in movement training schemes while at the same time allowing for special training emphases over-against the concretions of the local task.

The cruciality of formal training at this juncture of the movement's history cannot be over-emphasized. In a time of doing, the knowing and being dimensions of the task increase in importance for the sake of ensuring the profundity and effectivity of engagement.

SUMMER'77 TASKFORCE RECOMMENDATIONS

1. Redesigning of the Ecclesiola construct.
2. Sharpening and focusing the new curriculum blocks.
3. Designing a 5 week Academy construct.
4. Rethinking the celebration rationales.
5. New curriculum creation.
6. Focussing the rational objectives and existential aims of each particular part of the curriculum.
7. Preparation of the Academy for mobilization.
8. Creating a single faculty manual with all necessary constructs.
9. Designing Academy trek schedule recommendations.
10. Forging an actuation timeline for taking the Academy on the road.
11. Writing an Academy operations manual.
12. Building new recruitment models (especially with an eye toward mobilization).
13. Intentionalizing faculty training plans and rationales.
14. Re-designing transrational rhythm.
15. Creating construct secularization model.
16. Writing papers on the philosophy of social development for use in the curriculum.
17. Creating a series of Dark Night/ Long March games and workshops in relation to the NRM.
18. Creating a comprehensive student textbook.
19. Thinking through the over-all training design for the movement as a whole.
20. Creating an Academy media repository.

RETAIL STORE MANUAL FOR THE HUMAN DEVELOPMENT PROJECTS

December 1977

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Chicago, Illinois 60640

RETAIL STORE MANUAL

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CHICAGO

RETAIL STORE SET-UP AND OPERATIONS CHECKLIST
HDP MANAGEMENT SYSTEMS

	FEASIBILITY AND DESIGN	SET-UP AND INITIATION	PROFITABLE OPERATION	DIVERSIFICATION AND EXPANSION
M E R C H A N D I S I N G	<ol style="list-style-type: none"> 1. Survey community's merchandise needs 2. Evaluate retail potentials 3. Identify alternative product suppliers and delivery options 4. Project sales volume and cost of products 5. Estimate merchandise sales prices 	<ol style="list-style-type: none"> 1. Select suppliers and transportation 2. Establish merchandise prices 3. Determine inventory control procedures 4. Allocate shelf space 5. Customer returns 6. Begin advertising 7. Set grand opening 	<ol style="list-style-type: none"> 1. Establish re-order procedures 2. Initiate sales incentive scheme 3. Evaluate consumer feedback 4. Evaluate sales prices, margins and stock status 5. Update sales projections 	<ol style="list-style-type: none"> 1. Increase variety of products 2. Expand market area 3. Refurbish and expand floor space
O P E R A T I O N S	<ol style="list-style-type: none"> 1. Select store site 2. Research equipment needs 3. Determine utility needs 4. Investigate licensing and regulations 5. Determine insurance needs 	<ol style="list-style-type: none"> 1. Obtain location 2. Obtain equipment 3. Design space usage 4. Establish receiving and marking procedures 5. Establish security systems 6. Schedule maintenance and cleaning 	<ol style="list-style-type: none"> 1. Schedule stock rotation 2. Design quality control 3. Review space design 4. Estimate stock losses 5. Evaluate security system 	<ol style="list-style-type: none"> 1. Evaluate storage requirements 2. Evaluate space design 3. Evaluate equipment usage 4. Review new product requirements
F I N A N C E	<ol style="list-style-type: none"> 1. Define organization forms and registration requirements 2. Estimate equipment and facility costs and determine depreciation 3. Prepare pro forma financial statements 4. Discern break-even point 5. Determine cash requirements 6. Determine capital and loan requirements. 	<ol style="list-style-type: none"> 1. Update income and cost projections 2. Acquire financing 3. Establish bookkeeping system 4. Open a bank account 5. Initiate cash receipts processing system 6. Initiate cash disbursements processing system 7. Set up payroll records 8. Establish credit and collection terms and policies 9. Prepare initial financial statements 	<ol style="list-style-type: none"> 1. Begin loan repayment 2. Inventory control 3. Tax calendar 4. Prepare regular financial statements 5. Initiate management services 6. Update cash projections 	<ol style="list-style-type: none"> 1. Determine profit distribution 2. Determine expansion capital requirements 3. Obtain refinancing
P E R S O N N E	<ol style="list-style-type: none"> 1. Ascertain number of workers needed 2. Select a manager 3. Determine available workers' skills 4. Determine hours of operation 5. Check training resources 6. Determine salary patterns 	<ol style="list-style-type: none"> 1. Determine staffing pattern and assignments 2. Establish personnel policies 3. Initiate on-the-job training 4. Establish attendance records 5. Investigate alternative pay scheme 6. Create employee morale 	<ol style="list-style-type: none"> 1. Employee meetings 2. Time sheet analysis and payroll preparation 3. Personnel training 4. Review staffing patterns and personnel policies 5. Monitor performance standards 6. Hold profitability celebration 	<ol style="list-style-type: none"> 1. Hire supplemental staff 2. Offer staff salary increase 3. Hire branch manager

RETAIL MANUAL FOR THE HUMAN DEVELOPMENT PROJECTS
OF THE INSTITUTE OF CULTURAL AFFAIRS

INTRODUCTION

The Retail Store Manual is designed to give step-by-step instructions on how to proceed after the decision has been made to operate a retail store to the point of expansion. The journey of a store has been divided into four phases: Feasibility and Set-up, Set-up and Initiation, Profitable Operations, Expansion and Diversification. The length of time of each phase will vary according to the complexity of the merchandise selected and the local situation.

Within each phase, the four inter-related arenas have been dealt with as a separate unit. These arenas are Merchandising, Operations, Finance and Personnel. Most of the information is based on working with retail stores in the Human Development Projects during the first year of operation. Therefore, the data beyond the key outline items in the last two sections (Profitable Operations and Diversification and Expansion) is yet being created and will be expanded as the next twelve months progress.

The key insight from the experience of setting up stores in the first 24 Human Development Projects is that starting small, selling merchandise the community cannot obtain locally, using available facilities, and building up the store over a period of time is the most effective method of operation. For instance, rather than seeking large amounts of capital immediately or a sophisticated facility, the store can use the capital and equipment on hand or that can be obtained quickly in-kind to initiate the store.

THE FOUR PHASES

The Feasibility and Design Phase is the period in which a comprehensive analysis of all the arenas of the store is made to determine whether or not the plan will be profitable. In this phase the analysis and research is in the four arenas to evaluate (1) the market of customers the store will serve, (2) the facility required, (3) the type and amount of financing needed, and (4) the human resources and skills which will be engaged. Several feasibility studies may be necessary to explore all possibilities before deciding on the most profitable form for the store.

The Set-up and Initiation Phase is the period in which all the "pieces" of the store are located and put together. This includes (1) acquiring the merchandise, (2) setting up the facility with all the equipment in place, (3) acquiring the needed financing and setting up the cash flow and bookkeeping procedures, and (4) hiring the workers and setting up the employee relations system. During initiation all systems are begun, though not on a full scale, in order to discover problems which need to be worked through. During this phase the workable inventory control method, bookkeeping method and training scheme for employees are established. This phase is completed when all systems are in place for a profitable operation.

The Profitable Operation Phase occurs when workable systems for the store have been adjusted to eliminate the problems discerned during the initiation phase. These systems are then formalized into the long-term on-going

structures (1) providing merchandise which the customers want and need (2) controlling the stock so it is fresh, appealing and profitable (3) preparing financial statements that can be reviewed by an objective body (4) placing management positions totally as the responsibility of community resident(s). Becoming profitable involves refining the well established systems and pushing their capacity to obtain maximum effectivity. Profitability includes (1) intensifying merchandising (2) recycling the profits into the community (3) training employees to operate the total retail store without ICA assistance. Once the profitability of the store has been insured, it is time to move to expansion and diversification.

The Expansion and Diversification Phase involves both a feasibility study for the best type of expansion and the actual implementation of that expansion. This phase includes (1) diversifying and adding to the variety of merchandise, (2) upgrading the facility, (3) making investments, and (4) increasing the number of employees. There are three types of expansion. First is product diversification in which a product line already carried is expanded. For example, a store might add three or four new varieties of dry cereals to the line of cereals already stocked. Second is vertical acquisition in which a new product line is added. For example, a store might add basic cosmetics or acquire its own transport system. The third type is larger volume which is accomplished with additional shelves, refrigeration space and with diversification of employee training. In order to facilitate expansion the feasibility and design, set-up and initiation, and profitable operations steps will again need to be worked through in the arenas of merchandise, operations, finances and personnel in much the same way as in the original set-up of the store.

I. FEASIBILITY AND DESIGN: MERCHANDISING

1. Survey Community's Merchandise Needs

The object of a survey of the community's merchandising needs is to determine the types, quantities and prices of products that people would purchase locally if they were available. This information can be learned by a survey of local residents and by asking the following questions:

- (1) Who does the purchasing? How often? Where?
- (2) How much of which product does he buy?
- (3) What is he buying at an inconvenient place?
- (4) What do residents make special trips to buy?
- (5) What do residents want to buy, but can't? Why?
- (6) What improvements in products are desired?
- (7) What products are being bought from mobile vendors and at what price?
- (8) How frequent are the mobile vendors?

A common way to get this information is a questionnaire that is answered by 5-10% of the homes. Another type of survey is done by observing and recording what people bring back from shopping trips. A third way is to observe the inventories of stores in the nearest market center. This will give a good picture of what the store should stock and at what price. It is helpful to visit nearby communities to see which products they do and do not sell to the community.

Evaluate the survey by asking: what is the community buying, how frequently, from where? What is the community not buying and why? What are products the community would buy locally if they were available (daily items, bulk items)? Wholesalers are also good sources of information on the characteristics of the retail demand in the community. Finally, the best screen for what will sell in the store are local man's present buying patterns. These methods are helpful in deciding what products to sell, but they are not certain. Therefore, ordering initial small quantities is often helpful. For example, in the survey in Kwangyung Il it was learned that the people had to buy tools, hardware products and clothing in Jeju City and that they needed to sell locally grown produce, so a general store was started.

Insights

--Stocking necessary products which cannot be obtained locally provides the community with a necessary service.

--Carefully think through the impact on the total project before underpricing locally-run competitors on basic products that the store will also carry.

--Consideration will need to be given to holding the tension between what customers want and what they need for effective nutrition (i.e. junk food or nutritious food).

2. Evaluate Retail Potentials

The commerce guild, local auxiliary, and concerned businessmen need to be exposed to merchandising and purchasing experiences beyond the immediate vicinity of the community, thus, creating a new range of alternative options.

One method to evaluate retailing is a merchandising field trip. In preparation for this event, select a retail outlet in a nearby larger market center that illustrates successful retailing. Select another one that illustrates unsuccessful retailing as a contrast. Make arrangements in advance with the shopkeeper to receive a group of community people on a given day and hour suitable to the shopkeeper. With the unsuccessful retailer, walk through and observe the things going on and art form the observations later.

Before leaving the community, context the trip with the purpose, the location of the store, and the nature of the business that is being visited. Pre-assign one question for each person to ask the retailer from among, but not necessarily limited to, the following:

- (1) What variety of products are stocked?
- (2) How often does your stock turnover?
- (3) How do you decide to display merchandise?
- (4) How did you select this store site? What are the advantages of this location?
- (5) How do you decide the amount of shelf space for particular products?
- (6) What are your pricing and marketing values?
- (7) How do you prevent the stealing of store products from the shelves?
- (8) How do you decide sale days? What products do you put on sale? Why?
- (9) What is your advertising plan?
- (10) How do you create impulse buying (customers deciding to buy a product when they see)?
- (11) What are your housekeeping chores and who does them?
- (12) How do you control cash?
- (13) What do you do to keep employees working at their best?
- (14) How do you keep cash register shortages to a minimum?

Insights

--If the new store sells some of the products that others sell locally, it is good advertising to find a way to provide the customer the convenience of getting more products from one store.

--Identify the limitations of the competition that can be used as an advantage in the local retail store. How will this retail store satisfy the market in a way not already done by local competition? Is the quality, price, service and location advantage adequate to capture a good share of the market?

3. Identify Alternative Product Suppliers and Delivery Options

The selection of the initial suppliers needs to hold the tension between low prices, good delivery to the store, willingness to sell in small and split case quantities, selling on credit and accepting returned goods that do not sell. Low prices and small quantities are most important. Delivery should be as frequent as the store needs to provide fresh products for sale. For example, bakery and dairy products may require a daily delivery and other products, depending on the storage room available, may be delivered once or twice a week. Availability of alternate suppliers flexibility in quality and quantity. Wholesalers work in competition, so it is to the store's advantage to have more than one supplier.

Wholesale field trips may be conducted. The particular objective of this trip is to acquaint the guild, auxiliary and project businessmen with the sources of goods and supplies available to the community and observe the operations of a typical wholesaler. Pre-identify and select a number of wholesaler businesses to visit in the nearby city. Make arrangements with key wholesalers to receive the group and to explain their operations. Context the trip with the trip objective, and suggest the group identify products and types of products that might be purchased and sold in the community. Have the group note the differing prices and terms on merchandise that might be purchased and sold in the community. Have the group note the differing prices and terms quoted on the same products by several wholesalers. Have the group keep in mind this list of questions:

- (1) Which wholesalers handle the same products?
- (2) What are warehousing methods and the space design?
- (3) What are the variables that affect wholesale prices?
- (4) What is the place where the title of goods changes hands from wholesaler to retailer (this is known as the FOB point)?
- (5) What delivery schedules are possible for the community?
- (6) What credit terms do wholesalers extend?
- (7) What is the returned goods policy?
- (8) What is the procedure for returning defective merchandise?
- (9) Is there a consignment policy (products held by the store for a specific length of time and then returnable if unsold)?
- (10) What are the freight expenses?

Insights

--Operating information is learned from others in the same business.

4. Project Sales Volume and Cost of Products

There are at least two ways of estimating sales volume. Both should be used, and the resulting two figures averaged. The two ways are (1) per household cumulative and (2) per item cumulative. To project per household cumulative, go to some reputable wholesalers. Tell the wholesaler the number of family units in your market area and anything else they may ask about the kind of market (like size or age of family units). From this the wholesaler will be able to give the store an annual volume estimate based on average per household purchases in the area. To produce per item cumulative, estimate your monthly retail sales for each product line (as per the example) and then multiply total by 12 to get annual sales.

Average the two figures. This becomes your median annual sales projection. Multiply by .67 to estimate your minimum annual sales projection (2/3 of the projection) and by 1.5 to estimate your maximum annual sales projection (1½ times the projection). For example, if per household cumulative projects annual sales is USD 100,000 and per item cumulative projects annual sales is USD 120,000 the average is USD 110,000 and is the median annual sales. USD 100,000 multiplied by .67 equals USD 73,000 as the minimum annual sales projection and USD 110,000 multiplied by 1.5 equals USD 165,000 as the maximum annual sales projection.

Insights

--This estimate reduces the possibility of getting into an operation at first where sales volume will not support the operating expenses.

--The work of doing these estimates gives assistance in thinking through the inventory most likely to sell.

--This estimate is difficult but necessary.

