
PLANNING THE FUTURE WITH SHARED VALUES

a workshop with Dr Ronald Forbes, Dylan Forbes and Peter Hoskins

Our Desired Outcome

That we take part in creating a Future with Shared Values

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Your client

- When you are thinking only about your own organisation or even if you are thinking as far as your immediate client, stopping there does not help you or your client. You and they will be missing opportunities and threats, and other realities that exist beyond those boundaries.
- This is the approach of most companies that attempt to focus on what they think will sell, how they can increase market share, or try to keep up with the activities of their competitors
- When your focus is on the needs of society and the environment, you are in touch with the real world, you are at the cutting edge – you are a leader in your field. The solutions you provide will always be relevant and in demand.
- By solving problems that matter for society and the environment you are helping to ensure that you have a healthy culture in which you and your client can thrive, and that you will continue to provide that for which there is a real need. Hence your organisation is sustainable in the long-term – there will always be a client.

IDEAL VISION

People everywhere have something in common. For the last twenty years or so, Roger Kaufman has been asking people on five continents about the future they want. Do you think he has found agreement between such differing countries, races and religions? He has. Is there a point that brings people to agreement? There is, it is the World for Tomorrow's Child.

An Ideal Vision is a measurable statement of the kind of world we want to create together for tomorrow's child. While it may not be achieved in our lifetime, it is any organization's common "guiding star" for thinking, planning, doing, and continuously improving. Our Ideal Vision is as follows...

All people will live in a healthy, positive, safe, and satisfying environment where all things both survive and thrive.

There will be no losses of life or elimination or reduction of levels of well-being, survival, self-sufficiency, quality of life, livelihood, or loss of property from any source.

Poverty will not exist, and every person will earn at least as much as it costs to live (unless they are progressing toward being self-sufficient and self-reliant).

No adult will be under the care, custody, or control of another person, agency, or substance. All adult citizens will be self sufficient and self-reliant as minimally indicated by their consumption being equal to or less than their production.

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In this way, Roger Kaufman has created a minimum Ideal Vision to which all people seem to be able to subscribe. You may add to it if you wish, but there is nothing that you can take away from it and still have global acceptance.

“If your organisation is not contributing to the World for Tomorrow's Child – then what it is doing?” - we call this Kaufman's question.

PLANNING

Roger Kaufman's Mega Planning is a 3-level method of planning that begins with the Ideal Vision. It uses a structured, aligning process in which the Ideal Vision becomes the keystone of an organisation plan that will be effective and profitable long into the future.

- The Mega level focuses on the external clients and stakeholders
- Macro focuses on the organisation and its success
- Micro focuses on the contributions of those within the organisation.
- *All levels contribute to one another and are equally important.*

Prof. Emeritus Roger Kaufman was one of the Founding Members of the ISPI. So, as you would expect, Mega Planning uses a concrete, evidence-based methodology to let you know the results you have achieved, and be able to prove it.

First of all, of course, **decide where you are going before you begin**. Assess the Needs – defined as gaps in results at each of the three levels and create the corresponding objectives... Ask the question: “If my organisation is the solution, what’s the problem?”

As you begin to implement plans, measure results and adjust as necessary.

THE THREE LEVELS OF PLANNING

The **Mega Level** is made up of the specific objectives (*ends*) that your organisation commits to contribute to the Ideal Vision, while embracing (and not subtracting from) the total Vision.

Mega is focused on the external clients and stakeholders – including society & the environment. Roger calls this the Second Bottom Line.

What are some of the ways in which your organisations could contribute?

What would you measure?

Let us contrast this with the current concept of being ‘a good corporate citizen’.

1. In Mega Planning, we don't just have some activities or donations that are beneficial to society or environment (and can dry up when the quarterly balance sheet goes into the red). Instead our entire activity from the very beginning is directed continuously towards the Ideal Vision, regardless of external factors.
2. We don't assume value contributed but *measure* the impact of our activities and can prove the value we add to society and the environment.
3. Although we can always learn from other organisations, we don't benchmark on them, we benchmark on the Ideal Vision – a distant star that we can never reach but whose light always directs us.

Planning with Shared Values

When a company operates from a strong values based position, it is offering more to its clients than they might have expected, it goes beyond fulfilling expectations. It gains loyal and appreciative customers. The same goes for staff. They feel pride in the organisation they are part of and the future they are working to create.

It also becomes feasible to plan in partnership with your clients.

Recent examples of companies that have concentrated on the single bottom line and fallen by the wayside - the list of giants is long and includes: HIH, WorldCom, Enron, Andersen Consulting...

Some companies that prosper through perceiving that they have a broader client are The Body Shop, Kyocera, Hewlett Packard (200-year planning), Grameen Bank, and envirotec, organic food, ethical investment and similar organisations...

Many organisations have taken up to some degree the challenge of Mega Planning. A few of Roger Kaufman's many clients are: Los Alamos Laboratories, Chase Manhattan Bank, US Coast Guard, IBM, Florida Dept of Corrections and Dept of Environmental Protection - even World Bank. Also the **Australian** Depts of Defence and Treasury, and the **New Zealand** Depts of Minister & Cabinet; Treasury; Army; State Services; Health; and Science and Technology.

Woods Bagot WB+ Division, managed by Peter Hoskins, is clearly on the road.

Macro

At the **Macro Level** we list objectives (*ends*) necessary for the organisation to be successful (profitability, market share, competitiveness...) – within the Mega level objectives. Here, the organisation is the primary client

NOTE that by fulfilling Macro objectives within the Mega level, your organisation will be less like to incur lawsuits for accidents, pollution, malpractice, etc.

Note down some objectives (with measures) for your organisation's success

Micro

The Micro Level lists objectives (*ends*) of groups and individuals necessary for the organisation to achieve its objectives at the Macro and Mega levels. Macro objectives are the Building Blocks that create success for the organisation. When they contribute beyond the Micro level and add value to the organisation's clients and stakeholders, then they are High Payoff results.

NOTE that by fulfilling Micro objectives within Micro and Mega, your organisation also avoids 'empire building' of managers, and internal conflict over the distribution of money and resources.

Note down some Micro Level objectives (with measures)

Process

Process is what groups and individuals *do* with the resources (*means*) to achieve the objectives at all levels. Activities, procedures, programs.

NOTE that Processes will be designed to meet or to be in accordance with the agreed objectives at all levels.

Note some of the processes you use:

Inputs

Inputs are the raw materials - human, physical & financial resources. This is what groups and individuals require (*means*) to operate and achieve the objectives at all levels.

NOTE that resources will be prioritised and shared according to the agreed objectives at all levels.

Note some of the inputs you use:

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* Articles available from:

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Other articles on Mega Planning are available from:

<http://www.megaplanning.com/>

The Alexander River case study is to be found at on the ABC's Radio National website at:

<http://www.abc.net.au/rn/science/earth/stories/s937113.htm>