

Introduction

The purpose of the handbook is to provide Creative Initiatives Associates and prospective Creative Initiatives workshop facilitators with an overview of the Creative Initiatives Process, workshop parameters and guidelines, and procedures for obtaining workshop grants for qualifying non-profit and non-governmental organisations.

The Creative Initiatives Foundation

The Creative Initiatives Foundation (Creative Initiatives) was the inspiration of Po Chung, the founder of DHL International. It was established by a broad cross-section of the Hong Kong business community. Our leaders and Associates represent the strength and innovation for which Hong Kong is known and respected worldwide.

Creative Initiatives sprang from the uncertainties and challenges of postcolonial Hong Kong and the unfamiliar surroundings of a recession-bound Asia in 1997. Since its inception, Creative Initiatives has helped more than fifty non-profit, governmental, charity, and community organisations achieve higher levels of efficiency, effectiveness, and innovation.

Our Vision

Creative Initiatives envisions a world in which individuals and groups use their creative initiative to solve significant social problems and improve the ways in which they live, work and play.

Our Mission

Creative Initiatives exists to promote the creative initiative of individuals and groups and to encourage the use of socially responsible business practices to help meet community needs.

Every day, we help to create this world by supporting three integrated strategic initiatives:

1. Creative Initiatives Workshops
2. Creative Initiatives for Youth
3. Creative Initiatives Resource Centres

These three initiatives aim to create enthusiastic, self-sufficient and self-fulfilled citizens who are able to realize creatively and confidently notable improvements in the ways they live, work and play; and further, to create cooperative groups of citizens that use group creativity and socially responsible business practices to improve the efficiency and increase the effectiveness of non-profit organisations, governmental agencies and groups with a shared interest.

Information about our resource centre for Creativity and Innovation and our Creative Initiatives Programs for Youth can be found on our website at: www.creative-initiatives.org.

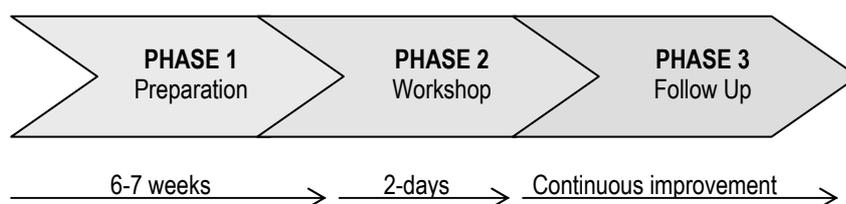
Our Workshops

A Creative Initiatives Workshop serves as a catalyst to spur original ideas and flexible thinking, instil confidence among individuals, and revitalize an organisation for positive and innovative strategic thinking. Participating in a workshop enables a group or organisation to:

- clarify its aspirations;
- formulate consensus regarding its current state and future direction;
- build consensus regarding the issues and problems that are affecting its efficiency and effectiveness and rank them by importance;
- generate creative initiatives to close the gaps between where the organisation is and where it wants to be; and,
- generate enthusiasm and commitment to carry out and implement the best and most practical initiatives in light of competing needs and resources.

Creative Initiatives Workshops for NGO's and NPO's

There are three phases to a Creative Initiatives Workshop for a non-government or non-profit organisation.



While the workshop requires only two days of stakeholder commitment, it usually takes the Associate/workshop facilitator 6-7 weeks to prepare for the workshop and another 4 weeks to complete a digest. The digest documents the workshop inputs and outputs and lists the next steps the organisation must take before it will fully benefit from participating in the workshop.

Workshop grants do not provide funding for the Associate/facilitator to help an organisation carry out the follow up tasks. However, the foundation encourages Associates or business consultants who use the Creative Initiatives workshop-centred process to help the organisation plan to carry out the workshop outputs.

Getting Started

There are two ways to start the Creative Initiatives grant process:

1. A Creative Initiatives Associate who already has a professional relationship with a non-profit organisation can sponsor an organisation and help it complete and submit a grant application (Appendix 1).
2. The executive director, board president, or a key stakeholder of a non-profit organisation can contact Creative Initiatives about an issue or problem the organisation is having difficulty dealing with. In this case, the Creative Initiatives grant coordinator or staff member will help the organisation with the application form. If the application is approved, an Associate will be appointed to help the organisation complete the application process.

If an organisation qualifies for a workshop grant, then four of the organisation's major stakeholders will be asked to complete a workshop questionnaire (Appendix 2).

The foundation's decision to award a workshop grant is based on the application, the application questionnaires, and discussions with the Associate and the organisation's leadership.

Workshop Grants

Creative Initiatives Associates are paid up to HK\$150,000.00 to facilitate a Creative Initiatives Workshop for a qualifying NPO or NGO.