Global Operations Centrum: Chicago		INVENTORY WORKSHEET SAMPLE			Retail Manual December 1977	
Items we will sell	Est. units bought by community per month	Est. units we will sell per month	Retail price per unit	Total retail sales per month	Cost price per unit	Our total cost per month
Canned Vegetables	1,000	500	.25	\$125	.20	\$100
Soups	1,000	500	.25	125	.20	100
Large Detergent	200	175	1.00	175	.80	140
Regular Detergent	50	50	.50	25	.40	20
Hand Soap	200	175	.30	53	.25	44
Liquid Dishwasher	100	75	1.00	75	.80	60
Cabbage	800	700	.75	525	.60	420
Lettuce	500	450	.75	338	.60	270
Tomatoes	1,800#	1,500#	.60	900	.50	750
Potatoes	2,400#	2,000#	1.10	2,200	.90	1,800
Carrots	1,500#	1,300#	.50	650	.40	520
Salt	250#	225#	1.00	225	.75	170
Pepper	125	100	1.05	105	.80	80
Sugar	1,500#	1,300#	1.25	1,625	1.00	1,300
Flour	3,000#	2,500#	1.05	2,625	.80	2,000
Soft Drinks	4,500	4,000	.25	1,000	.15	600
Coffee	200#	175#	3.00	525	2.50	433
Tea	500#	400#	1.25	500	1.00	400
Canned Meats	1,000	500	.25	125	.20	100
Etc.						
1. Monthly Sales				1	\$14,875	
2. Monthly Cost of Goods Sold						2 \$12,000
<p>Opening Inventory: Estimate the number of times per month you could restock your store without paying a premium for delivery. Divide your monthly cost of goods sold (#2 above) by your estimate of number of times per month to restock. Your opening inventory should not exceed 1.5 times that amount. For example: if a store could be restocked twice a month, the monthly cost of merchandise sold was \$12,000: then \$12,000 divided by 2 equals \$6,000 times 1.5 equals \$9,000 equals opening inventory.</p>						

5. Estimate Merchandise Sales Prices

There are two ways to make profit--pricing and volume. Price merchandise to meet the competition (where villagers most frequently are now doing their daily shopping). In some cases you can be a bit higher and in some cases a bit lower (to draw customers into the store), but it will not be helpful in the beginning to underprice on everything. A good rule of thumb for markup on wholesale is 33%, which gives you 25% gross profit on sales. In other words:

75¢ = cost	\$1.00 retail price
<u>25¢</u> = 33% markup on cost	25¢ of retail price (25% of retail price)
\$1.00 = retail price	is gross profit on the sale

The merchandising thrust should be to sell more of the high volume, high price items (therefore high profit) that customers want. The store must test this margin to see if in total it will be enough to cover the planned operating expenses and provide a profit. The typical elements of operating expenses that must be covered are the following: (1) salaries and wages, (2) fringe benefits, (3) repairs/maintenance, (4) shrinkage, (5) bad debts, (6) returns and allowances, (7) communications, (8) administrative expense, (9) selling expenses (advertising), (10) taxes and licenses, (11) linen (aprons), (12) freight, (13) customs charges, (14) taxes on merchandise, (15) utilities, (16) fees (letter of credit fees), (17) insurance, (18) depreciation on building and equipment.

A retail store needs to be sure that it takes in more money than it spends. This calculation is made as follows:

- (1) Calculate how much the store pays for the merchandise it sells in a year (cost of merchandise or inventory sold)
- (2) Calculate how much is spent to keep the store open for a year (operating expenses)
- (3) Divide operating expenses by cost of merchandise sold to get break-even percentage. This percentage needs to be less than the mark-up percentage if the store is to make a profit.

For example: If the annual cost of merchandise sold equals USD 110,000 and the operating expenses for the year are USD 33,000 then USD 33,000 divided by USD 110,000 equals 30% as the store break-even for the year. At 30% break-even and if the store uses 33% as the mark-up then the store has made a 3% net profit.

Insight

--The price of each product sold is determined by a guideline percentage mark-up, the operating expenses, the volume sold (determined by the number of customers and thus the store location), government regulations on prices, and competing with prices in other stores.

--The operating expenses must be carefully watched to keep them at a minimum. Careful attention needs to be given to operating expenses like salaries, spoilage, costs of returning unsold merchandise, and extra freight expenses.

II. FEASIBILITY AND DESIGN: OPERATIONS

1. Select Store Site

On the basis of projected sales volume (from previous section) determine where the store should be located. The store location is one of the factors in the number of customers who will buy from the store. The necessary number of customers might come from the several blocks around the store, the entire community, or a larger geographic area than the community. Some values to consider are the closeness to the center of the community, other types of stores nearby, locating on the main intersection on the end of the community or near high-traffic services such as a bus stop or restaurant. In a small compact community the exact location of the store within the community may not be as critical a decision because customer convenience is obvious.

Having selected the best areas, the next step is to assess the available buildings, using these questions:

- 1) Is there sufficient space for storage, selling, office and display?
- 2) How big a job will it be to remodel? How long? How costly?
- 3) Is it wired? Plumbed? Is the condition of each adequate for the electricity and plumbing of a retail store?
- 4) Is the store near public transport? Can the customers easily get to the store?
- 5) Is adequate parking available for customers' vehicles?
- 6) Is the building structurally sound?
- 7) Is it accessible to other utilities?
- 8) Is the building convenient to potential customers?
- 9) Does the building have room for expansion?
- 10) Is the building available when needed?
- 11) How much is the rent?
- 12) How long is the lease (if there is one)?
- 13) What is the future planning for the area?
- 14) Is it exposed to congestion? Noise? Odors?

Insights

--A free facility may be a possibility in some communities.

--If it is possible to postpone rent payments for the first few months or until the store is profitable, there is added assurance that the store will get off to a good start.

--Procuring a site with minimum initial obligations of capital is often an advantage. This value needs to be held in tension with the value of not having to relocate the store in a short time.

SPACE	FEATURES	SITE	NEGOTIATIONS
Uses	Utility Access	Zoning/Legalities	Buy-Lease-Build-Inking
Sufficient/Appropriate Display Work Storage Office	Sewage Water Lighting Phone Garbage Mail	Check Zoning Previous Uses Folklore about property	Inventory of property and facilities Weigh advantages of buying/leasing
Layout	Equipment	Customer Convenience	Occupancy Speed
Convenience Efficiency Separation of public/private	Heating Refrigeration Loading Docks Built-in Equip/Furn.	Proximity to community nodes	Time frame
Future Useage	Security	Access	Cost Factors
Room for Expansion	Doors Windows Locks	Shipping transportation	Initial money Remodeling Maintenance
Remodeling	Aethetics	Nearby Useage	Future Flexibility
Plan Cost Time Effort Materials	Natural Lighting Wall Coverings Floor Material Sanitation	Noise Congestion Odors	Room for expansion Length of lease Change of usage

2. Research Equipment Needs

Brainstorm a list of necessary equipment. This probably includes at least display cases and shelving, coolers, freezers, cash register, marking stamps, cleaning equipment, peg board and hooks, packing tape, wrapping paper, string, bags and sign board.

Research suppliers, such as manufacturers, wholesalers, used equipment handlers, in-kind potentials, or build it yourself (figure in time, skill and expense of materials). Gather data in these arenas: how soon equipment would be available, lease/purchase options, basic/delux models, cash/credit terms, expense, estimated useful life (number of years), number of years and expense per year on lease/purchase options and estimated maintenance expense per year.

Insights

--In considering the need for freezer and cooler space, take into account the potential financial risk if the equipment should become inoperable when it is full of perishables.

3. Determine Utility Needs

Use the records of the building that is selected to determine the annual cost of heat, electricity and water. If records are not available, estimate after asking other local sources and the utility company. If freezers and coolers are called for, determine if the wiring has sufficient capacity to run them.

4. Investigate Licensing and Regulations

Check with a Guardian attorney and a friendly retailer as to the licenses, regulations and tax laws affecting the store. List the necessary licenses and their cost. Determine which licenses, regulations and tax laws are being enforced and make sure the store will meet these regulations. Get a copy of tax schedules and factor them into the expense calculations.

Insights

--Before committing funds or signing a lease, establish that there are not costly changes that are required to the building to comply with licenses or regulations. The fewer legal regulations and licensing the store gets involved with the better. Do only what is necessary.

5. Determine Insurance Needs

There are two types of insurance to consider. The question of risk exposure versus expense needs to be raised in connection with each type. The first is employee insurance. This is determined by government regulations, local custom, union contracts and customary practices within the industry. In the USA, typical forms of employee insurance are FICA, unemployment compensation, workmen's compensation, retirement plans, pensions, dental, medical, life, and long-term disability.

The second is general business insurance. This insurance is purchased by a business to minimize the risk of financial loss due to the unforeseen. Typical types are fire, casualty, hail, robbery/theft, blanket bond (employee dishonesty), flood, glass breakage, business interruption, liability (auto, general, umbrella) and flight.

Insights

--Lean toward insuring against extraordinary losses rather than against every possible loss. Ask what is the risk of this happening. Checking with similar retail stores to see what they insure for is helpful.

--One project found it necessary to insure merchandise in transit to the store. This may be the case when project is a long distance from regular transportation.

FEASIBILITY AND DESIGN: FINANCE

1. Define organization Forms, and Registration Requirements

Review the Local Economic Vehicle document of GRA: Chicago 1977 for the overall organization pattern. Determine the store organization, in terms of management, bookkeeping, clerks and stocking shelves. Several employees will most likely have to perform more than one function when the store is beginning. For example, the manager may also be a clerk and a part-time bookkeeper. This can be used as an opportunity for all employees to learn the overall operation.

Review registration requirements with a local attorney. Often a separate corporation should be set up. Things to be considered in doing this include loan compliance requirements, federal government requirements, state authorities, price controls, taxes, and licenses.

Insights

--The organizational forms and registration requirements can be determining factors in having a profit-making operation.

--The organizational forms for employees can decrease the amount of salaries paid when all employees are doing more than one task and thus decreasing the number of man-hours employees are waiting for customers to arrive.

2. Estimate Equipment and Facility Costs and Determine Depreciation

Calculate facility costs by estimating costs of building construction or renovation (this is not considered an expense, but rather set up as an asset in the bookkeeping system), or by estimating building rent. Calculate utilities costs per month for water, power, and waste removal systems. An expert in each arena may be consulted for more accurate estimates. Calculate the cost of acquiring needed equipment. Estimate the life of each piece of equipment, and for the building (if owned). Use conservative figures, such as the building 20-30 years and equipment for 10 years or less. Remember in estimating the life of equipment, a used piece will have a shorter life than when it was new. Calculate the depreciation by dividing the cost of the item by its life in months. This gives the monthly depreciation rate which is only an estimate, but usually sufficient for the monthly balance sheet. For example, the cost of a freezer is USD 2,400. Its useful life is estimated at 10 years. USD 2,400 divided by 120 months equals USD 20 monthly depreciation.

3. Prepare Pro Forma Financial Statements

List the cost of merchandise using the formula from the merchandising section of this document p.12. Determine the monthly wage and salary requirements by determining how many employees will be required to staff the store during the hours the store will be open each month. Estimate the hourly rates for all personnel, multiply the hours per month times the rates and enter the salaries expense in the Projection Worksheet. Estimate the

operating expenses in addition to salaries discussed in the Merchandising Feasibility section including (1) fringe benefits, (2) repairs/maintenance, (3) shrinkage (for example, the drying out of produce which causes a decrease in weight), (4) bad debts, (5) returns and allowances, (6) communications, (7) administrative expense, (8) selling expenses (advertising), (9) taxes and licenses, (10) linen (aprons), (11) freight, (12) customs charges, (13) taxes on merchandise, (14) utilities, (15) fees (letter of credit fees), (16) insurance, (17) depreciation on building and equipment (18) other expenses. Enter these expenses in the projection worksheet (see following example).

Global Operations Centrum: Chicago	PRO FORMA FINANCIAL STATEMENT (Projection Worksheet) First Twelve Months Projected Profit											Retail Manual December 1977
	Month											
	1	2	3	4	5	6	7	8	9	10	11	12
INCOME:												
Merchandise Cost + 33% Mark-up = Sales	2000	2800	4000	6000	8000	10000	1200	1600	1600	20000	20000	20000
EXPENSES:												
1. Cost of Merchandise	1500	2100	3000	4500	6000	7500	9000	1200	1200	1500	1500	1500
2. Operating Expenses												
Salaries												
Benefits												
Repairs												
Shrinkage												
Bad Debts												
Returns												
Communication												
Administration												
Advertising												
Taxes												
Linen												
Freight												
Customs												
Utilities												
Fees												
Insurance												
Depreciation												
SUBTOTAL:	800	900	1100	1500	1800	2200	2500	3000	3000	3500	3500	3500
Projected Net Profit*	(300)	(200)	(100)	0	200	300	500	1000	1000	1500	1500	1500
* () = Negative Value Break-even = 4th Month Net profit for the year happens in 7th month.												

Insights

--The projection worksheet is a financial image of what is going to happen, not merely an exercise in preparation to get a loan. Include all potential expenses in this worksheet. Be careful not to underestimate the expenses. A projected loss in the first few months is not unusual. The gross profit is the profit before considering the operating expenses of running the store and provides a basis for pricing merchandise.

4. Discern Break-even Point

The break-even point in the example projection worksheet occurs in month 4 when the gross sales equals the cost of merchandise plus the operating expenses. However a net profit for the year happens in month 7.

Insights

--If the break-even point is near the maximum volume of merchandise the store can physically sell, either the store should not be set up, operating expenses should be reduced or the store should be larger (have more customers and/or have more space for larger volume sales). Do the feasibility study again with these considerations in mind.

--If the break-even point is near a very low sales volume, review the expenses, checking to see if all estimates are included at a large enough amount.

5. Determine Cash Requirements

Review the cash projection plan in the set-up and initiation section (P.33-34). The income projection worksheet data is used in the cash projection. Initial inventories and receivables (if credit will be extended to customers) will need to be projected.

6. Determine Capital and Loan Requirements

The store needs capital to buy the permanent or fixed assets, such as the building and equipment. The store needs capital to pay start-up expenses, such as incorporation costs, wages to set up equipment or raw materials for building renovation. The store needs capital to cover the losses in the first months of operation. In the sample projection worksheet, there are three months of losses before break-even. The store needs capital to finance the initial merchandise inventory. The store needs capital to finance receivables if the store extends credit to customers. The store needs capital for other contingencies, such as the initial cleaning supplies.

The Capital Needs Worksheet at the end of this section is an important tool for determining the best estimates of how much capital the store will need to begin operating. Once this amount is determined, then the types of financing need to be discerned. First explore ways to procure this capital through contributions and in-kind. Finally, loans need to be selected and the financial sources for these loans need to be chosen.

Insights

--Realistic capital estimates need to be made.

--An over-estimate on capital often leads to unnecessary interest expenses, un-planned spending, and increased difficulty in procuring the capital (usually requires more sources and raises questions of creditability with sources).

--An under-estimate on capital often leads to the need to go back to operating with insufficient inventory, employees, equipment and/or facilities, and increases the difficulty in procuring the capital (source does not think the store can make a profit on such a low capital investment and is a poor credit risk).