While a workshop grant is only intended to cover preparation and facilitation costs, there is no prohibition against an Associate using a portion of the grant proceeds to help the organisation to follow through on the workshop outputs and next steps.

To be eligible for a grant, the organisation must meet the foundation's qualifying criteria and use the Creative Initiatives Process as part of a comprehensive strategic review, strategic planning process, overall self-assessment, or quality review.

Qualifying Criteria

To qualify for a workshop grant, an organisation must be able to demonstrate the following characteristics:

1. At least one member of the organisation, in a position of power, is committed change.
2. The organisation is willing to involve representatives from all levels of the organisation as well as external stakeholders in the Creative Initiatives workshop-centred process.
3. The organisation is willing to establish management structures and behaviours that will help improve the organisation's effectiveness and efficiency.
4. The organisation's stakeholders are willing to work cooperatively to creatively address change and improve the efficacy of the organisation.
5. A critical mass of policy makers are willing to participate in the two day workshop.

Additional qualifying criteria may be imposed.

Associate Grant-seeking Procedures

CIF Associates are required to adhere to the following grant application procedures:

1. Before contacting a NGO for the purpose of encouraging the organisation to apply for a Creative Initiatives workshop grant, the Associate should contact CIF to see whether another Associate might already be working with the organisation.
2. CIF will grant an Associate exclusive permission to contact as many as six organisations at any one time. Exclusive permission shall only be granted for 90 days after which the Associate must reapply for an extension.
3. Grant applications and application questionnaires are available on Creative Initiatives' website: www.creative-initiatives.org
4. Associates are encouraged to help the applying organisation complete the grant application form and questionnaires.
5. Completed applications and questionnaires are to be faxed (2511-1698) or mailed to Creative Initiatives Foundation, 701 HKAC, 2 Harbour Road, Wanchai, Hong Kong SAR.

6. Associates should contact Tom Osgood if they have any questions about whether an organisation might qualify for a workshop grant.

Email: tosgood@creative-initiatives.org

Hong Kong:

Cell phone 9028-1816
Office: 2179-2727 Direct line: 2179-2772
Fax: 2511-1698

California:

Cell phone: 1-530-209-1724
Home/office: 1-530-241-5303
Fax: 1-530-241-2612

7. After a grant is approved, CIF must receive signed copies of the Letter(s) of Mutual Understanding (see Appendix 3) before any grant funds will be dispersed.

Funding

Grants are paid directly to the CIF Associate.

1. Thirty percent of the grant is payable upon Creative Initiatives approving the Workshop Handbook (See page 23).
2. Thirty percent of the grant is payable upon Creative Initiatives receiving a copy of the Workshop PowerPoint Presentation (See pages 23-24).
3. Forty percent of the grant is payable upon Creative Initiatives receiving a hard and a soft copy of the Workshop Digest (See page 36 and Appendices 15-16).

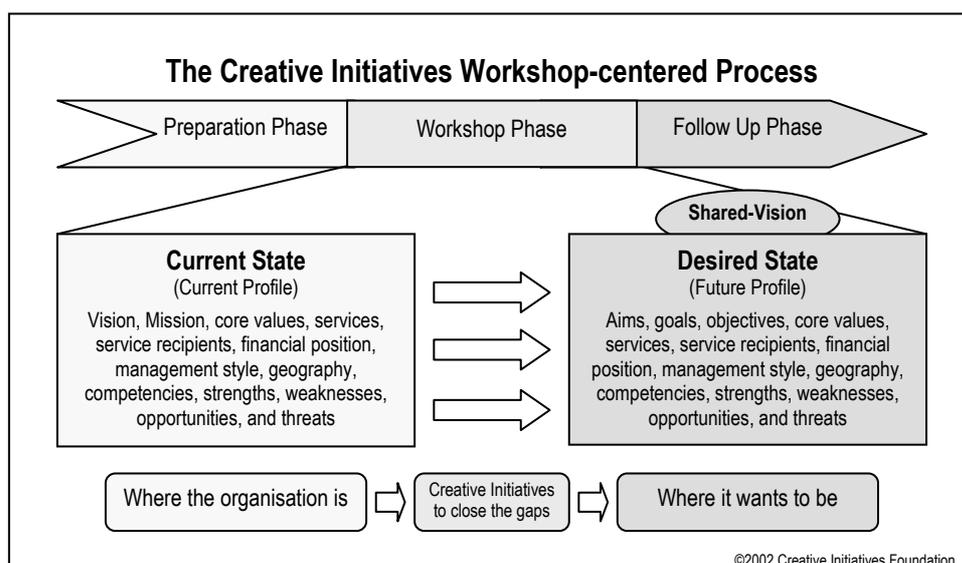
The Associate must send a separate invoice for each payment.

The Letter of Mutual Understanding

Prior to the actual awarding of a grant CIF, the organisation and the Associate must sign a Letter of Mutual Understanding that outlines each party's responsibilities (Appendix 3).

The Creative Initiatives Process

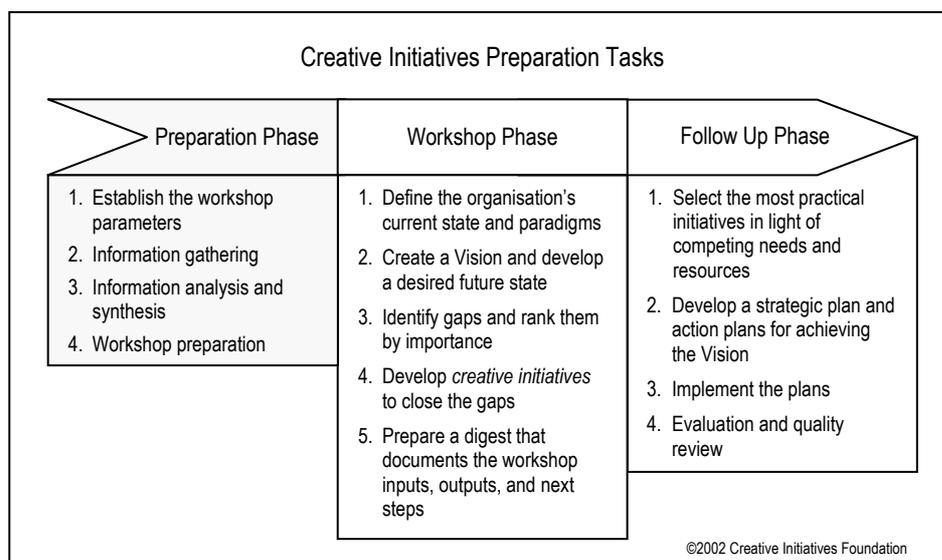
The Creative Initiatives workshop-centered process is a strategic thinking and planning process that helps individuals and groups measure current conditions, develop a shared vision of the future, and describe the characteristics the person or group must possess in order to bring the vision to reality. When carefully applied, the Creative Initiatives Process provides a road map for how the organisation can get from where it is to where it wants to be.



The workshop is preceded by 6-7 weeks of preparation and followed up by a period in which the organisation follows up on the next steps and recommendations contained in a Digest that documents the workshop inputs and outputs.

Workshop Preparation Phase

Preparing for a successful Creative Initiatives Workshop requires a great deal of cooperation between the Associate and the organisation's leadership and stakeholders. The Associate must have their enthusiastic support in order to complete four preparation tasks within the agreed upon timeframe.



Task 1: Establishing the Workshop Parameters

The application and initial contact usually provide enough information to establish the workshop parameters. However, during the first official meeting with the executive director and/or board chair, the Associate verifies the parameters and begins to collect more information about the issues and problems facing the organisation.

Task 2: Information Gathering

The Associate conducts confidential interviews (Appendix 4) with 6-8 key leaders and decision-makers to collect their opinions about the organisation's current state, possible future directions, and the issues and problems that are impacting the organisation's ability to carry out its mission. The Associate is required to conduct interviews with the executive director, board president, one or more of the most influential board members, one or more managers and a few additional stakeholders.

It is very helpful to the Associate if the organisation's representative can schedule the interviews to take place one after the other at a single location. Each interview takes 40-50 minutes. In addition to asking the recommended questions in the Appendix 4, the Associate may wish to dig deeper into some issues and ask the interviewees to support their opinions about how the organisation should go about dealing with a particular issue or problem.

All of the interviewees' important comments are recorded verbatim. Some will be incorporated into the PowerPoint presentation the facilitator will use during the workshop. While the name of the person who made a comment is never revealed, using the participants' own words in the presentation helps to assure them that their opinions have been heard and that they are valued.

The Associate uses the interview data to develop a 15-20 question survey (Appendix 5) that is completed by all of the workshop participants. Closed questions on the survey are used to quantify workshop participants' opinions about the vision, mission, and issues. Open-ended questions are used to collect the participants' personal opinions and ideas about how the organisation might address and solve the key issues and problems. Appendix 6 contains some example survey questions that can be adapted to meet the needs of most NPO and NGO organisations. The survey may need to be circulated to a larger group of stakeholders if the

organisation's leaders and policymakers exhibit a lot of disagreement about the current situation and way forward.