Global Operations Centrum: Chicago		CHART OF LOAN TYPES		Retail Manual December 1977
Category	Type of Loan	Purpose of Loan	Necessary Collateral	Sound Debt Servicing Practices
Short Term Loan (one year or less) Often most difficult to obtain due to risk	Operating or Working Capital Loan	Financing inventory, materials, labor	Inventory purchased	Bank will expect the loan to be repaid when the inventory is sold (even if you intend to borrow again in two weeks for the next inventory.)
Intermediate Term Loan (one-ten years)	Building Renovation	Needed to sell inventory Example: Cash Register	The equipment or machinery itself. (This loan usually requires down payment at least equal to expected depreciation during first year.)	Make plans to retire some of the debt each year. This is very important in order to establish a good loan history to enable future borrowing.
	Equipment			
Long Term Loan (ten years or more)	Capital Improvement Loan	Purchase of building site	Mortgage on land or building	Payment is usually scheduled over the life of the loan, 30-40 years. Payments need to be made on time; if payments are too large, renegotiate mortgage for lower payments over longer terms.

Category	Type/Form	Purpose/Use	Collateral
Grants	Government grants Foundations Individuals Industry	Capital improvement or operating funds per stipulation	None (obligation to use for purpose intended)
Special Development Funds	-Rural development funds usually guaranteed loans by host government - Co-ops: national system for transfer of funds urban to rural	Wide range of community development projects	Often municipal obligations--long term
Sale of Bonds	First Mortgage Sinking Funds Debentures	Long term capital improvements--refinancing short-term debt	Assets of corporations Good will of corporations
Sale of Stock	Preferred Stock Common Stock	Furnish initial or expansion capital for enterprise	Stock represents ownership--upon liquidation owners have last claim on assets
Leasing Of Equipment	Contract with equipment manufacturer or dealer	Means of getting store open without an investment in total value of equipment	Lien on leased equipment by lessor
Vendor Financing	Formal Contract	Supplier of materials provides equipment that uses his materials	Lien on equipment furnished
Venture Capital	Loans Letters of Credit	Usually intermediate term financing of operations	Sometimes social conscience of lender
Local Credit Union	Note payable instruments	Intermediate and short term operations	Assets of enterprise
Other Sources: World Bank Ex/Imp Bank OPICS			

Estimated Monthly Expenses		Start-up Cash Needed (1.5 times column 1)	Comments
Item	Column 1 Amount		
Advertising			Averaged from estimated income and expenses for first twelve months.
Communications			
Freight Expense			
Insurance			
Interest			
Legal & other professional fees			
Maintenance			
Utilities			
Rent			
Salaries and wages			
Supplies			
Taxes			
Miscellaneous			
Starting costs--to be paid once (Do <u>not</u> multiply by 1.5)			
Fixtures & equipment, cost/installation			Averaged from estimated income and expenses for first twelve months.
Decorating & Remodeling			
Opening inventory			
Deposits with public utilities			
Legal & other professional fees			
Licenses & permits			
Advertising & promotion for opening			
Accounts receivable (this may be zero)			
Cash			
Other			
TOTAL ESTIMATED START-UP CAPITAL NEEDS			

IV. FEASIBILITY AND DESIGN: PERSONNEL

1. Ascertain the Number of Workers Needed

One rule of thumb is a full-time sales person for each USD 80,000 of annual sales. Thus, if the store's annual sales are projected to be USD 180,000 two full-time and one part-time sales persons should be considered. It would be wiser to hire only two employees to begin, one of whom would be the manager. Allow the increasing sales to create the need to hire additional people.

Other values to consider when determining the number of employees needed are:

- 1) What is the number of employees necessary to assure that customers are served immediately in all except peak business periods?
- 2) What is the number of employees necessary to minimize shoplifting?
- 3) What are the number of employee hours needed to handle receiving and marking merchandise?
- 4) What are the number of employee hours needed to do the cleaning and maintenance functions?

In a small store, each employee and the manager will need to do all the jobs from selling to cleaning.

In order to spread the available jobs throughout the unemployed families in the community, it may be helpful to hire several part-time employees rather than only a few full-time. It may also be helpful to hire part-time employees when the store hours are long.

2. Select a Manager

Where possible it is important that candidates for manager be able to read, write and do mathematics. When this is not possible, an auxiliary is required in the store until the manager is trained in basic literacy and basic bookkeeping.

Insights

--It may be helpful to have the managers of all the economic programs (commerce, industry, agriculture) paid the same salary. This enables maximum flexibility in the use of managerial skills, particularly when new economic enterprises are started. A trained manager can move on to begin another new business without any financial sacrifice. This also dramatizes the fact that business skill is for public rather than private benefit.

--If a local manager has not been found, it may be helpful to go ahead and announce the date of the opening of the store. In several projects, this announcement has catalyzed the decision of a local resident to be the manager.

3. Determine Available Workers' Skills

Literacy and mathematics knowledge is important for anyone who is being considered for a sales position, because of the need to write sales slips, ring up sales and receive and mark merchandise. Screening potential employees may be done by giving a simple test in reading, writing and mathematics by observing how they work with other people.

4. Determine Hours of Operation

In determining the hours the store will be open, it is necessary to analyze who buys and when they buy. Factors to consider are (1) when residents get off from other jobs, (2) traditional shopping hours, and (3) existing market days. Shifts may need to be staggered to provide overlap during peak periods, such as meal times. Part-time employees may be required during busy times such as a pay day.

5. Check training Resources

Check the availability of training resources for employees within the community and surrounding area. Nearby schools may offer literacy and mathematics training. Tours of other stores and wholesalers in a regional market city as laid out in the merchandising section can be used as training events. A key training resource can be the staff collegium meetings each morning, at which time current contradictions are moved on, any special assignments can be made for the day and short training sessions can be held.

6. Determine Salary Patterns

In the beginning, employees often start on an hourly or daily wage. This allows the employee to see that he is paid for the number of hours he works. As the store begins to make a profit and the employees see themselves as part of the store team, a weekly or monthly wage for specific tasks may be more helpful. One way to establish wage rates is to establish a daily wage and pay part-time employees a percentage of it.

Insights

--In a situation where the potential employees have an income from government subsidy, it is possible not to pay salaries during the start-up months. This will enable a decrease in the initial operating expenses.

V. SET UP AND INITIATION: MERCHANDISING

1. Select Suppliers and Transportation

Use price, quality and delivery service as major criteria for selecting suppliers. Find suppliers that will deliver, sell in split cases (less than a whole case) and allow the return of goods if they are not sold. Buy from wholesalers and not other retailers, in order to get lowest prices. If the supplier does not find it economically possible to deliver, try to combine shipments with those of another retailer. (It may be that the orders for the store are too small to qualify for free delivery.) Balance the frequent deliveries. Lean toward frequent deliveries without extra cost, thus cutting down on the amount of storage space needed.

2. Establish Merchandise Prices

Review the pricing discussion (p.11-13) for reminders of factors involved in pricing. Review the gross profit margins projected in the monthly projection worksheets (p. 19). It will be necessary to increase margins on some products to make up for mark-downs on slow-moving merchandise. Calculating selling prices right on the invoices, then using these same invoices when marking products is a helpful method for keeping necessary information available.

In some countries the government controls the retail prices on basic products that are sold. This means the retail store has a fixed percentage of mark-up which is often less than what is necessary for the store to make a net profit. In this situation the retail store must stock, merchandise and sell a volume of non-price-controlled items at a greater percentage of mark-up to off-set the price-controlled items so the store will make a net profit. When the store is planning to add to the variety of products sold, correct proportions of price controlled and non-price-controlled products must be introduced to maintain and increase the net profit.

Insights

- Some projects have found it helpful to price essentials low and luxuries high.
- Keep the prices up at first. It is easier to lower prices and to raise them.
- For advertisement that draws customers in, it may be wise to mark down a few key items.

3. Determine Inventory Control Procedures

The general rule is to order enough of each product to last until the next time the store will be receiving a delivery of that product or to order a minimum quantity if it is a slower selling item.

There are three ways to make up an order--sight check, weekly review and monthly review. A store will probably use all three ways at different times

Procedures for taking inventory and preparing an order include:

- 1) Physically count the products and enter the number in the on-hand column.
- 2) List the quantities to be purchased based on usage.
- 3) It is possible to calculate sales by:
$$\text{beginning on-hand} + \text{purchases} - \text{ending on-hand} = \text{sales}.$$
- 4) At the end of the month, the on-hand inventory should be priced at what it cost the store to buy it (on-hand quantity multiplied by cost price) and entered in the value column.

Insights

More formal stock checking on products by the clerk may be useful as a training tool to help develop merchandising skills quickly as clerks begin to decide what moves good or poorly, what should be marked down and what additional items to stock.

4. Allocate Shelf Space

The most visible shelves are at eye level. Therefore, stock them with those products which sell at a rapid rate (high volume) and high price. For example, something that sells for USD 1.00 has a gross profit of 25¢ (a 33% mark-up) and should go on the eye level shelves to encourage its purchase. Something that sells for 12¢ (USD) with a gross profit of only 3¢ (USD) (a 33% mark-up) and which is purchased often (such as milk, pop, bread) doesn't need to be displayed so obviously. Put any other products that customers are being encouraged to buy on the eye level shelves or out in the open where the customers will be bound to see them. The remaining products may be located within the store by types of products such as canned goods, dairy, paper, staples, vegetables, pop and other.

Insights

--If a product doesn't sell, it may be because it is priced too high, in the wrong location in the store, or is seasonal. Consideration needs to be given to lowering the price, putting products on sale, changing shelf location or removing products from the shelves. (It is generally not profitable to tie up shelf space with products which do not sell with regularity.)

5. Customer Returns

Reasonable requests to return unsatisfactory merchandise should be honored. There are several alternative methods for doing this:

- 1) Replacement of what the customer purchased is the primary means.
- 2) Credit may be given if the customer has an unpaid balance in his account.
- 3) If the customer's account is paid in full, he can be given credit for future purchases.
- 4) Cash may be given if the customer paid cash and insists on receiving cash in return

during the month. (Sight check items are those you can remember what is needed, without actually looking on the shelves, such as bread, milk, pop. They are usually ordered more than once a week. This may include many items in a small store.)

The format and use of the stock checking sheet is shown below. Keep the sheets of products for sight checking together; those for weekly review together and those for monthly review together. Within each of these three sections, pre-print the products, cost and selling prices on pages according to how they are located and reviewed in the store (i.e. canned goods, dairy, bakery). Leave blank space for additions on the bottom of each page.

Global Operations		STOCK CHECK AND INVENTORY											Retail Manual		
Centrum: Chicago													December 1977		
(Example of review of one item using the same form for a month)															
Item	Cost Price	Sell Price	Quantities												Value
			On Hand	Pur.	On Hand	Sold	Pur.	On Hand	Sold	Pur.	On Hand	Sold	Pur.	On Hand	
<u>FIRST MONDAY REVIEW</u>															
Beans 10 oz.	.60	.80	20	24											
<u>SECOND MONDAY REVIEW</u>															
Beans 10 oz.	.60	.80	20	24	10	34	48	--SOLD 34,	SO	ORDER 2 CASES					
<u>THIRD MONDAY REVIEW</u>															
Beans 10 oz.	.60	.80	20	24	10	34	48	16	42	48	--SOLD 42, SO				ORDER 2Cs.
<u>FOURTH MONDAY REVIEW</u>															
Beans 10 oz.	.60	.80	20	24	10	34	48	16	42	48	40	24	24	--SOLD 24, SO	ORDER 1CASE
<u>END OF MONTH</u>															
Beans 10 oz.	.60	.80	20	24	10	34	48	16	42	48	40	24	24	20	\$12.00
PRICE END OF MONTH INVENTORY @ COST															

A credit slip will be prepared in duplicate. One copy is given to the customer and the store keeps a copy. This gives credit to the customer for the value of the merchandise returned and is posted to his account. Ask for the sales slip to ensure that this merchandise was bought recently at the store. The price of the returned merchandise needs to be rung through the cash register as a charge sale. If material is without value, dispose of it (or authorize the customer to do so after you have seen it.) If the merchandise has some value, it may be marked down and sold.

6. Begin Advertising

Posters, newspapers, the Voice, door-to-door leaflets and signs outside the store are helpful in advertising. Some helpful advertising gimmicks are:

- 1) Feature sales on key merchandise
- 2) Advertise merchandise for \$1.99 rather than \$2.00
- 3) Price of merchandise cut by 1/3, 1/4, etc.
- 4) Emphasize good quality of a product
- 5) Emphasize quality or price rather than store's name in advertising.

7. Set Grand Opening

Suppliers can be asked to provide free merchandise to sell at discount and for give-aways (door prizes) in exchange for the store using their products in the future.

VI. SET UP AND INITIATION: OPERATIONS

1. Obtain Location

Draw up a lease proposal asking for more than you want and offering less than you are prepared to give. This will give you room for negotiation. The following is a sample lease:

The _____ HDP Community Corporation (lessee) agrees to lease the building located at _____ from (name of landlord, lessor) for a period of six months at a monthly rent of \$50. Lessee has an option to renew this lease for 12 additional months at the same rental fee. Lessor is responsible for maintaining the entire exterior and the internal support structure of the building, including the wiring and plumbing. Lessee is responsible for all other maintenance. Lessor is responsible for all back taxes and liens on the property. Lessor agrees not to engage in similiar retail business within 10 miles of this location during the term of this lease. This lease is binding on the lessor's heirs and executors.

Signed,

_____ Lessor

_____ Lessee

Before purchasing any property, a check with Global Management Centrum will assist in dealing with legal complexities.

2. Obtain Equipment

The first alternative is to in-kind all needed equipment. Many suppliers will give display equipment if the store stocks their products. The second alternative is to rent a minimum amount of equipment. The third alternative is to buy equipment. Reputable companies normally give a six-month to two-year guarantee. The fourth alternative is to have some equipment, like shelving, built locally by volunteers. In deciding between these alternatives, one major factor to consider is that it is more helpful to pay rent on equipment for a period of time than to buy it if the building lease is only for 6 to 12 months, unless there is an iron-clad buy-back contract with the equipment supplier.

3. Design Space Usage

Our main concern in store set up to date has been to get the maximum amount of merchandise into the minimum amount of space with smooth customer traffic flow and high visibility with no blind corners which encourage shoplifting. For example, the Vogar atore, only 26' by 30' is typical in its floor plan, for a small store where allowing customers to walk among the shelves self-service style was desired.

Open space should be planned near the door and wrap counter to allow space for waiting. Merchandise, other than staple products which are needed constantly, should be displayed near this area to encourage their purchase. Three-foot wide

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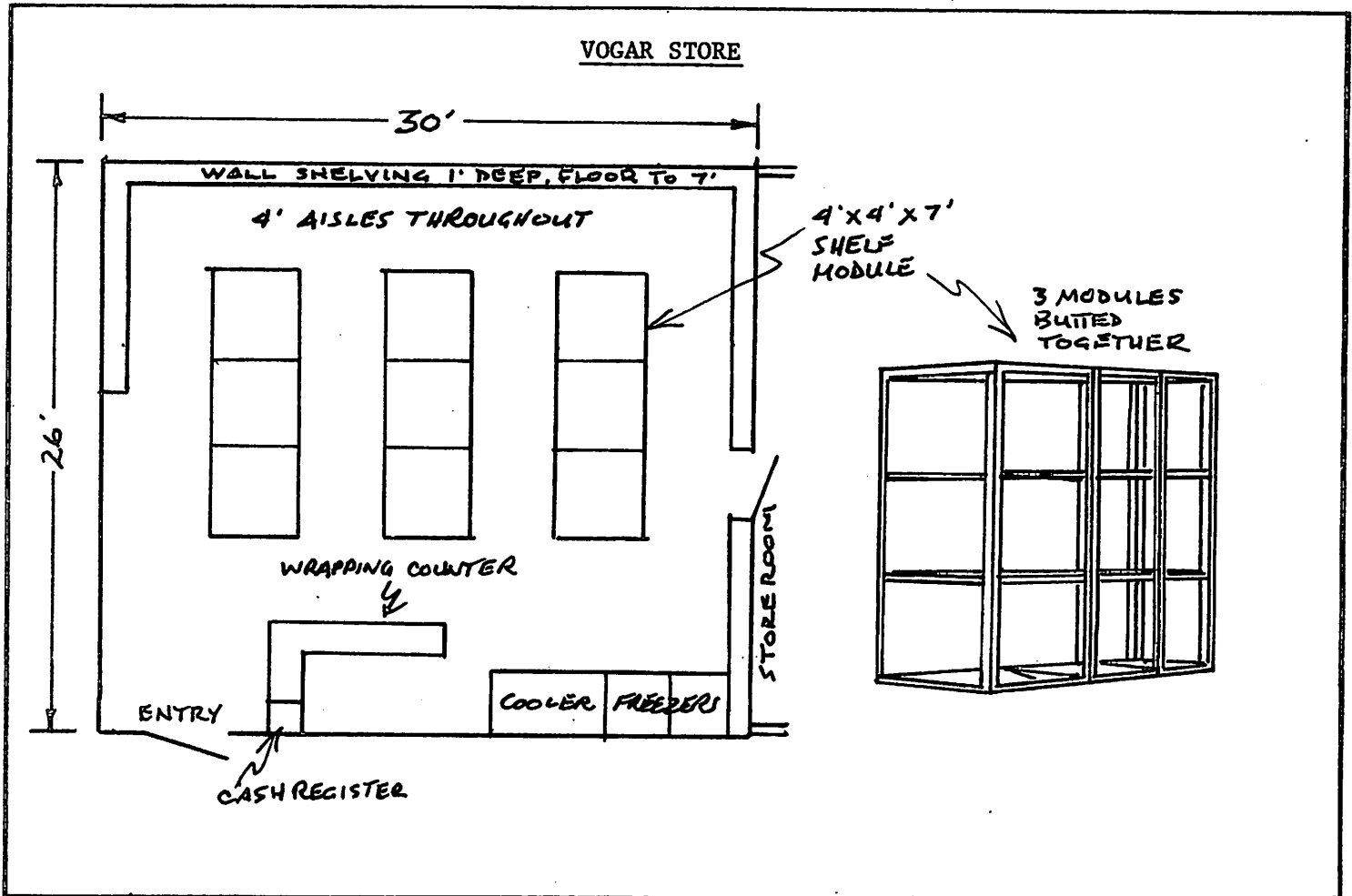
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aisles are usually minimum. Allow for adequate storage space. The prime factor in determining the amount of adequate storage space is the frequency of delivery. For example, the Kwangyung II store receives new stock every few days; therefore, it needs no storage space. Everything is on display. On the other hand, the Vogar store receives major shipments twice monthly and has 6' by 26' storage space.



4. Establish Receiving and Marking Procedures

All goods should be checked in carefully when they are received from the vendor to be sure the store has received what was ordered. When merchandise arrives, check quantities and descriptions against the packing slip. Save the packing slip and check it against the invoice. If there are any errors, contact the supplier at once.

If prices have gone up since the last order, raise the prices of the old merchandise on the shelves as well as the new shipment. Rotate the old merchandise to the front of the shelves and put the new in the back. Mark the retail price on each product where feasible. If the product is something which is difficult or inconvenient to mark, such as soft drinks, posting the prices on a display card nearby is adequate.

5. Establish Security System

When a daily bank deposit is not possible, a secure place is needed for overnight money storage. If there is a safe elsewhere in the community, it may be used.

One method of installation of a safe is to cement the safe into the floor, if possible, and recess it into a wall or against a wall so there is no way to insert a pry bar behind the door of the safe.

6. Schedule Maintenance and Cleaning

In order to bring intentionality and motivity in the store, sweep the store every night, dust every morning, polish glass regularly. Keep the merchandise on the front of the shelves at all times. Keep the shelves stocked as much as possible, spreading out the inventory so that shelves look filled when in fact they may not be. Placing products so that all labels face the same direction adds to the orderliness of the store.

VII. SET UP AND INITIATION: FINANCE

1. Update Income and Cost Projection

Refer to pages 18-20 if time has elapsed since you made the income projection. Prepare an initial cash flow projection using attached worksheet. It is assumed that the sales are all cash sales and expenses are all paid in the month they are incurred. The debt payments (notes payable) need to be deducted from the monthly results of the income and expense projection (pages 20 & 23) in order to arrive at the net cash excess or deficiency. The merchandise inventory will tend to grow each month as the business grows. The cash flow to pay for the amount of inventory change (increase or decrease) in a month must be estimated. This expansion of inventories can usually be estimated built on a percent of sales before mark-up. Minimize physical inventories (counting product by product) in the first six months because it takes time. However, a physical inventory is a training tool for employees and also a physical inventory will quickly reveal pilferage. The capital requirements (usually procured through a loan) are required early enough to pay for the new assets (such as equipment) and the cash deficiency in the early months. If inventory and new assets are procured on credit, payment can be deferred as long as possible. The cash flow should be prepared as outlined in the following sample.

Global Operations Centrum: Chicago .		CASH FLOW REPORT (sample)		Retail Manual December 1977		
CASH FLOW DESIGN						
		January		February		March
		Projected	Actual	Projected	Actual	Projected
b. CASH INCOME	BALANCE BROUGHT FORWARD	a. 1,500		e. 350		
	COLLECTIONS	ACCOUNTS RECEIV.	500		700	
		NOTES RECEIVABLE				
		MISCELLANEOUS				
	SALES FOR CASH	2,800		2,900		
	OTHER CASH INCOME	50				
	TOTAL	4,850		3,950		
c. CASH DISBURSED	PAYABLES	ACCOUNTS PAYABLE (Bills due)	1,100		600	
		NOTES PAYABLE	1,000		1,000	
		MISCELLANEOUS				
	PURCHASES FOR CASH					
	OPERATING EXPENSES	2,400		2,400		
TOTAL	4,500		4,000			
d. CASH EXCESS (DEFICIENCY)		350		(50)		

The following procedures are helpful for filling in the cash flow chart:

- (1) Enter the bank balance on the first line of the first period column.
- (2) Enter all projected cash income by source in each period column.
- (3) Enter all projected cash disbursements.
- (4) Add the beginning balance to the cash income total and subtract the cash disbursements total to arrive at the period cash excess (or deficiency).
- (5) Transfer the period excess or deficiency to the beginning balance line of the next period column.

Continue period-by-period to arrive at the cash excess or deficiency for each period.

Insights

--Remake the income and expense projections if time elapses between the feasibility study and initiation because as new knowledge comes to light, financial projections will change.

--When the bank account is overdrawn, it is too late to do a cash flow projection on the immediate situation.

2. Acquire Financing

Research the various money sources including the local residents, government grants, private sector grants, individual donations, investor within the community, and banks, both development and commercial (commercial banks generally require collateral, have higher interest rates, and have shorter term loans than development banks). See permanent or temporary donation of collateral, such as the use of a savings account. Contracts in hand, land, and equipment are examples of usable collateral. Check loan terms and repayment schedules over against income to see that repayment is possible. Review the charts (pages 21 & 22) relative to loan types and funding sources.

Insights

--Things accomplished and moving are helpful for potential financiers to make loans.

--Starting small and then adding equipment and inventory, makes getting loans easier.

3. Establish Bookkeeping System

Decide whether you use a cash receipt and cash disbursement book only (usually adequate for a small store). Samples of such are attached on the next two pages. A larger company might use a general ledger, with subsidiary ledgers for receipts and disbursements, and separate pages for individual accounts. Establish a chart of accounts (a coding structure) for all of the balance sheet and income and expense accounts. Cash receipts book and cash disbursements book have cash-in and cash-out columns with specific designations of the source of the revenue and type of expense.

CASH RECEIPTS - FROM SALES OR SERVICE

PAYMENTS - ALL CASH AND CHECKS PAID OUT

IDEAL SYSTEM, REG. U.S. PAT. OFFICE, MADE IN U.S.A.

IDEAL SYSTEM - FORM 611

1-B		1-C	2				3	4	4-A	5	6	
CASH RECEIVED FROM:			TOTAL CASH RECEIVED	DATE 19__	CHECK NUMBER	NAME	PAID OUT BY CASH	PAID OUT BY CHECK	DEDUCTIONS FROM EMPLOYEE'S EARNINGS	MOOSE OR MATERIAL		
1												1
2												2
3												3
4												4
5												5
6												6
7												7
8												8
9												9
10												10
11												11
12												12
13												13
14												14
15												15
16												16
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25												25
26												26
27												27
28												28
29												29
30												30
31												31
32												32
33												33
						TOTALS						

REG. U.S. PAT. OFFICE



DISTRIBUTION OF EXPENSES

THE IDEAL SYSTEM, REG. U. S. PAT. OFFICE, MADE IN U. S. A.

IDEAL SYSTEM - F

1	7	8	9	10	11	12	13	14	15	16	17	18	19		20
	PAYROLL EMPLOYEE'S TOTAL EARNINGS	INTEREST	TAXES AND LICENSES	RENT	REPAIRS TO EQUIPMENT ETC.	LIGHT. POWER, HEAT, WATER	TELEPHONE AND TELEGRAPH	OPERATING SUPPLIES	ADVERTISING	INSURANCE	OTHER EXPENSES	OTHER PAYMENTS		1	
												NAME OF ACCOUNT	AMOUNT PAID		
2															2
3															3
4															4
5															5
6															6
7															7
8															8
9															9
10															10
11															11
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27															27
28															28
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31															31
32															32
33															33


 REG. U. S. PAT. OFFICE

Insight

--Get some bookkeeping help to set up the books. A regional accounting firm can be helpful. Arthur Anderson is the Institute image of establishment bookkeeping. It is not necessary to go to the top firm in the nation, but do get a reputable firm. Guardians can be of much assistance here.

--Write down good explanations for each entry. It is difficult to remember later what each entry is for.

4. Open a Bank Account

Open both a separate checking and a savings account for the store. The savings account is used to gain interest on capital that for several days or months will not be needed. A separate checking account allows the bank to do the bookkeeping of keeping the business of the store separate from other project activities. Have the management committee or board decide who the dual check signers will be.

Insight

Opening a separate bank account for the business is symbolic that the business is separate and independent. This bank account is the first step to establishing that the money requirements of the business are the responsibility of the management of the business and no other entity.

5. Initiate Cash Receipts Processing System

Require all cash receipts to be entered in the cash register journal as they are received. If you have a four button cash register, you can segregate sales into grocery, meat, produce and non-grocery items to have a better analysis of sales and profits. Reconcile the cash register tape total to the cash to be deposited for the day on a cash-out sheet, as seen below. There are also additional examples of cash reconciliation sheets and a cash receipts-disbursements flow chart at the end of this section.

DAILY CASH OUT SHEET		Date _____
Cash Register Tape Total	_____	A
Less:		
Overrings	_____ J	
Deposits on Bottles	_____ K	
Credit Sales	_____ L	
Cash Payment to Vendors	_____ M	
	_____	B
Total: (A - B)	_____	C
Plus: Payments on Customer Accounts	_____	D
Subtotal: Cash in Drawer (C + D)	_____	E
Change Fund	_____	F
Subtotal: (E - F)	_____	G
Cash over (or short) (G - C)	_____	H
Deposit into Bank (G)	_____	I

In filling out the daily cash out sheet, the cash register total is the total amount on the tape for the day. Overrings are errors in ringing up an item. The cashier should write next to the amount on the tape when there is an overring. Put the customer tape in the cash drawer, and enter the correct amount in the register. Tickets should be given for bottles returned. They can be used to purchase groceries. They are accounted for as cash as a part of the cash out process of the cash register. Some sample forms call these "coupons". Credit sales should be accounted for from sales slips in the register. A different cash payment slip should be prepared and put into the register, (i.e. when the bread man is paid) or when cash is removed from the register between cash register clearings (daily total). A sample slip from Fifth City is seen below:

FIFTH CITY SUPER FOODS	
Date	_____
Time	_____
Register No.	_____
WITHDRAWAL AMOUNT	
Cash	_____
Food Stamps	_____
Cashier Initials	_____
Office Initials	_____

It is helpful to make this slip the size of the paper currency of the nation.

Payments on customer accounts require another type of slip, (i.e. a duplicate of the receipt) in the register and these are added up and entered on the cash out sheet. Discuss the ways to avoid cash over and short with the cashiers. This should minimize the possibility that it will occur often. Prepare the bank deposit slip. Report the cash receipts in the cash receipts portion of the combination receipts-disbursements book each day. If register totals are available as a breakdown, such as grocery, meat, produce, non-grocery, these can be posted separately in order to analyze profitability by category.

Insights

--The key to accurate cash receipt processing is to reconcile cash daily and prepare deposit of cash receipts for the bank daily. If going to the bank every day is not possible, hold the cash in daily bags and make 4, 5, or 6 separate deposits when the trip to the bank is made. Let the bank do the bookkeeping.

--If it is necessary to remove cash out of the cash register, try to replace it with a check from the checking account before the daily deposit is prepared or take it out in even amounts and record it accurately in the cash disbursement journal.

CANNON BALL COMMUNITY
SHOPPING CENTER

DAILY
CASH
WORKSHEET
(Sample)

Date _____
Day _____

	Cash Register Readings	Cash Accounting	
S T O R E	Ending _____	Ending Cash in Drawer	_____ A
	Start(-) _____	Starting Cash in Drawer	_____ B
	Over Rings(+) _____	Total Cash (A - B)	_____ C
	Total _____	Refunds	_____ D
		Cash Payments	_____ E
		Credit Sales	_____ F
		TOTAL SALES (C+D+E+F)	_____ G
L A U N D R O M A T	X	Washer #1	_____ H
		Washer #2	_____ I
		Dryer #1	_____ J
		Dryer #2	_____ K
		TOTAL SALES (H+I+J+K)	_____ L
C A F E	Ending _____	Ending Cash in Drawer	_____ M
	Start(-) _____	Starting Cash in Drawer	_____ N
	Over-rings(+) _____	Total Cash (M-N)	_____ O
	Total _____	Refunds	_____ P
		Cash Payments	_____ Q
		TOTAL SALES (O+P+Q)	_____ R
T O T A L	X	GROSS RECEIPTS (G+L+R)	_____ S
		NET FOR DEPOSIT (C+L+O)	_____ T

CASH RECEIPTS/DISBURSEMENT FLOW

Register
Tape
Clearing

A _____

CASH SHEET

Cash Register Total _____ A

Less:

Overrings _____ J

Deposits on bottles _____ K

Credit Sales _____ L

Cash payment to vendors _____ M _____ B

Total (A - B) _____ C

Payment on Customer Accounts _____ D

Subtotal: Cash in Drawer _____ E

Change Fund _____ F

Subtotal: (E - F) _____ G

Cash over (or short) (G - C) _____ H

Deposit into Bank (G) _____ I

Deposit Slip Date _____

Cash _____

Checks _____

Total _____ I

Check Book

Date/#/Item	Amount/Deposit/Balance
	I

Date	Description	Cash In			Accounts Receivable	Cash Deposit	Cash Out	Check #	Items	Expenses				
		Cash Received	Cash on Credits	Over or Short						Salary	Inventories	Supplies	Etc.	Etc.
		C	D	H	L	I	M							
							This column is spread across expenses		This column is spread across expenses					

6. Initiate Cash Disbursements Processing System

Pay as much as possible by check. A board member should be a check signer and review the disbursements. It may be possible to use a rubber stamp or signature plate and have a board member review invoices, check copies and initial a sheet that designates the check number range of the checks signed. Maintain a running balance of checks and deposits in the check book. Post the checks in sequence in the cash disbursements book. It will make it much easier to reconcile it to the check book and the bank account at month's end. Enter voided checks in sequence at the time they are voided, so all check numbers are accounted for. Voided checks have signatures cut off and filed with other cancelled checks.