It's the Associate's responsibility to gather enough information to be able to adequately illustrate the organisation's current profile and potential future directions. This includes information about its strengths, weaknesses, opportunities and threats, and opinions about how the organisation should deal with changes in its political, economic, social, and technological environments.

It's the organisation's responsibility to circulate and collect the surveys for the Associate.

Task 3: Information Analysis & Synthesis

The Associate uses the interview responses and survey data to determine how much stakeholders own and share the organisation's stated vision and mission and whether the workshop participants need to revisit the organisation's aspirations before developing the organisation's future profile.

Information and stakeholders' opinions about the organisation's strengths, weaknesses, opportunities and threats is analysed, synthesized and recorded on PowerPoint slides.

Information about changes in the organisation's political, economic, social, and technological environments is also analysed, synthesized and recorded on PowerPoint slides.

Task 4: Workshop Preparation

The Associate organises and sequences the PowerPoint slides according to the Creative Initiatives Workshop example agenda (Appendix 6). This sequences the information into a PowerPoint slide show that s/he will use to guide the participants through the workshop phase of the Creative Initiatives Process.

CIF encourages Associates to follow the sample agenda sequence as closely as possible.

Workshop Handbook & Executive Director Review

The Associate prints the PowerPoint slides and assembles them into a draft Workshop Workbook, which s/he reviews with the organisation's executive director. The ED may suggest changes of various sorts. Mistakes in the current profile are corrected or clarified. Changes regarding the flow and format of the presentation are generally accepted and accommodated. Objectionable

stakeholder opinion statements are not edited or removed from the presentation without the permission of the person who made the comment.

Workbook Distribution

At least one week prior to the workshop, a final version of the workshop workbook is delivered to the ED of the organisation. It is the responsibility of the organisation to print copies of the workbook and distribute them to the workshop participants at least four days before the workshop. This provides sufficient time for the participants to browse through the materials, which helps them focus on the major issues and align their expectations for the workshop.

The Associate can send an invoice for thirty percent of the grant along with the workbook to the grant coordinator. CIF will pay the invoice in due course.

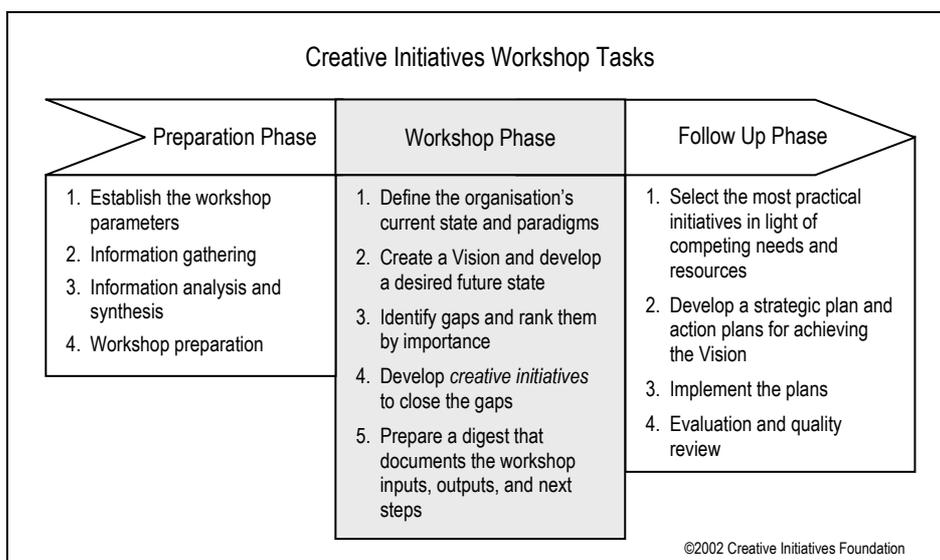
The Workshop

A Creative Initiatives Workshop for an NPO or NGO is two days in length and is usually conducted on a Friday and Saturday. An off-site location is preferred and the dress is casual. The room should be set up horseshoe style with a screen for computer-assisted presentation, a video player, and 2-3 flip charts in front (Appendix 7). In addition to the room in which the workshop will take place, at least four other smaller rooms are needed for the breakout sessions.

At least two days prior to the workshop, the Associate should contact the organisation to make sure everything has been taken care of (Appendix 8) and to verify that the stakeholders who were listed as participants on the application are indeed planning to attend. The organisation is responsible for making sure the attendees who were identified on the application do show up and participate. The organisation is responsible for replacing any stakeholder who cannot attend the workshop with another participant of equal decision-making power. The Associate can cancel the workshop if he or she thinks participation has fallen to a point where conducting the workshop would not benefit the organisation.

Workshop Tasks

The Associate helps the participants to complete four tasks during the workshop.



Task 1: Define the Organisation's Current State

Any change process begins with knowing where you are and why you want to leave. According to Noel Tichy and Eli Cohen, authors of *The Leadership Engine*,

“change occurs when: $D + V + C > I$.”

In the above formula,

D = Dissatisfaction

V = Vision

C = Concrete first steps

I = Inertia

Defining an organisation's current state involves clearly defining both ends of this equation. Dissatisfaction (**D**) represents all of the issues and problems that must be identified before they can be addressed or solved. Inertia (**I**) represents the current situation, including ways of thinking and operational paradigms that may be impacting the organisation's efficiency and effectiveness.

During the workshop preparation phase, the Associate used the information s/he collected to construct a series of PowerPoint slides that in his or her opinion describe the organisation's current profile (Appendix 9) and identify the issues and problems that seem to be keeping people awake at night. At the workshop, the Associate uses the slides to stimulate a guided discussion that leads the group to consensus about the current situation, issues, and problems.

Developing the correct list of characteristics or attributes to describe the current profile may be critical to the success of the workshop since the same set of attributes will be used to describe the desired future profile. When the same attributes are used to describe both the current and future profiles, it becomes much easier for the participants to see the differences between the current situation and the one everyone hopes to attain.

CIF Associates typically use the following list of terms to help classify the characteristics and attributes that describe the current profile: vision, mission, core values, geographical area, services provided, service recipients, financial position, management style, geographical area, competencies, skills, strengths, weaknesses, opportunities, and threats.

It's critically important for everyone to participate actively during the workshop and to know that their ideas and opinions have been heard and that their ideas will be considered during the final decision-making process.

Task 2: Create the Vision and Develop a Future State

Unlike profit making companies that easily measure success in terms of dollars, non-profit organisations measure their successes in terms of positive changes in people's lives, changes in government policy, and new levels of community cooperation. This is very difficult to do since it is almost impossible to measure with certainty the amount of positive change that is the result of a single organisation, program, or policy. Still, we must try.

Research sponsored by Venture Philanthropy Partners demonstrates that:

Nonprofits need to spend time and effort evaluating and articulating their aspirations [vision, mission, and goals]. Aspirations inspire staff, volunteers, and donors. They define what an organisation will do – and won't do. They help define an organisation's overall approach and set priorities for action. They are a basis for strategy, which in turn defines the proper design of human resources, systems, and organisational structure. In short, aspirations drive everything. According to our findings, the organisations that made the greatest gains in social impact were those which tackled high-level questions of mission, vision, and goals (Effective Capacity Building in Nonprofit Organisations, McKinzie & Company, 2001).

So, if a Creative Initiatives Workshop succeeds in providing an organisation with the opportunity to verify that its aspirations are still relevant in the face of changes in its political, economic, social, and technological environments, and it serves to motivate the leadership to check whether existing programs are supportive of the vision, mission, and goals, then the workshop will have been a success.

Creating a shared vision

Creative Initiatives encourages organisations to develop *externally focused* visions that can be measured in concrete terms but that are still a stretch in terms of their attainability under the organisation's current paradigms. In this sense, a good vision is one that helps stakeholders visualize an answer to the impossibility question,

"What is impossible to do today, but which, if it could be done, would fundamentally change your organisation for the good?" - Joel Barker -

It is important for the focus of the vision to be external. After all, non-profit and nongovernmental organisations exist to provide a service to people in need or to bring about a desired change in the community. By focusing the vision outside of the organisation and upon a desired change or benefit to the community, it is much easier to agree on a vision that everyone can share and get enthusiastically behind.

When the focus of the vision is internal, i.e., growing the number of service recipients or programs, having a larger office, the most service centres, raising the most money, or having the highest paid staff, it is difficult to get stakeholders to share the vision because each is too concerned about their own piece of the pie.

CIF Associates use a variety of techniques and activities to help an organisation formulate a shared vision.

One of the most successful activities to date is to ask several 5-7 member teams of workshop participants to imagine a future scenario and then complete a series of tasks (Appendix 10).

Sample Visioning Activity

Imagine it is 2007. Your organisation has just received a prestigious award for being the most successful NGO in its area of service and the South China Morning Post has announced the event in a feature story on its front page.

Task 1: Write a headline for the story.

Task 2: Write a short opening paragraph that describes who, what, when, where, and why your organisation was recognized in such a celebrated manor.

Task 3: Develop a list of supporting details.

The teams are given 30-45 minutes to complete the assignment after which each team gives a report to the whole group. The result should be a collection of fuzzy visions for the organisation. Fuzzy because they haven't been written as vision statements, but visionary nonetheless because they describe a future in which the

problem or need the organisation aims to address has been effectively dealt with or possibly even eliminated. It is important that the teams focus on the accomplishments of the whole organisation and not just those of a department or program.