Insights

Paying by check allows for an accurate record of expenses. Recording checks in the cash receipt-cash disbursement journal daily makes it much easier to tell later what has happened.

7. Set Up Payroll Records

Investigate any deductions and tax laws where the store is located. Set up a payroll record for every employee. In a very small company, it may be sufficient to use the checkbook as a payroll record by recording the following minimum information on each paycheck stub: employee's name; government identification number if required; gross pay, including note as to how it was computed such as hourly rate multiplied by hours worked; and deductions, itemized by type and amount equals net pay.

A second system is payment by cash rather than check. In this case a worksheet may be used to itemize gross-to-net pay for each employee, and one check can be written for the total pay of all employees. This check can be cashed at the bank to provide the cash payout. The cash to be paid to each employee should be balanced out with the total cash payments shown on the earning worksheet, and each employee should sign for the cash received. The third system is more formal payroll records and includes a payroll register that lists the gross-to-net pay by employee. A check is issued for each employee's net pay and recorded by check number in the payroll register.

Payroll records should be reconciled with payroll out for each employee's records and the payroll journal.

Insights

--It is helpful to pay on a set day every week or every month, for bookkeeping purposes.

--It is wise to have a folder for each employee containing employment application, hiring approval, authorized rate of pay, deductions and other information authorized by the employee or required by the company or government.

8. Establish Credit and Collection Terms and Policies

The community management committee should approve each credit extension and credit limit. Extend modest credit if reference check is favorable. Provide

credit for one week's groceries and ask for payment before more is extended. It is wise not to extend additional credit to past-due debtors unless unusual circumstances are present and more credit is warranted.

Insights

It is wise not to give credit unless local commercial practices force it. (Extending credit means increasing the store's need for capital.) Too liberal a credit policy may cause a shortage in working capital, excess collection costs, or bad debt losses. Too conservative policy may cut down sales to an unnecessary extent. Pay a visit to credit customers who are overdue on their accounts at least monthly and collect something each month toward each account.

9. Prepare Initial Financial Statements

Review the explanation provided at the end of this section. Reconcile the bank account. Total and cross add the cash receipts and disbursements book pages. (This means add the columns down and across the bottom until like columns match.) Reconcile total receipts in the cash receipts book to total bank deposits. Reconcile total cash disbursements to the check book.

Create the income statement by:

- (1) Summarize the sales from the daily sales sheets.
- (2) Take a physical inventory, count, price it at cost price from invoices and summarize it as one total. (See stock check form on page 28.)
- (3) Calculate the cost of sales.

last month's inventory value		A
+ <u>amount of inventory purchased</u>		<u>+ B</u>
Subtotal		A + B
- <u>end of the month inventory value</u>		<u>- C</u>
Subtotal		A + B - C

- (4) List and subtract the various expenses from the cash disbursements records and calculate the net profit.
- (5) Create the monthly balance sheet.
- (6) List the current assets of:
 - (a) the cash balance in the check book
 - (b) accounts receivable which is the total of the open charge slip books should equal the total in the Cash Receipts book for accounts receivable minus the amount paid on accounts
 - (c) inventory value of the ending inventory used above in the income statement.
- (7) List the value of the fixed assets. This figure changes with depreciation expense each month.
- (8) List the current liabilities, which is the balance of any accounts with vendors that are payable and the balance on any loans that are payable at month's end.
- (9) List the capital and accumulated profits to the business.
- (10) Assets minus liabilities should equal the capital in the business.

A copy of the monthly financial statement and cash flow statement need to be sent to Global Management Centrum. Sample forms for these are found on page 44 and page 33).

Insights

--Financial statements are key to knowing how the store is doing. Start preparing these statements early. For example, the November statement should be completed by December 10.

--A financial statement is to the retail store's advantage. A Guardian or a CPA firm would be of assistance in preparing the financial statement until the procedure is clearly learned.

Global Operations Centrum: Chicago	CATEGORIES FOR FINANCIAL STATEMENTS	Retail Manual December 1977
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<p>EARNINGS STATEMENT: Also called Profit & Loss Statement, Statement of Income & Expense. The results of the business operation during a period of time.</p>	
<p><u>SALES</u></p>	
less	<u>EXPENSE OF MERCHANDISE</u>
<p>equals <u>GROSS PROFIT</u></p>	
less	<u>OPERATING EXPENSES</u>
<p>equals <u>PROFIT (OR LOSS) BEFORE TAXES</u></p>	
less	<u>TAXES</u>
<p>equals <u>NET PROFIT (OR LOSS)</u></p>	
<p>THIS IS WHAT'S LEFT FOR:</p>	
	Debt Repayment
	Withdrawal by Owner
	Dividends to Stockholders
	Reinvestment in the Business

<p>RECONCILEMENT OF NET WORTH</p>	
<p><u>NET WORTH RECONCILIATION:</u> Shows how your net worth increased or decreased during the period covered in the Earnings Statement.</p>	
NET WORTH AT THE BEGINNING OF THE PERIOD	\$ _____
ADD: NET PROFIT (or subtract net loss)	\$ _____
OTHER ADDITIONS: (if any)	\$ _____
<p>For example: More capital invested by owner (if a proprietorship) or more stock sold (if a corporation)</p>	
LESS: DIVIDENDS OR WITHDRAWALS	\$ _____
<u>NET WORTH AS SHOWN ON BALANCE SHEET</u>	\$ _____

ASSETS: what the business owns.

LIABILITIES: What the business owes to both creditors and owners. Creditors' claims are called LIABILITIES. Owner's claims are called NET WORTH.

CURRENT ASSETS: Cash and things which will become cash within the next 12 months.

CASH: Money in hand, in the bank.

ACCOUNTS RECEIVABLE: What the customers owe the business for merchandise or services they bought.

INVENTORY: Merchandise on hand:

- (1) ready to be sold
- (2) in some stage of production
- (3) raw material

CURRENT LIABILITIES: Debts to be paid within the next 12 months.

NOTES PAYABLE: IOU Bank or Trade creditors

ACCOUNTS PAYABLE: IOU Trade and Suppliers

TAXES: IOU Government

FIXED ASSETS: Used in the operation of the business, not intended for resale.

REAL ESTATE: Land and buildings used by the business. List at original cost.

LEASEHOLD IMPROVEMENTS: Permanent installations--remodeling or refurbishing of the store.

MACHINERY, EQUIPMENT, VEHICLES: Used by the business. List at original cost.

Less accumulated Depreciation: These assets (except land) lose value through wear, tear and age. This loss of value is a business expense; accumulated depreciation is the running total of this loss.

LONG TERM LIABILITIES: Debts to be paid beyond the next 12 months.

MORTGAGE: On property

NET WORTH: Owner's (or stockholders') claim on the assets of the business; his investment; his equity in the business.

For Proprietorship or Partnership:
MR. OWNER, CAPITAL: Owner's original investment + any reinvested profits.

For Corporation:
CAPITAL STOCK: Value assigned to the original stock issue. If the stock sold for more than the assigned value, the excess will show as: PAID IN SURPLUS.

RETAINED EARNINGS: Profits reinvested in the business AFTER dividends.

BALANCE SHEET EQUATION:

ASSETS = LIABILITIES + NET WORTH

VIII. SET UP AND INITIATION: PERSONNEL

1. Determine Staffing Patterns and Assignments

Decisions are needed that establish personnel guidelines to be in accord with the community's shifts in work patterns. Guidelines need to be established in the arenas of (1) part-time/full-time employees, (2) the roles and responsibilities of each employee that are practically written and (3) the system of selection for hiring employees. These guidelines need to be contexted for the community. Employee collegiums are an opportunity to practically work through the systems that build the employees into a team, whose role is to provide merchandise for the community in a human style and at a profit to the store. Because employees are involved in other activities in the community, their vision of working in the store as a means of personal income will get broadened to engagement in responsibility for the project as a whole.

2. Establish Personnel Policies

Personnel policies need to be established in order to objectify store operations. The following situations need to be examined: (1) the number of sick days per month, (2) the number of personal business days per month, (3) maternity leave, (4) holiday leave that is considered to be paid or unpaid, (5) grounds for ending employment. The benefits (such as social security in the USA) or taxes (such as income tax in the USA) that may be required by the government to be deducted from wages need to be carefully explained to employees. The explanation of benefits the store will set up and pay for the employee also needs to be examined, such as health benefits, profit sharing, insurance and savings plan.

3. Initiate On-The-Job Training

On-the-job training is the key to an effective retail store, particularly including what the Institute knows about space design and space care, time design and rhythm, momentum, and enlivening engagement opportunities. Community residents without much formal education find the technique of working with each other in a task and then reflecting upon it through the art form method brings self-consciousness to what has happened and is a powerful training tool. The principles of merchandising, bookkeeping procedures, inventory flow and control are often learned first by seeing the tasks done and then doing these themselves. An employee most often learns personnel relations through copying the style of an auxiliary whom he respects.

4. Establish Attendance Records

Signing in on a time sheet, writing the time of arrival and departure gives objectivity and enables an employee to be self-conscious of the demands on his time. This also gives the opportunity to teach the employee how to tell time and write his name and time for himself. Checking needs to be done on performance standards. Creating the list of objective things that have to be done daily in the store and allowing the team of employees to have specific assignments will encourage team work and is a way to check performance without any personal offense. Questions such as the following need to be decided: (1) Should the policies and benefits be the same for part-time and full-time employees? (2) What system of incentives needs to be established for both steady attendance and quality work?

5. Investigate Alternative Pay Schemes

In a retail store a though through plan for employee discounts needs to be established. From the store's viewpoint, discounts keep employees from buying from the competition and can be a deterrent to employee stealing. One drawback of a liberal discount is employees buying for their friends which cuts down on the profit of the store. One way to control that is to set a limit on the amount of discount allowed each week or month based upon the employee's family size.

Savings programs may also be established in order to train employees in structured ways to save for participation in global events and preparation for family emergencies.

6. Create Employee Morale

The employees morale is dependent upon the cleanliness of the space, the decor in the space, the engagement in the other aspects of the project, and celebration. Employee can each be assigned space to keep clean, both public space and space in the storage area. Thought needs to be given to rotating these assignments on a monthly basis. Each employee needs some space that is his in which to keep his own things, although it may have to be quite small at first due to limited space. Remember to keep the employee latrine and lounge clean and ordered.

Permanent decor that symbolizes the community's heritage, as well as seasonal decor needs to be planned. This can be done cheaply with some planning, using things that are native to the area or which vendors supply. Allowing employees to participate in doing the decor will help in producing a positive morale. Rehearsing the story of the relationship of the retail store to the overall community improvements is an ongoing task. A quarterly time for ritual, song, and symbol creation may be helpful, with perhaps one new item each quarter.

Employee morale will be greatly enhanced as employees are involved in other events of the project. Most logically, this may be the commerce guild or it may be literacy and English classes. Particularly when the store hours are long, ways for employees to participate in community-wide events like assemblies, workdays, and celebrations need to be created. When the retail store is called upon to give a community report, make this a total store employee session for creating the report.

Inyan Wakagapi
Quarter II, 1977

6 WEEK TRAINING OF STORE EMPLOYEES
(Sample)
(30 minute meeting each day)

Week 1 CLERKING	<ul style="list-style-type: none">- Stocking shelves and restocking- Making change/refunds/cash payments accounts- Locking up- Change stock arrangements as you discover what needs to be up front and obvious before consumer
Week 2 SALES	<ul style="list-style-type: none">- Design sales flyer (advertising store and 2-3 items on sale)- Getting merchandise before the customer- Design and put up weekly sales chart for store- Review items that are selling the fastest- Decide and put 2-3 low selling items on sale- Ritual: Why reinvest cash receipts immediately into more inventory? SALES MAKE MORE SALES!- First salary checks
Week 3 INVENTORY	<ul style="list-style-type: none">- Wholesalers trip into Bismarck- Contact wholeslaers to investigate expense for additional inventory- Set up inventory control system- Begin to check cheaper sources for wholesale purchase for inventory
Week 4 CUSTOMER RELATIONS	<ul style="list-style-type: none">- Set up customer survey forms and box to help determine reactions to hours open and merchandise needs- Make charts and lists to post that tell new products
Week 5 ACCOUNTING SYSTEMS	<ul style="list-style-type: none">- One employee chosen to learn cashing up- Train one employee to make entries for sales/expenses each day after cashing up- Assign individuals 3 day study from Basic Accounting Book in these arenas: (1) sales, (2) cash receipts, (3) cash disbursement
Week 6 MANAGEMENT DECISIONS	<ul style="list-style-type: none">- ICA staff leaves store intentionally for 2, then 3, then 4 hours, etc.- Maintenance of facility- Offering second employee opportunity to learn cashing up and hiring one new employee that the first two employees can help train

IX. PROFITABLE OPERATION: MERCHANDISING

1. Establish re-order procedures
2. Initiate sales incentive scheme
3. Evaluate consumer feedback
4. Evaluate sales prices, margins and stock status
5. Update sales projections

X. PROFITABLE OPERATION: OPERATIONS

1. Schedule stock rotation
2. Design quality control
3. Review space design
4. Estimate stock losses
5. Evaluate security system

XI. PROFITABLE OPERATION: FINANCE

1. Begin loan repayment
2. Inventory control
3. Tax calendar
4. Prepare regular financial statements
5. Initiate managements services
6. Update cash projections

XII. PROFITABLE OPERATION: PERSONNEL

1. Employee meetings
2. Time sheet analysis and payroll preparation
3. Personnel training
4. Review staffing patterns and personnel policies
5. Monitor performance standards
6. Hold profitability celebration

XIII. DIVERSIFICATION AND EXPANSION: MERCHANDISING

1. Increase variety of products

Determine additional merchandise the community has to go outside the community to purchase. Build a timeline over a period of a year of what lines to add. A guideline is to add a new line or expand a line each month. Prepare special advertising for the new products to promote their sales. Start with the basics in a line and a small variety. Add to the line as the demand grows. For example: if the new line is to be cosmetics, get from a wholesaler the basic products of lipstick, powder, nail polish, etc. and procure perhaps four shades. Vary the types of new product lines. Do some more practical products (like hardware) and more luxury products (like cosmetics). As the community income increases with better agriculture and more industrial positions, customers have more money to spend. In expanding lines or adding new lines, look for those lines which will give a large mark-up as a way to increase profits.