Following the presentations, the facilitator helps the whole group find the common threads and develop several potential visions for the organisation. These are compared to the organisation's stated vision to determine whether the current vision needs to be revisited and rewritten. No more than 40 minutes is spent in the discussion. If more time is needed, the facilitator recommends board members revisit the vision during a future board meeting. This recommendation is then included in the next steps that will be listed in the workshop digest.

The activity should be adapted to create interest and really motivate the group. One way of doing this is to use a real award or to substitute an award and publication that is highly valued by the participants.

Once the vision is shared and agreed upon, or the participants at least know what success for the organisation will look like, they are better able to imagine and define the characteristics the organisation must possess in order to bring about the desired change in the community.

The same attributes that are used to describe the current state/profile are used to describe a future desired state/profile for the organisation. This enables the workshop participants to literally see the differences between where the organisation is and where it wants to be.

Prior to the workshop, the Associate used stakeholder opinions to develop some possible future orientations that are illustrated on PowerPoint slides (Appendix 11). During the workshop, the facilitator uses the slides to guide the discussion and build consensus regarding the characteristics the participants think the organisation must have in order to bring the vision to reality.

Generally, only a few of the characteristics or attributes will be the focus of most of the information collected prior to the workshop. This is because the most significant issues or problems were discovered during the interviews and then became the focus of

the questionnaire and survey. Even so, it is important to list every attribute and check to determine whether improvement is needed.

This serves three purposes.

First, it provides an opportunity for the facilitator to point out a systems point of view that brings to light how many of the characteristics and attributes interact and why each one may need to be considered when deciding how to deal with the really big issues.

Second, it gives the facilitator an opportunity to measure how much consensus there is regarding the attributes that were not thoroughly investigated prior to the workshop. The amount of consensus on each attribute should be included in the workshop digest.

Third, it gives the facilitator an opportunity to point out where the organisation is doing well and where little or no improvement is needed. This gives the participants a sense of accomplishment and puts them in a positive frame of mind for addressing what needs to be achieved.

Task 3: Identify Gaps and Rank Them by Importance

Prior to the workshop, the facilitator should prepare some flip charts that can be used to illustrate the differences between the current and future profiles. During the workshop, the flip charts are completed and placed side-by-side to help the participants see the differences between where the organisation is and where it wants to be.

When there is enough information available before the workshop to draft possible future orientations, the facilitator may want to put the information on a PowerPoint slide (Appendix 12) or a worksheet (Appendix 13) that can be included in the Workshop Workbook.

Most organisations and workshop participants go into a workshop thinking that money is the solution to all of the problems, and that getting more money is the most critical gap. More money may help buy more food and medicine, but hunger and sickness are only symptoms. It takes more than money to tackle the causes of hunger and disease.

It is the same with non-profit organisations. More money may temporarily reduce the dissatisfaction but more money will not

alleviate ineffectiveness, inefficiency or public relations problems that may be preventing the organisation from attracting additional sources of revenue. In fact, it could be argued that eliminating organisational dissatisfaction about funding can end up being counterproductive. After all, according to the change formula, dissatisfaction is one of the things that drive change and helps create a better future.

Even if an organisation receives more money, it will never be enough money to meet all of the needs of the organisation and its service recipients. Someone must still decide which programs to spend more money on and which ones need to wait until next time. It is the same with prioritising the gaps. Assuming a critical mass of stakeholders is committed to changing the current paradigms, it is important to decide where a little change will bring about the most success. That is probably the gap that needs to be closed first. Once that gap is closed, it will be easier and less painful to close the next one.

Usually, there is a close correlation between the most critical gaps and the issues and problems that are keeping most of the people awake at night. Once the problems are illustrated as gaps between where the organisation is and where it wants to be, it becomes a lot easier to identify what the root problems are, which problems need to be addressed first, and which ones can wait until another day.

Tichy's change formula distinguishes "concrete first steps" as opposed to trying to accomplish "everything at once". In order to create an organisation that embraces change and aspires to be culturally creative and innovative, it is important that the first attempt at change leads to success. For this reason, the Associate guides the participants toward choosing to close a critical gap first, but one that can be closed with a series of safe, small steps.

It is not uncommon for a director or manager who has been around for a long period of time to have a pet project that is not shared by many other stakeholders - one that is not as important as it used to be or one that no longer meets the needs of the community. It is also not uncommon for a generous or long time donor to have heavily influenced past decisions, the allocation of resources, or the development of programs that are no longer relevant but which may still be valued by a few historical power brokers. These and other influences can make it difficult for the workshop participants to rank the gaps objectively and decide which ones need to be addressed first if this is attempted by the whole group.

When there is a shared vision and people seem to be moving in the same direction, prioritising the gaps can be as simple as raising hands or casting private ballots. When the Associate feels that a few strong voices are influencing the decisions of the timid, or that some participants' timidity would prohibit them from assertively voicing their opinions, then the Associate/facilitator should assign small teams the job of prioritising the gaps. If teams are used, they should be heterogeneous as to departmental or program interest and the facilitator should consider putting all of the strongest voices on the same team. The latter strategy will enable more people on the other teams to have their voices heard.

The Associate usually identifies potential problems during the preparation phase and collects enough stakeholder comments about issues, problems and potential future orientations to be able to quantify stakeholder opinion. When this information is quantified and presented on PowerPoint slides, this is often all it takes for a reasonable person to understand that his or her opinion is not widely held by the group.

The Associate will probably identify the two or three of the most important gaps during the preparation phase. This information needs to be verified during the workshop and consensus reached as to which of the two or three is most critical to moving the organisation to higher levels of success. In addition, the facilitator must get consensus on which gaps can wait until later. If consensus is not voiced and documented at the workshop regarding what is not consensually important, then it is very likely that someone will try to regain lost ground after the workshop.

Task 4: Develop creative initiatives to close the gaps

During a Creative Initiatives Workshop, one of the facilitator's key jobs is to create as many opportunities as possible for the participants to experience the productivity and thrill of group creativity. This is accomplished through large group and small team brainstorming sessions where participants are encouraged to freely suggest solutions to the seemingly impossible questions.

For example: When trying to generate ways to close a gap between service delivery today and the desired level and quality of service delivery in the future, teams might be asked to generate a multitude of creative initiatives that are *impossible to do today, but which, if they could be done, would fundamentally change service delivery for the good.*

During these sessions, the facilitator coaches team members to mutually enforce the following brainstorming rules, which should be included in the workshop handbook and posted in the rooms used for the brainstorming sessions.

Rules for Brainstorming:

1. **Defer judgment.** Go with the ideas that come to mind. Don't evaluate ideas while they're being generated. There's plenty of time to evaluate the ideas later.
2. **Strive for quantity.** The more ideas you have the better the odds that you'll have a really good idea. Set a number of ideas to strive for, say 30 or 35.
3. **Seek wild and unusual ideas.** Don't restrict yourself by what you think others might think.
4. **Build on other ideas.** Improve and combine ideas. Stretch your imagination.

The goal is to generate as many creative ideas as possible. All ideas are considered good ideas. The result should be an exhaustive list of creative solutions and innovative strategies that might fill the gaps and move the organisation ever closer to the desired future state. All of these ideas are potential "creative initiatives," actions that might answer the impossibility question and result in new paradigms and higher levels of success for the organisation.

The best or most practical ideas don't need to be selected at the workshop. In fact, many executive directors and board chairs may wish to prohibit the workshop participants from actually making any final decisions at the workshop. This is okay, as long as the restriction was disclosed on the grant application and the workshop participants knew this going into the workshop. It is the responsibility of the executive director and the board chair to make this information known to the Associate and the responsibility of the Associate to communicate any restrictions to the participants prior to the workshop. This is usually accomplished by mentioning the restrictions in the 'workshop expectations' section of the Workshop Workbook.

Each brainstorming team should have an opportunity to present its ideas to the whole group which may ask for clarification or offer suggestions for improvement. All of the ideas, clarifications and suggestions are recorded and included in the digest.

For many of the participants, this may be the most rewarding part of the workshop. This is especially true when the organisation has a top-down administrative structure or an authoritative management style. Brainstorming new ideas, discussing them on their merits rather than their source, and taking personalities and emotions out of the decision process is very rewarding for people who have never had this experience before.

What is important is for everyone to be heard and to know that their opinions are valued. For this reason, it's critical that the Associate carefully monitor the amount of time each person is allowed to speak and prohibit any one person, especially the executive director or board chair, from dominating the discussion. The workshop is owned by all of the participants and it should never become a forum for management to criticize staff, or staff to criticize management. It is the Associate/facilitator's job to keep the discussion focused on the issues and ideas.

Before adjourning the workshop

At the end of the workshop, the Associate/facilitator reviews the workshop outputs with the participants and seeks to develop a list of "next steps" that policy-makers, administrators and managers must take before the organisation will fully benefit from participating in the workshop. These are documented and will be included in the workshop digest.

The organisation is responsible for distributing and collecting a workshop evaluation form (Appendix 14) from every participant. The evaluations must be completed and collected at the workshop. Immediately following the workshop, the forms are to be placed in an envelope and mailed to the CIF grant coordinator.