2. Expand market area

3. Refurbish and expand floor space

XIV. DIVERSIFICATION AND EXPANSION: OPERATIONS

1. Evaluate storage requirements

2. Evaluate space design

3. Evaluate equipment usage

4. Reivew new product requirements

XV. DIVERSIFICATION AND EXPANSION: FINANCE

1. Determine profit distribution

2. Determine expansion capital requirements

3. Obtain refinancing

XVI. DIVERSIFICATION AND EXPANSION: PERSONNEL

1. Hire supplemental staff

2. Offer staff salary increase

3. Hire branch manager

GLOSSARY OF RETAIL TERMS

- Accumulated Profits--profits over a period of time
- Annual Sales Projection--best estimate of the amount of sales in a year
- Averaged--adding a set of numbers together and dividing by the number in the set
- Calculate--putting together the factors that determine the value of something
- Capital--money, products, or equipment capable of being used in the running of the store
- Collateral--products of value that can be agreed to be used as guarantee that borrowed money will be repaid
- Consignment--receiving products that can be returned to the wholesaler if they are not sold
- Debt Payments--payments on things the store owes people for
- Depreciation--a calculation that is deducted monthly from assets that are, because of their use (like a facility or equipment), of less value
- Diversification--the store selling a large variety of products
- Expansion--making the store larger with more products and/or more space
- Feasibility--determining if the appropriate ingredients are there to produce a profit
- Gross Profit--the difference between the cost of a product and the income from the sale of the product
- Lessee--a person who is leasing something from the owner
- Lessor--a person who owns something and is leasing it to another person
- Lien--a claim, usually financial, against a facility or other asset
- Mark-up--the amount added on to the wholesale expense of a product to cover the store's operating expenses.
- Median--the middle number in a series of numbers
- Merchandise--the products sold in the store
- Outlet--a business where a particular product line can be bought
- Product Line--a group of products that are closely related by type
- Profitable--taking in more money than is spent on inventory and operating expenses
- Reconcile--to bring into agreement two ways of determining a balance
- Recycling--reusing a product sometimes in a new form
- Refining--making a procedure easier to do
- Sales Volume--the amount of sales
- Stock--the inventory of merchandise on the shelves
- Stocking--putting products on the shelves
- Systems--things that, related together, provide a method for doing a procedure repeatedly
- Turn Over--as all products of a type are sold in a period of time
- Warehousing Methods--methods that are used to keep a wholesale warehouse ordered. These can also be used in the storage room of the community store.
- Wholesale--buying products in case lots at a lower price than the store will sell them for

1. Materials Delivery:

The logistics dynamic enables the maneuver by doing materials preparation independent of set-up time. It is recommended that:

- a. A key materials check list for set-up and orchestration be created.
- b. All materials packets be pulled together before on the road setup begins.
- c. Decide on appropriate printing sources and equipment and secure.
- d. Include a block of time for production on a regular basis in the overall logistics plan.

2. Area Debriefing:

Each maneuver debriefs weekly in a format consistent for the entire maneuver. A tracking chart is helpful for sharing the status of a maneuver across the area. To compile a tracking chart, each house writes 2-4 sentences holding the victories of the week and statistics including town meetings done, counties broken open, money developed, etc. This data may then be brought together in chart form and disseminated to all houses in time for the next debriefing.

3. Practical Enablement

The practical enablement of the maneuver, food, lodging and transportation is planned ahead of the maneuver so as not to intrude into the town meeting set up time. Lodging is imaginably set-up on a quarter basis including motels, colleagues and friends' homes, tents and campers, etc. The circuiter supplies himself with a nutritious diet rehearsing that he is a demonstration to India through carrying his commissary with him, shopping at all the local supermarkets etc. Transportation care includes locating maneuver-length loans of cars and credit cards, preventative maintenance, imaginal leanliness and emergency planning. This is enabled through a comprehensive automotive checklist including materials to have with you, hazards that may be encountered, and the report upon returning from the circuit.

4. Adequate Advance Planning

An adequate advance plan, including all aspects of logistics, in kind, assignments design, rhythms, etc. prior to and including the whole period of the maneuver or operation, releases effectivity for set-up, development and authorization.

5. Maneuver Designs and Rhythm

Clean blocks of time must be allocated for logistics work within the overall maneuver as well as within the weekly timeline. Detailed three week advanced planning is essential to logistics happening, set within the context of the quarter and a particular maneuver, Giving imaginal names to maneuver sweeps or blocks of time helps focus activity. Compile a specific list of needs or request relative to logistics support available for house and colleagues.

6. Metro Colleague Engagement

The edge in metro colleague engagement next quarter will be bringing intentionality into the use of their time, roles, training, homes, cars, etc. A metro colleague is anyone who lives in the metro whether they live in a religious or not. One aspect of this will be structuring time to creatively think through the context, stories, short courses that will release metro colleagues to engage in the maneuver. Some contexts may not be obvious. One example that worked with at least one metro colleague: "In the light of our decision to have a town meeting in every county in the country, we need to get you trained in doing _____." Another aspect is that we will stop being timid about asking people to commit themselves and their resources. One area got fourteen people to commit themselves to be under assignment for a year at a meeting in September. A third aspect is that we will break out of static ideas about what certain colleagues will do. For example, we will find new ways to engage colleagues who live a long distance from the house (e. g. circuit outposts) or who have floated away because they have not seen a way to plug in (e. g. circuiting on Friday and Saturday or on Monday). As another example, we will find new ways to engage cluster youth (assigning them to be part of an orchestrator team to enable the set-up, decoring, or even leading a workshop.)

7. Weekly Rhythms

The challenge for logistics is an interior design of the maneuver that effectively focuses time and energy of the troops so action is significated and motivity is maintained. The proposed directions are:

- a. A corporate public calendar holding the quarter's time design and images of weekly missional focus and bi-weekly metro events.
- b. A weekly articulation of the miracles of the week including an image of Day II and Week II.
- c. A phasing model permitting clean blocks of time to be designated for particular tasks, reflection, celebration and discontinuous time.

North American

ARENA Maneuver Logistics

Advent

Continental Council

SEVEN DIRECTIONS WORKSHOP

Dec, 1977

LOGISTICS: Exemplary Action

CREATING
FUNCTIONAL
DESIGNS

ENGAGING
ALL THE
FORCES

THINKING
CONTRADICTIONALLY

TELLING
MIRACULOUS
STORIES

CONQUERING
IMPOSSIBLE
PRACTICES

**HARNESSING
"KINDRED"
GROUPS**

In the context of the comprehensive, missional peiorities, we create contexts and modesl that will allow groups with "kindred" concerns to engage in creating the victory. Our battleplan sets the terms of engagement. We enlist only groups met on the march. Examples might be university intern programs, Society of Friends, professional resource groups, Junior League or Appropriate Technology Institute.

**AREA
TRACKING
SYSTEMS**

Each area will set-up and maintain an effective tracking system which would keep a comprehensive picture of all assignments, hold a record of all persons who have been engaged in ICA tasks, provide a means for automatic update for continued and progressive involvement, and continually update and link movemental needs and troop potentials.

**ICA
STAFF
CONSULTANTS**

Capitalizing on ICA's growing image as consultants can be used to locate self-support salaries, networks of additional forces, authorization and program funding. Such consultant roles have been initiated through universities, county agents, agriculture extension service, county planning districts, local cities and church organizations. These provide more full-time and part-time troops for both GCF circuits and GSD auxiliaries for the North American 12, as well as access to new Guardians.

**SPECIFIC
TASK/TIME
ENGAGEMENT**

Asking colleagues and friends to commit themselves to a particular task for a given length of time is a needed breakthrough in engagement in the broader mission. This is done for Town Meeting circuiting and orchestration, for HDP consults, for special focus forums and for office coverage and House structure engagement. This may be done by short-term maneuvers and by continual recruitment.

**RECRUITMENT
STORY**

A direction in the forces expansion is the engaging of the local passion of Town Meeting grads in a wider context by revealing the indicative needs of nearby towns and the inter-relatedness of regional concerns.

**VOCATION
RAISING
OCCASIONS**

The trend is that people deepen their commitment on the other side of occasions which set the stage for the vocational question. The direction is toward creating such occasions and recontexting ourselves that every occasion is an opportunity to elicit engagement beyond the local community. Examples might be broadening mailing list for "Campaign News", supporting the "Campaign News" with a local newsletter, expanded uses of Town Meeting Assembly, Area Guardian meetings, Area Councils, RS-I, slide shows, impact courses.

North American

ARENA FORCES EXPANSION

Advent

Continental Council

SEVEN DIRECTIONS WORKSHOP

Dec, 1977

"FOLLOW ME"

Troop recruitment will be structured within awakening and engagement events, through tailored pitches during the events and individual requests for specific needs.

HDP
CONSULT
RECRUITMENT

The HDP consult is a deep address to one's vocation and is a primary engagement tool for posing the question of long-term commitment to the mission. The direction is to focus areal/regional maneuvers to recruit consultants for each HDP consult as a component for expanding the GST.

CONTEXT: Preparation for the saturation phase of GCF in North America requires thinking through our contradictions in several key arenas. The following statements are descriptions of these arenas, not statements of the contradiction. Some areas of North America have almost completed the county phase of GCF and will build their Q III battleplans focusing on launching the saturation phase in their areas. Other areas have considerable work to do in the county phase, yet even these areas will need to redo their battleplans for Q III. Thus all of the maneuvers in Q III will be either directly saturation phase maneuvers, or will be directly related to the saturation phase strategies of the area.

FUNDING PREPARATION: The first challenge lies in the arena of funding preparation. The growing visibility occasioned by the move to saturation as well as the greater numbers of local communities involved in further increased acceleration requires a decision on the public cost of "township" level meetings that will assure program self-support.

EXPERIMENTAL MODELS: The second challenge lies in the arena of experimental model development. The variety of questions which have emerged related to the catalytic role of communities which have had GCF during the county phase; the use of other impact tools to do saturation; the use of agency networks and township government structures; and the refinement of rapid set up models suggests the need for broad experimentation within continental guidelines to assure the maximal use of available weaponry and forces. Over the next 9 months we need several significant continental experiments that would prepare us for creating an appropriate model for moving on saturation by August.

TROOP MOMENTUM & READINESS: Once the 3100 counties of N.A. are completed we turn our attention to facing the approximately 20,000 "townships". To do this will require a veritable army. The issue now, therefore, is how we build continental force of colleagues who will stand ready to move on such a task. Key to this building is maintaining momentum in the campaign, both nationally and in house areas for both the Order and the movement colleagues and friends, as well as creating a series of events that train and prepare many, many more for the necessary roles in such a campaign.

RELATING TROOPS TO TERRAIN & OTHER 2 CAMPAIGNS: Moving beyond the one per county level raises dramatically the question of how we would saturate the terrain of townships across the continent. How would we initiate such a saturation? Would we use a local network across the geography? What would be our rational phasing across the continent? How would we relate this to the urban? The challenge here is to figure out how we would relate our troops to the terrain, the phasing of that, and how this intensification of the GCF campaign would be related to the intensification of the HDP's and the intensification of the needed global servant force.

SERVANT FORCE PUBLIC STORY: The situation of a limited geographic and political area will result in a new degree of public exposure, a higher profile than we have ever experienced as a movement. The

media will be reporting on GCF either with or without our invitation. This will require careful use of the public media on our part. To do this we will need to clarify how each maneuver guards the quality of awakening, as there is now no one available to turn over the awakening task to. This, then, requires a public story that relates our rationale of selection for saturation areas, as well as our intentions behind our saturation maneuvers. Saturation does mean more GCF's or numbers of forums. At the same time, it means this acceleration rests upon very specific strategic intents, which become part of our public story.

1. anticipation thru current work

In order to enable saturation we propose to build models which anticipate specific saturation through do-ment of the counties by: set-up of school district wide and other consultant project, and using regional resource agencies (ext. service, conservation dept, resource conservation and development projects).

2. capitalizing on receptive climate

In order to enable geographic saturation, we propose to capitalize on the receptive climate of past town meetings through collecting and publishing miracle stories and essential statistics (names) from diverse communities highlighting those that are self-conscious about the impact of Town Meeting and are using Town Meeting methods with visible results. This will enable publicity, set-up, funding, HDP site selection, orchestrator training and availability and adopt a village.

3. using local networks

In order to enable saturation, we propose to "use" networks to create a receptivity to the TM movement, through regular mailings of newsletters via network channels, meetings or meals to introduce networks to ICA (it takes 6-months to get a network decision), using agencies & networks and/or local chapters for one-per-county set-up, and consultations with agencies.

4. relation to HDP and impact courses

In order to enable geographical saturation, we propose to establish continuing, supportive relationships between communities engaged in the GSD experiment and neighboring communities and counties through saturation of these counties with impact courses (LENS, GWF, FCF) Examples: Holding GWF and LENS to recruit HDP consultants, Use GCF as a training tool for HDP communities or use county saturation to select HDP site. Pace residents undertaking Town Meetings in Mississippi and Wichita, and county saturation to build a broad base of financial, in-kind and authorizations support.

5. creating positive recognition

In order to enable saturation, we propose to enable funding and authorization by creating a broad base of positive recognition of Town Meeting through regular newsletter distribution through establish networks, capitalizing on incorporation willingness to fund TM's in their local communities, building a broad donor base, and gaining the support of important public and private networks.

6. pilots and current experiences

In order to enable saturation, we propose that each area carefully screen its current experience and trends to develop a pilot county saturation project. Each area will implement its pilot project before the end of the year. Each area will pull together its learnings about saturation in preparation for summer research, particularly in the areas of authorization and funding, networks, troop usage, story and intent, the Town Meeting day itself, logistics and results.

7. TM assemblies

In order to enable Town Meeting saturation, we propose state-by-state Town Meeting Assemblies to signalize regional authorization and to elicit the decision from participants to engage in saturation set-up.

MOVEMENT RATIONALE: The missional rationale for the movement in initiating 12 new projects in the Continental United States is part of a Global Strategy designed to expand the placement of demonstration communities in the nation which represents our current advantage and strength. The Geo-social grid of the 24 regions of the United States will serve as an overlay which gives direction to locate the strategic site of each project. These projects would be staffed by the relocation of 12 metro houses in the new sites. In addition, these projects will assist in releasing the 15% represented in the U.S. in service to the globe. These 12 demonstration projects will utilize the break-loose of the Town Meeting campaign as we seek to secure the authorization, framing and funding in order to release the resources, troops and expertise to be set-up previous to the initiation of the new projects.

**SOCIO-ECONOMIC
SCREEN:**

In preparation for the site selection of the next 12 Human Development Projects in the United States, the socio-economic screen used needs to emphasize a focus on the rural communities with visible deprivation, communities that are cut-off from the mainstream, but easily accessible and that show signs of being capable of rapid economic development.

**COMPREHENSIVE
NATIONAL
DEMONSTRATION:**

We are out to release a comprehensive national demonstration of human development. A comprehensive demonstration means the key contradictions of the nation are addressed; the major ethnic groups are included, projects are geographically spread, the economic diversity of the nation is taken into account, and the projects are focused on arenas of national sensitivity. In the U.S., projects are now being done with the urban and rural blacks and with Plains Indians. Other arenas of sensitivity to be addressed are Latino and Southwest Indian communities, migrant communities, Appalachian mountain villages, ex-mining communities, farming and mill towns and other such communities where major economic base has diminished. Such sites are chosen to enable maximum engagement by the forces of the seven revolutions and to significantly impact the mainstream and life-style of the Nation.