Task 5: Prepare a Digest that Documents the Workshop Inputs, Outputs and Next Steps

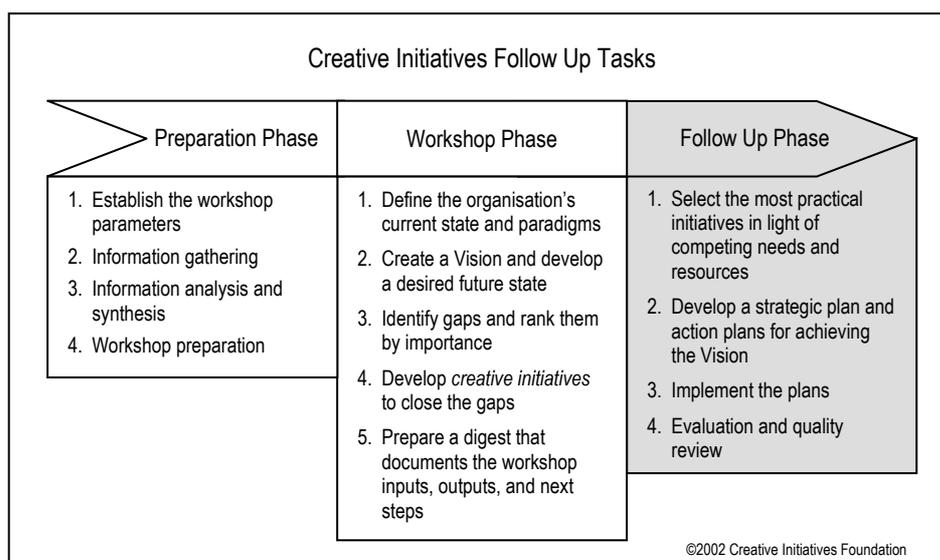
Following the workshop, the facilitator assembles the workshop inputs, outputs and list of next steps into a digest that s/he delivers to the organisation's executive director within 30 days.

The Digest should include each of the items listed in Appendix 15 and follow the Digest Template (Appendix 16).

Follow Up Phase

After reviewing the Workshop Digest, the board or executive director determines how the organisation should go about completing four follow up tasks.

The Creative Initiatives Foundation encourages Associates to offer whatever assistance they can to help the organisation plan and perform the Follow Up tasks that are listed on the following chart.



Task 1: Select the Most Practical Initiatives in Light of Competing Needs and Resources

This is a generative process rather than a judgmental one. All of the initiatives should be considered good ideas that are worthy of more study since the implementation of a crazy idea may only be restricted by the existing paradigms and not by what is actually possible.

Columbus's idea to sail around the world was a crazy idea when it was first proposed. However, given time and the opportunity to develop evidence that the earth was a sphere enabled Columbus to find a sponsor, a ship and a crew -- and to discover the New World.

A non-profit organisation should use the following criteria when evaluating the merits of each creative initiative:

1. To what degree will this initiative close a gap between current results and desired results?
2. How much will it cost to implement in terms of dollars, work, and social capital?
3. What is the risk of not choosing this initiative to close the gap?
4. To what degree will the organisation's stakeholders embrace this idea?

If it's a good idea that stakeholders may not embrace enthusiastically, then answering the last question may require a team to develop creative initiatives that will help close the gaps between stakeholder fear and stakeholder buy in.

The selection process is an imaginative one in the sense that selecting the best initiatives requires conceptualising the likely responses to imaginary action plans aimed at implementing each creative initiative.

Task 2: Develop a Strategic Plan and Action Plans for Achieving the Vision

A strategic planning expert or change manager should help develop and write the action plans after carefully considering the digest data and workshop outputs. The digest will list and describe several areas for action planning that the Associate thinks the organisation should concentrate on.

There are several good books that can be useful to organisations

that are involved in strategic planning and action plan development. A few of the best are:

Bryson, John, and Alston, Farnum K.. *Creating and Implementing Your Strategic Plan: A Workbook for Public and Nonprofit Organisations*, Jossey-Bass, 1995.

Allison, Michael, and Kaye, Jude. *Strategic Planning for Nonprofit Organisations: A Practical Guide and Workbook*, 1997.

Tasks 3 & 4: Implement the Action Plans, Evaluate Success, and Improve Quality.

To make certain each action plan is resulting in new paradigms that close the gap it was intended to close, learning organisations continually evaluate how well they're doing. Formative evaluation requires managers to stay in close contact with the stakeholders that are responsible for carrying out each action plan and the stakeholders whose needs the action plan is intended to address.

Continual change in conditions and needs will result in today's new paradigms becoming yesterday's old paradigms. Before this situation becomes obvious to stakeholders, the organisation should repeat the Creative Initiatives Process.