**TOWN MEETING
RELATIONSHIP:**

Human Development Projects in relationship to the Town Meeting communities are a concrete sign of awakened communities in action. As such visibility and accessibility, a demonstration with 4 to 5 hours of travel from any community in the U.S.A., and the periodic training and opportunities for engagement of town meeting participants and metro colleagues is essential. Also the opportunity for demonstration community residents to do Town Meetings in surrounding communities both grounds the principle of global servant hood and expands the visibility of the project itself. Town Meetings do demonstrations. Demonstrations do Town Meetings. THOSE WHO CARE do both.

**EXPANSION
PHASING:**

The expansion phase of G.S.D. in the U.S.A. was begun in 1977 with the initiation and acceleration of the 4 H.D.P's. In 1978 we are expanding with twelve additional H.D.P's, 3 per area in the U.S.A. In 1979, 8 more will be added so that every region in the U.S.A. will have 1 project. In 1980, every house, or 48 total, will have initiated an H.D.P., resulting in 2 per region.

**REPLICATION
VISION:**

The emerging consensus relative to the vision of replication across the United States is that it will cover the rural, urban, ethnic and the mainstream of Society in America. The relationship to the whole globe is significant in terms of how demonstrations provide replication models and release new troops for the rest of the globe. The remaining urban signals would be phased in at a time when we're able, because of long experience and urban saturation, to create a rapid visible sign. Among the many ethnic groups across the U.S., the replication will include the primary groups of Chicano, Latino, Indian, Black and Appalachian. The Mainstream refers to those locations which touch the broad historical consciousness of the Nation.

**LOGISTICS
SET-UP:**

The proposed direction for the logistical set up of the 12 new projects is that initial training be done by transposing Town Meeting support toward G.S.D.: that funding be secured from public and private sources on both national and local levels and that the commitment be secured before the consult for both project and staff support. Consults will be coordinated nationally for maximum impact across the nations. Consideration should be given to the possibility of holding the 12 consults in the month of August with the framing and funding in place and the auxiliary on site by the end of June. Site selection will be finalized by an experienced global team from outside the area. Engagement of guardians and other colleagues for long and short term maximum effectiveness is critical for project staffing. A key to securing effective new staff for auxiliary participation will be the consideration of a Human Development Training School to be held in North America in Quarter IV.

IMPACT COURSES: The Magnificent Seven Revolutions have reached a ready state of development. People, organizations and institutions requesting training indicate a rise in methods training. Local organizations with national concerns looking for ways to focus their input, find impact courses an ideal opportunity. The anticipated expansion of program and our present capability to respond indicate urban houses will again create quarterly training schedules.

CONSULTANT SERVICES TRAINING: Consultant Services Training is the long range extension of self-support whereby salaries or funding is received for work already being done in projects and circuiting. For economic and political consultation in outside areas, it is the primary means of maximizing the time available for direct involvement in project operations while providing maximum income. And finally, it is an effective process for engaging people (customers) in the on-going services while giving broader authorization and recognition for further movement activities.

NURTURING THE MOVEMENT: In order to intensify the intraglobal movement campaign, we propose the urban houses do formulation by catalyzing and sustaining the engagement of colleagues through strategies such as metro circuits and religious life demonstration. This requires experimentation with effective ways to follow up impact campaigns.

INTERNAL STRUCTURING: The future direction of Urban Mission as logistical center requires transnational organization of troops in order to get everyone engaged, such as 1) structuring by task (i.e. funding, set-up, materials) rather than by campaigns; 2) embodying the internal training structures of the House (i.e. Daily Office, Ecclesiola, Collegium) within both "small-House" and circuit structures.

LOGISTICAL CENTER: In light of the trend toward geographic dispersion of troops, it is increasingly critical that the Urban House play the role of logistical support and coordination center. The tasks include marshalling authorization networks, materials production, development, in-kind and troop enlistment. This will be necessary for Human Development Projects, Town Meetings and Impact Courses. Playing this role, the house is the watchdog of the comprehensive, the source of initiating correctives and a center for debriefing and restrategizing.

FUTURIC THINKING: In light of what we have learned about framing effectively in the urban and suburban communities in the last three years, a future direction would be a regestalt of perspective in relationship to our urban work. This would include the relationship of the urban house to its primal community, the relation to the historical church and the necessary continuity to maintain effective operation.

SATURATION: The Urban House is perpetually engaged in the task of radical awakening --engagement in its immediate geographical area. In order to prepare the way for saturation, distinct geographical areas will be tackled head on with existing groups as targets for Town Meetings that within the next 6 months initial experimentation would be done in terms of how to do meetings most effectively in metropolitan centers including with age groups, agencies, neighborhoods, churches, schools, unions, factories and other forms of urban identity. For the sake of the future exceptional attention will be given to comprehensive funding and framing, manuever self-support, logistics, mass participation, metro colleague engagement, local leadership training, rapid set-up and flexible T.M. formats.

IMPACT COURSES: The magnificent Seven Revolutions have reached a ready state of development. People, organizations and institutions requesting training indicate a rise in methods training. Local organizations with national concerns looking for ways to focus their input, find impact courses an ideal opportunity. The anticipated expansion of program and our present capability to respond indicate urban houses will again create quarterly training schedules.

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INTERNAL STRUCTURING: The future direction of Urban Mission as logistical center requires transactional organization of troops in order to get everyone engaged, such as 1) structuring by task (i.e. funding, set-up, materials) rather than by campaigns; 2) embodying the internal training structures of the house (i.e. Daily Office, Ecclesial, Collegium) within both "small-house" and circuit structures.

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FUTURIC THINKING: In light of what we have learned about framing effectively in the urban and suburban communities in the last three years, a future direction would be a reexamination of perspective in relationship to our urban work. This would include the relationship of the Urban House to its primary community, the relation to the historical church and the necessary continuity to maintain effective operation.

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Attention will be given to the areas of comprehensive funding, leadership training, and self-support.

CONTRIBUTOR'S LIST

Western North Carolina Town Meeting

November, 1977

McDONALD'S Asheville, N.C.	WESTERN SIZZLIN STEAK HOUSE Asheville, N.C.	LAND OF SKY RESTAURANT Asheville, N.C.
ARBY'S ROAST BEEF Asheville, N.C.	THE MOUNTAINEER INN Asheville, N.C.	
INN ON THE PLAZA Asheville, N.C.	JOHN YANCEY MOTOR HOTEL Asheville, N.C.	HOLIDAY INN Asheville, N.C.
RAMADA INN Asheville, N.C.	LIGHTHOUSE RESTAURANT Asheville, N.C.	
SHONEY'S BIG BOY Asheville, N.C.	QUALITY INN Franklin, N.C.	PONCHO'S LA CASITA RESTAURANT Asheville, N.C.
FARRELL'S Charlotte, N.C.	HARDEES Chain Charlotte, N.C.	
PIP Postal Instant Press Charlotte, N.C.	BELK PRINTING Charlotte, N.C.	

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Mary Reynolds Babcock Foundation and Duke Power Company

The Town Meeting: North Carolina Program was developed by the Institute of Cultural Affairs, a not-for-profit research, demonstration and training group concerned with the human factor in world development. The ICA staff and volunteer consultants in 47 American cities work with local sponsoring groups to coordinate program development and provide resources, training and follow-up services upon request. For future information, contact ICA, 1808 E. 7th Street, Charlotte, N.C. 28204, Telephone 704-333-8460.

In light of the funding resources currently available due to the 2,000 Town Meetings held and 60 GSDs established globally and the \$343,000 target for December to complete the year, it is recommended that \$1,200 per house be raised focusing on the story of Village Adoption. The basic elements of the story with the funding resources and images are listed below.

VILLAGE ADOPTION STORY

∞ The Movement across the globe stands in the victory circle of 2,000 Town Meetings and 60 HDP's. Twenty-four HDP's, every hour on the hour, stand as a sign of hope for all peoples.

India unveils a fascinating picture where 16 villages are experimenting with replication and have initiated an HDP with 20 more completed by Christmas.

The miracle of India is their decision to be self-sustaining by raising 94% of their program money within the country. We are enabling this miracle by raising 6% outside of India. Across North America we are concerned with raising \$48.00 or a breakdown of \$1,200 per House. For images of how these monies are used refer to the Development Packet that is available for each House. (The Village Adoption Program Budget, The Medical Challenge grant, along with the \$25.00 Gift Page) Also review images from the State of California Adopt a Village 3-page description. Those Who Care are always giving. We are asking Those Who Care at this Christmas season to symbolize their participation with a gift. Your contribution of \$\$\$\$ will help accelerate the victorious campaign of serving the world through the re-creation of local villages. This is not a question of whether your family is going to give but how much is going to give their participation in the sign of India replication.

FUNDING RESOURCES AND IMAGES

LAZARUS, COME FORTH This source consists of Old Movement grads from RS-1, PLC, Academy, LENS, HRMs, etc. and previous donors who are not currently giving. These names can be found in grad files, mailing lists, or old donor printouts. As these people may never have been contacted before, potential leads would be to talk about the practical application of the course they took, or doing Fifth City all across India.

I'LL BE HOME FOR CHRISTMAS This means that all former and present personal relationships will be considered a source that can be tapped on your request as an order family to meet program and personal needs, for example, your former churches, your family contribution, your parents, brothers, sisters, cousins, Aunts etc, other order member churches, college and fraternity friends and contacts, employment colleagues past and present, business associates.

SEASONAL SOFT SPOT Christmas gifts will be obtained from groups we have contacted before, i.e., churches, Rotary, YWCA who have discretionary funds or can take a special offering and from interested individuals within these groups.

A CHANCE TO CARE We will select targets from lists of participants of recent impact courses such as Town Meetings, especially steering committee members and excited participants, key women from GWF's and Youth Forum participants to contact for personal contributions. They will be asked for a specific contribution such as \$50.00 toward a GWF in India, or \$25.00 for a baby scale for a village being adopted. Excited Youth (some of them wealthy!) can be contacted by House Youth for their contributions.

SOLID SERVANT SOLICITATION Colleagues who have pledged regularly or have given recently will be asked for a special December gift to serve as the base for the \$1,200 village adoption drive in which everyone will participate at least symbolically. Prospective consult participants will be asked to complete their yearly pledge and to double their pledge for December.

WOMEN & CHILDREN FIRST Projected and scheduled youth and women Forums for Quarter III will be used as a focal point for raising money in December. Sources for this money include GWF and adult CYF grads (teacher, schools Superintendents), organizations that give exclusively to these causes, Town Meeting grads that are especially interested or are involved in youth and women's programs, and program fees for scheduled impact events paid in advance.

NO HANDOUT ICA offices which have committed TM fees still outstanding are requested to contact the appropriate community person to arrange for the pickup of these fees before Dec, 31, 1977, done with appropriate humility, graciousness, and forcefulness, in order to close our books for the year. Where towns were not asked for money, a possible tactic is approach them; "Some town paid for you, why not contribute money for the next town?" having a town meeting. In order to enable future Town Meeting funding, both in setup and at every TM, a statement should be made that this costs the ICA \$\$\$\$ (amount decided self-consciously by each particular maneuver), part of which is funded by major grants and part of which is raised within the state/province from individuals and businesses. This gives us a way to move on funding locally, immediately or later.

GROUP		TASK
1	PROJECTS EXPANSION	Develop a priority list for the next 12 projects in the USA in the context of planning for one per region.
2	URBAN MISSION	Create a working model for the task of the House, especially the permeators, in and around the cities in which Houses are located.
3	MANEUVER LOGISTICS	Design models for logistical support of maneuvers, especially smaller maneuvers consisting of two-six people.
4	FORCES EXPANSION	Suggest methods to be used to recruit and train additional HDP staff, GCF circuiters and guardians.
5	FUNDING DESIGNS	Develop models for coordinated GCF funding work including all troops and all services.
6	SATURATION PREPARATION	Create models for the use of the Assembly, publications, stories, and intentional mythology to prepare territory for saturation.
7	CONTINENTAL CALENDAR	Create a draft calendar for Quarters III and IV with projected dates for GCF victories and other campaign dates.
PROCEDURES		<p>The product will be a one-page statement of the seven emerging directions in the assigned arena.</p> <ol style="list-style-type: none">1. Brainstorm and discuss the issues in your arena.2. State the basic contradiction.3. Discern and articulate the emerging trends.4. Decide the seven proposed directions.5. Write a short paragraph for each.6. Type and take to the Regulatory.

450

THE CAMPAIGN LEARNINGS

NORTH AMERICAN COUNCIL

ADVENT 1977

1. Effective Dispersement - The missional nurture of our dispersed troops lies in constantly maintaining the crucial tensions of localizing our immediate concern for local communities along with globalizing our long-range concerns in the local house dynamic through intantional discontinuity in the midst of direct mission.
2. Objective Reports - Objective reporting of victories and blocks builds a corporate mind necessary for creating the constructs to keep us missionally on target (e.g. maneuver mid-course corrections)
3. Regular Intexchange - The regular interchange between circuit teams and the R.M. and between Houses and Centrum troops are crucial for providing missional objectivity
4. Quarterly Designs - Quarterly designs are critical, especially in situations where subjectivity and immediacy are likely to dominate (i.e. small houses, circuit teams.) They push comprehensiveness & depth in all aspects of mission, spirit journey and practical tasks.
5. Order Pillars - The soundness and adequacy of the principles and marks of Order life - House Church, Ecclesiola, Collegium, etc.- are not changed by the number of residents in or the spirit state of the House.
6. Practical Structures - The "tighter" the structures, the greater the success in practical doing. Deciding to stay within those structures allows the necessary focus. This is true in everything from maintaining the format of the weekly planning and reporting meeting, to weekly team-check meetings and structuring auto conversatns.
7. Assignment Schemes - Using assignment rhythms & troop configurations is more effective than dividing responsibilities. (e.g. special blitzes with the whole House on one task; assigning tasks to teams rather than to individuals.)
8. Daily Collegium - Collegium is crucial to maintaining the long range vision for every House. Input is essential to the collegium dynamic, even in a time of dispersed or small numbers. A common design can be used in various locations with a reporting plan for getting the wisdom shared. Consensus building involves creative tension; therefore, participation is key.
9. Common Spirit - In a time of dispersion, corporate debriefing and imaginal study become a spirit event which allows many efforts to become one thrust.
10. Solitary Journal - The quick availability and the common use of the solitary journal and the red book empower them as tools which sustain the common spirit.
11. Specific Engagement - Specific assignments that relate the individual or group to the larger common mission of doing the global priorities build a corporate movement. The direct engagement of permeators and metro colleagues in Town Meeting, HDP's and Impact Courses fosters unity.
12. Decor/ Celebrations - Decor & celebrations that reflect the latest situation and are functional become a poetic rehearsal of the victory just accomplished (e.g. colouring continental county map yellow).
13. Space Design - In a time of dispersion space becomes more important as it imagin-ally articulates the immediate and long range mission. We set up our space commonly and use it representationally.
14. Religious House - The Religious House is primal community involving worship, study, discipline and mission. Each of these elements is essential to its effective engagement. As a stake the task of the Religious House is to intensify the consciousness of the Other World, thus allowing the external mission to be genuinely transestablishment.

1. Research existing networks to provide regional authorization and access into local towns: the focus of authorization is to make local contacts comfortable with us.
2. Remember the major advantage of finding economic support for TM on local level.
3. In order to effectively utilize time, troops and materials it is necessary to maintain full logistical coordination.
4. In order to sustain motivity it is necessary to clearly define the victory and name the maneuver.
5. Preprinted posters and flyers with space for local information need to be in circuiters hands from the onset. This facititates quickly and publicly establishing the TM as a fact in a community.
6. Letters, packets and media coverage prior to circuiters hitting the road creates appropriate atmosphere of expectancy.
7. Early conversations with people who know the geography reveal(critical) avenues and obstructions to local access.
8. Small evening Town Meetings facilitate colleague engagement but the committment of time happens before the maneuver begins.
9. Insuring set up of accommodations, telephone facilities and automobile servicing before hitting the road, reduces anxiety and increases effectivity of circuiters.
10. Bringing authorization figures fully up to date on maneuver condition provides maximum sponsorship in localities.
11. The selection of authorization in the midst of particular maneuvers includes consideration of long range needs for the three campaigns.
12. Published maneuver phasing plan for the year's objective informs what moves must be taken in each phase and sustains the troupe in the knowledge that all the territory is dealt with.
13. In the arena of funding we have learned that: (1) there are agencies and institutions willing the fund/salary the ICA to do GCF such as VISTA, community colleges, Campaign for Human Development; (2) the best sources for partial funding of specific TMs are Utilities, phone companies, local industries employing over 100, realtors, morticians, insurance agents, banks. Personal high level guardian referrals and requests from local person involved have been key.
14. Maximum funding occurs when it is solicited as a part of initial maneuver authorization, and is part of the initial local community set up.

Circuiter Decision	The key to rapid set-up is the circuiter's decision 1. to hold a Town Meeting in the one targeted town per county, 2. to set the date, 3. and to announce the great event to the town. The circuiter makes visits to secure arrangements and nods that enable increased attendance, and avoids any formal or informal decision-making structure. The circuiter finesses the yes in one day and leaves the town anticipating a great mysterious event.
Short-Term Set-up Pitch	Many times old images of cumbersome long-term planning for large community events blocks people from going ahead with a Town Meeting. The circuiter shifts the old images by making it clear that most Town Meetings can be set-up in 9 days or less because the set-up is simple and the method flexible enough to fit any number of people. In the conversation, a story is created with the local contact as to why they are having a Town Meeting in their town.
Instant Publicity	Local people are very encouraged and willing to move it if the things which normally consume their time are already done for them. For this reason, circuiters carry a publicity kit which includes a sample or "fill-in" news releases, radio announcements, posters and flyers. The circuiters make local assignments and hands out material for distribution or goes to the media himself.
Visible Signs	The learning in rapid set-up is to get the TM visibly announced by the appearance of fast, visible signs within the community by the circuiter such as large striking posters and brochures in key community locations. The event is imaged as being for the whole community which can be enhanced, for example, by providing a free meal for all who attend. The event should ideally contain an element of mystery, surprise together with an actual community event such as a meal.
Geographic Cluster Rationale	Setting up Town Meetings in a geographically proximate cluster allows better use of time and space. Planning visits to towns in contiguous counties over a short period allows towns to be visited more rapidly, local recent TM stories to be told to encourage neighboring towns and TM to be scheduled sequentially to reduce overlap.
Circuiter Momentum	The key to circuiter momentum is starting fresh with a new town each day. This means not letting loose ends, etc., from the previous towns detain the circuiter from moving on to a new county. This is necessary if we are to do 3000 counties by July, 1978.
Using Available Resources	In the midst of having learnings, guidelines and models, there are NO limitations finally, about who can do a community forum. Forums have been set up all days of the week, at any time of the day, with all kinds of groups and contacts. The key was in using all the resources that are available in each particular situation.

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11. A maneuver time-line requires a strategic reflection to happen continuously during a maneuver to focus on the present contradiction which allows for mid-course correction. These reflections inform the rest of the maneuver, relate to the over-all strategy, and link the particular maneuver to the global campaign.

12. A maneuver time design, in order to maintain troop motivity, requires focused time intervals that are less than a quarter long and have public kick-off and closure dates.

13. A maneuver time line requires a funding plan. Without a funding plan there will be no funds for maneuvering, Since development may take longer than set-up it should be initiated first. Sun Tzu says, "Get your gold pieces and chariots; then got to war."

14. A maneuver time line requires the use of flexible winning tactics such as using different pitches for different geographies, initiating the most helpful town meeting time design and format, creating new set-up forms to win, and deciding if and when to move on to the next town.

Economic Support	The learning of this quarter id that while TM's cost \$1200, we can do them for less, but we need not do them for free. Some experienced models include asking 10 local businesses for \$10 each, asking \$25 from banks in neighboring towns, and soliciting donations from local or county industries. These requests can be made in person, by phone or by mail.
Locating Set-up Authorization	Obtaining permission to set-up a Town Meeting is done by contacting individuals who have influence on groups or who are key authorization. To locate key persons ask casually who are those who care in the town, use people's professions or organizations as a clue to whom or how to approach. Approaching people as individuals as opposed to representatives of groups is usually more effective.
Troop Deployment	The basic set-up unit consists of two people. A mixed team of one woman and one man is the most strategic combination. Several teams working together avoid a protracted ampaign. This statement is about the future, training, and care for ourselves.
Choice of Targets	In choosing targets, circuiters keep in mind that we are dealing with sociological promise, therefore a town that thinks that it has only one big problem is less likely to participate. Citcuiters look for a small town away from the symbolic center of the county; in other words, a left-out town that is hungry for possibility. Circuiters avoid meeting with any decision-making group who could say yes or no to holding a Town Meeting, or, positively stated, we only hold a group meeting with individuals who have already said yes.
Regular Bombardment	The new learning in rapid set-up in the arena of attendance is the regular bombardment of every person in town from several directions, arranged by the circuiter before leaving town. Some examples include direct phone contact by local callers, radio announcements, newspaper articles, flyers sent home with elementary students, giving people set-up tasks, making sure all factions are represented, engaging local talkers, selling tickets at church, and informing persons where posters are put up. When most of these are used to publicize the Town Meeting, better attendance is assured.
Advocate of the Local	In rapid set-up, the circuiter does his homework on local regional customs in order to be identified as an authentic advocate of the local. Knowledge of farm talk, athletic rivalries, local geography, and other regional topics allows the circuiter to be imaged on the side of local man.
Demonstration Town Meeting	In town where town size, past relationship to Town Meeting, or scheduling difficulty create a climate of resisitance, the image of Demonstration Town Meeting creates a yes and may even be secured with a phone call or letter. A demonstration can often be done at the regular meeting of an established group and it may be possible to develop a web of Town Meetings using the same group in several towns.

1. Singing must not be done automatically and takes careful planning to pull it off as a group happening.
2. The initial Welcome and Context is a place to trim time. The essential opening dynamic can be maintained without the traditional jokes, introductions, and brief comments made that allow the quickest entry to the workshop.
3. The four basic steps of the challenge workshop are held in order to take the group on the journey of identifying the underlying contradictions of their community. Various factors within the situation, e.g. size of group and the experience of the workshop leaders, as well as various workshop gimmicks allow the time to be shortened.
4. The Interlude dynamic can be held by reading the story, talking about the symbol, and singing the community song, also reading corporately the challenge statements with a quick reflection on the first workshop, allowing everyone to see that a creative response can be made by the participants and lead them into the next workshop.
5. Proposals and their titles are to be concise, concrete and practical, honoring all the challenges,
6. Reflection insures the happening of Town Meeting is objectified in the minds of the participants and can happen throughout the event.
7. The document illustrates the practical seriousness of the event and enables follow through and in no situation is a document impossible to produce.
8. All five pillars are necessary to hold a Town Meeting. Great Town Meetings can be done in 3 to 4 hours with attention to a brisk pace and the planning for any dead spots. All orchestrator teams can drastically improve their situation with careful planning for each situation.
9. The New World and New Human spins are critical in preparing the participants for the Town Meeting event, especially in contexting the challenge and proposal workshops, and can be done effectively either informally or formally.
10. It is most helpful to have the decor and workshop materials set up before the Town Meeting begins with production set nearby in a fashion most conducive to eliciting everyone's wisdom.
11. Each Town Meeting is self supporting. Funds can be raised before, during, or after so that the community is aware that they are not participating in another handout.
12. Small groups require a more informal style, that transmits helpful social methods without loss of Town Meeting wisdom.
13. In whatever size meeting, breaking into team size groups insures every participant engages in producing results.
14. The song, story, symbol, workshop is most flexible, should be done, and needs a minimal number of participants.

Methodological Suggestions that have been used and found helpful in doing four-hour Town Meetings:

Welcoming

1. An introduction of orchestrators by a local person
2. Coffee and snacks to serve people as they arrive
3. Reading by whole group of pledge of allegiance or a quote from poster.
4. Prayer offered by a local person
5. Starting on time to honor those present and the timeline.

Opening Context and Spin

1. Walking through the workbook while giving the context provides a visual aid and orientates them to the workbook
2. Start with who we are as the ICA
3. Including an image of the day helps people to comprehend what is going to happen
4. Weaving the spin through-out the challenge workshop helps save time and gives helpful images from which to brainstorm
5. Doing the spin in a conversational tone entices participation from the start
6. Doing the spin with one story

Past-Present-Future Brainstorm

This is a context for challenge workshop and needs participation of whole group. There are 2 suggested ways to proceed:

- | | |
|--|---|
| (1) Brainstorm Past/Present/Future
break into 2 groups
Challenge workshop
Song/Story/Symbol | (2) Brainstorm Past/Future/Present
One group leaves for Song/Story/Symbol
Challenge workshop continues, using
previous work as launching pad |
|--|---|

Several specific questions are helpful for each section to get richer flow of info:

- | | |
|--|---|
| Past: history of name of town
key landmarks
historic events
key characters
Future: hopes
dreams | Present: concerns
interests
types of people
What people do |
|--|---|

Wouldn't it be great if _____.

2nd orchestrator makes second list of the present list so that data is readily accessible for challenge workshop.

Challenge Workshop

1. Index cards or 8 1/2 by 11 sheets of paper for brainstorm so they can be moved when clustering and can be handed to teams.
2. Moving toward more simple form for challenge statement has been helpful
3. A prepared flip chart with procedures for display during team work time.
4. Rather than sentence report form, teams write data on corporate chart. Orchestrator uses data to show how to write challenge statement and uses this as opportunity to push back and keep data concrete and practical.

Issues					
Arena					
Blocks					
Underlying Contradiction					
Illustrations					

Interlude

1. If Song/Story/Symbol workshop is done with challenges as a separate workshop, the interlude might be a time to present the drama of the song/story/symbol after the reflection on the challenges.
2. The song/story/symbol workshop may be done as part of your interlude after the reflection on the challenges.
3. The song/story/symbol workshop may be done with as few as one person.
4. The New Human Spin is a context for the proposals workshop which points to individual motivation.
5. This is imaged as a short break.

Proposals Workshop

1. The responses brainstorm may be contexted by the "see-do-think" short course. Get out examples of events that are visible, do-able, or planning activities.
2. With smaller forum, 9 or 10 practical responses are often enough to brainstorm.
3. In some cases, responses may be selected and assigned to teams to write into proposals rather than cross-gestaltting.
4. A wall chart containing all proposal areas with boxes for proposal components may be used, with a walk-through of one proposal as an example, and having teams fill in the chart instead of writing out large sheets.

Plenary

1. Pick an appropriate proposal. Praise it. Reflect on how it could be done, who, when, what, where.
2. Use of toasts is still effective.
3. Do a send out.
4. Present symbol to a "guardian" in the plenary.
5. Pass the hat and/or do a contribution spin.
6. Do Assembly spin and registration spin (if appropriate).
7. It may be helpful to include a rehearsal of ICA spin briefly with reference to non-profit and NPPs as an example of follow-up along with Assembly spin.
8. Ask questions to reflect on the event, significance of the event.

1. SHOWCASE MENTALITY ESTABLISHED: Because the six projects are places where people interested in the ICA come to visit to get a vision of what is possible in their own communities, it is key to establish a mindset of ongoing, visible, community structures, as well as an environment which is constantly ready to receive guests.
2. SELF-CONSCIOUS TRAINED LEADERSHIP: A broad base of community residents who have internalized the basic methods of MDP who operate as colleagues and are self-conscious about the MDP as part of a band of those who care around the globe will be established.
3. PROGRAMATIC STRUCTURES FORMULATED: Each programatic arena has at least one structure functioning on a self-sustaining basis and their inclusive operations and results have been documented against the original two-year plan.
4. COMMUNITY CONSENSUS STRUCTURE: Completion will see community decision making structures, such as stakes, guilds and community congresses and assemblies as part of the regular calendar of the community, participated in by a large number of community people who see that their power and their freedom lies in regular corporate consensus decision making and planning. These stake, guild, and congress structures will be planned, led and executed by the community people themselves as an expression of their total responsibility for creating the future of their community on behalf of local communities across the globe.
5. LOCAL LEGAL STRUCTURES: Each community shall have established and functioning an appropriate incorporated structure or structures which allow the community to respond to a broad range of socio-economic opportunities both from within and outside the community. These structures must include management systems designed to aid the community's development.
6. STABLE FULL-TIME EMPLOYMENT: Each community shall have developed a variety of vocational alternatives so that choices might be available and so that each family unit shall have an adequate income with a minimum of one member per family employed in a stable full-time job.
7. DIVERSE COMMERCE-INDUSTRY-AGRICULTURE: Diverse commercial development involving local entrepreneurs will provide services to the community while broadening the economic base. Industrial enterprises and agricultural development will utilize local resources and provide a stable economy.
8. ESTABLISHED COMMITTED LEADERSHIP: Established committed community leadership will symbolize the visibility and maturation of the 24 showpieces in June, 1978, globally.
9. GLOBAL PARTICIPATION PLAN: Completion is occurring when local people are regularly involved in awakenment and engagement campaigns beyond the community -- doing Town Meeting set-up and orchestration and participating in initiating consults for new MDP's. Some will have put themselves under global assignment as members of the Order. Others will regularly participate in all the programs of the Global spirit movement.
10. SYMBOLIC CENTER ESTABLISHED: The community's central node would be completed with that symbol which represents the community's identity, i.e. the Iron Man statue on the Fifth City Plaza.
11. CONSTRUCTION COMPLETION SECURED: A completed project must have two comprehensive plans in concert with the MDP document--one, a comprehensive market analysis of all proposed commerce and industry; secondly, a comprehensive development plan for housing, new construction and renovation, expansion development plan for highways; public lighting, sewage, utilities, schools, public transportation, zoning; start up loans and financing must be secured and projected; and, ground breaking ceremonies celebrated.

Advent, 1977

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ARENA Project Completion
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12. SELF-SUFFICIENT FINANCIAL MANAGEMENT: The "completed" community will have within itself the ability to manage its own financial affairs in order to demonstrate economic self sufficiency. In addition, the community will have established a financial base sufficient to support its social programs such that a minimum of 60% of funds for these programs comes from within the community.
13. EXTERNAL RESOURCES CLOUT: Establish clout with external economic and political public and private resources and design the liaison mechanisms to allow for ongoing, effective operations of local programs, e.g. tax and revenue sharing, public services and private expertise.
14. COMPREHENSIVE ONGOING TRAINING: Provide structures for ongoing comprehensive education for all age groups. Such education would include human methods imag. ed., basic education, practical skills, functional literacy, financial education, social, intellectual and spirit methous, as well as contradictional analysis and proposal thinking.