

Making Definite Plans

by Tom Gilb

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Ethics in Business - CSS World Youth Forum



12:00 PM, Thursday November 18th, 2010

20 mins talk + 10 minutes questions

Hotel Mercure, Louvain-la-Neuve, Belgium

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MAKING DEFINITE PLANS

(Summary of talk)

- The wonderful energy of our youth needs to be channeled in the right direction, otherwise it can be wasted – and worse – the great results they might produce, will not happen, or will happen too late.
- This advice applies to all ‘ages’.
 - But youth might well have to teach it to their older colleagues.
- People tend to have unclear objectives, at the ‘wrong level’ of thinking
 - (the means, not their true ends).
- We do not recommend too much detailed planning
 - do only a page or so, before action is taken to move towards your ‘right’ objectives.
- We do not recommend that your project teams are constrained unnecessarily
 - in choice of the strategies to meet your objectives.
- We do believe that our world is complex, and full of surprises –
 - ² so we must rapidly learn what works, and adapt everything to the best way to reach our goals.

Main Ideas

1. You need to be aware of your many project stakeholders and the stakeholder values

2. You need to clarify your critical few objectives, so nobody can misunderstand; and so your team can really agree to the same vision.

This is the definite plan that you will use to select good strategies to accomplish your goals.

You should believe and know that even qualities and human values can be specified numerically and clearly. They are too precious to specify vaguely!

4. You need to rapidly and frequently – week by week – dive into action to deliver some value to some stakeholders

5. You need to rapidly learn what is realistic, and change what is not

To teachers, from Sri Sri Ravi Shankar

June 6 2003



■ *“We know you know the goals”*

“But you might not be setting
– *a definite goal and*
– *a definite time”*

- (In other words, it is not enough to know the goal name, spirit and direction: we must be **specific, concrete and numeric about it in everyday application.**)
- <- TG interpretation after discussion with Guruji.

Hints for Mankind

- *“Never live in the past,
• but never fail to learn from it.*
- *Never live in the future,
• but never fail to plan for it.”*
- *From The AOL Foundation presents Health - Hygiene - Harmony. 880107, Bangalore*
- *Blissf@giasbg01.vsnl.net.in*



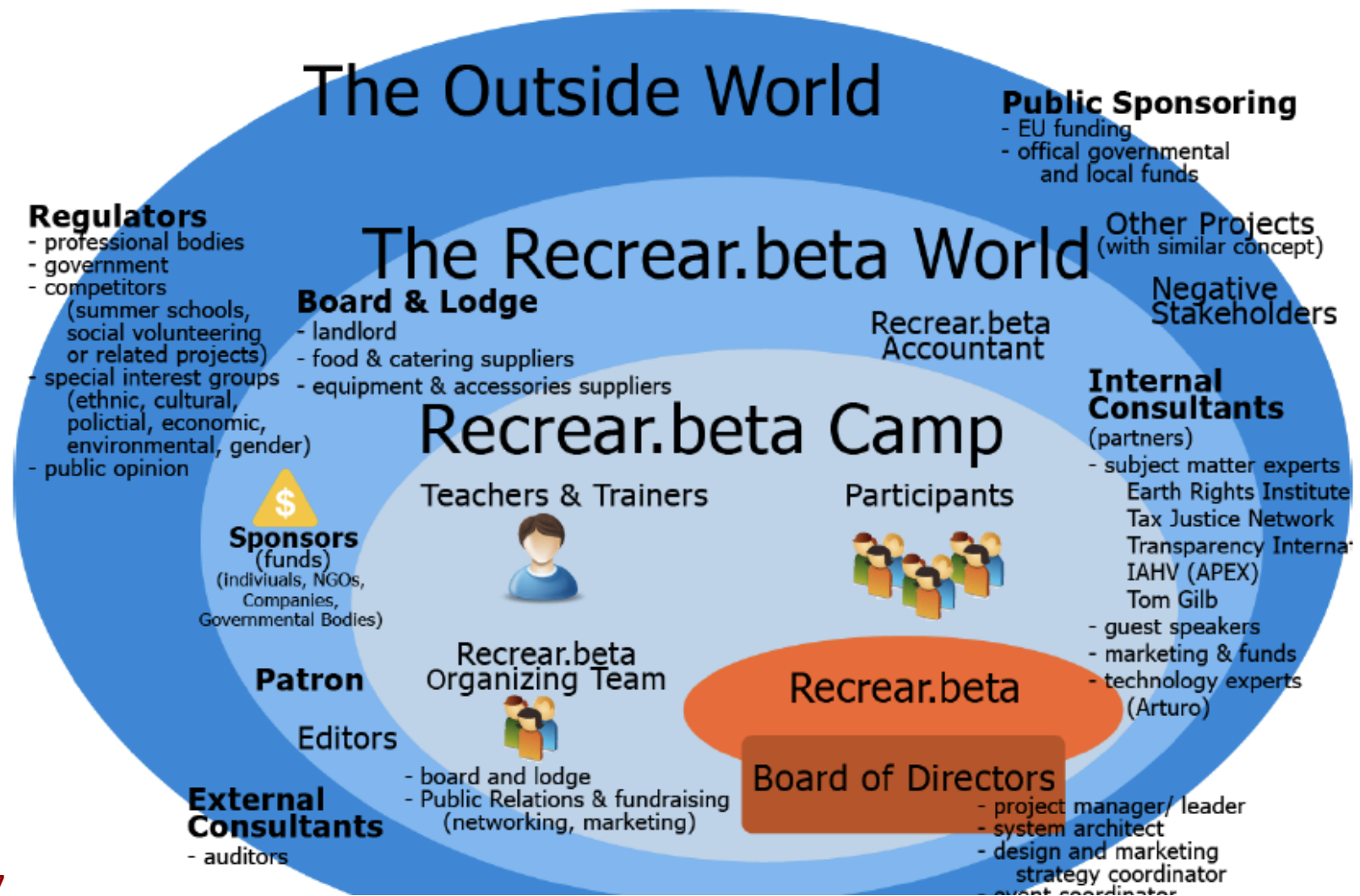
1. Your project has many stakeholders

'Stakeholders' are:

**Any person, group or thing
that can determine our
systems degree of success or
failure,**

- **You need to be aware of your many project stakeholders**
- **There may be 20 to 40 to consider**
- **And certainly far more than one!**
- **If you fail to think about them early,**
 - **They can cause you trouble and delays later**

Stakeholder Map Recrear 2010



Good starting objectives need better definition

Recrear Objectives

**Reach getting
helped**

**Achieve
helping**

Ethics

**Fulfill Basic
Needs**

**Access to
Ressources**

define Objectives better

Recrear Objectives

Recrear Objectives

- 1a** people actively seeking help,
have the opportunity to receive help
- 1b** people who want to help (others),
i.e. people (individuals/ companys/ NGOs) with expertise/ skills/ time/ funds
achieve their goal to help
- 2** ethics and moral behavior established in
 - the corporate and businessworld,
 - NGO and Non-Profit Sector
 - political arena
- 3a** prerequisites have to be given fort the people
to fulfill their basic needs (as stated in HR Charter)
 - food, water, clothing
 - right to work**need source of income to fulfill their needs: right to land**
- 3b** people have access to resources (such as education)
and/or chance to realize their full potential
(i.e. by being fully integrated in society)

And finally, Critical Objectives deserve NUMERIC CLARITY; The 'Ethics' Objective

2 Ethics

Ambition: ethics and moral behavior established in

- the corporate and businessworld,
- NGO and Non-Profit Sector
- political arena

**Measure: % people living morally correct and according
to norms and values of their society**

Status [Africa/ Latin America] < 20%

(Source guess Chris + Zari)

Status [Asia] < 25%

(Source guess Chris + Zari)

Status [Europe/ US] < 8%

(Source guess Chris + Zari)

Status [Near East] < 30%

(Source guess Chris + Zari)

Goal [Worldwide, by 2060] < 35%

Fulfill Basic Needs; Objective

3a Fulfill Basic Needs

Ambition: *prerequisites have to be given for the people
to fulfill their basic needs (as stated in HR Charter)*

- food, water, clothing

- right to work

need source of income to fulfill their needs: right to land

Measure: % people not having the means to fulfill their basic needs

Status [Subsaharan Africa] < 65%

(Source guess Chris + Zari)

Status [Balkans] 35%

(Source guess Chris + Zari)

Status [Germany] 11,5% (Source www.science-at-home.de/gesellschaft/zahlen+fakten)

Goal [Suburban Africa, by 2050] < 40%

Goal [Balkans, by 2030] < 20%

Goal [EU ad US by 2030] < 7%

Access to Resources, Objective

3b Access to Resources

***Ambition: people have access to resources (such as education)
and/or chance to realize their full potential***
(i.e. by being fully integrated in society)

Measure: % people not properly integrated in society

Status [Metropolis in Europe/ US] < 60% (Source guess Chris + Zari)

Goal [Metropolis, by 2030] < 20%

Measure: % people not having access to resources to fulfill their potential

Status [suburban Africa] < 75% (Source guess Chris + Zari)

Status [Balkans] < 60% (Source guess Chris + Zari)

Goal [Suburban Africa, by 2050] < 25%

Goal [Balkans, by 2050] < 15%

Potential Strategies for meeting your objectives

VI

February 10, 2010

VI.3. Potential Strategies - Ways to meet Objectives

- Upgrade website to allow for social networking
- Bring Recrear. Beta to life
- Create volunteer network
- Create network of partners (including private and non profit companies)
- Create Network of clients
- Reach to the public thorough internet and other public media
- Seek help from the EU

Strategies help you reach your objectives

Recrear Objectives

Reach getting helped

Achieve helping

Ethics

Fulfill Basic Needs

Access to Ressources

define Objectives better

Recrear Strategies

Platform for public benefit projects

Chamber of Ethics

Youth projects

Recrear.beta

Rough List of Potential Strategies: Before more-detailed definition

Potential Strategies

- 1** **Platform for Public Benefit Projects** -brainstorm, inspire and connect
place to network and connect resources
place to launch public benefit projects
- 2** **Chamber of Ethics**
promote ethical behavior and good leadership
beginning with programmes (cerification process) and projects
aiming at the corporate and business world
workshops, seminars
promote ethics classes for schools
- 3** **Youth Projects**
proposals by Gioel, Camilla and Zarife. Content to come.
- 4** **Recrear.beta**
Inform and address the publicLectures, workshops
promote IC classes for schools

Youth Projects Strategy: with more-detailed definition

Strategies: Youth Projects

Type: Strategy

Version: January 2010

**Essence: support integration processes around the world,
better their access to resources and empower the youth**

Description:

**Camilla's idea how to bolster the confidence of immigrants
in Europe's metropolis**

Gioel's Intercultural Communication ideas in Palestine

Zarife's plans for projects in Kosovo

- promote HR Charter and its amendment by the right to land
- inform people about injustice in legal, economic and political system (i.e. extralegal sector, right to work but no right to land)

Recrear's Summary of My Ideas

VII.2. Main Ideas from Tom Gilb and People-Centered Planning

- *The wonderful energy of our youth needs to be channeled in the right direction, otherwise it can be wasted and worse the great results they can produce will not happen, or will happen too late.* ([Gilb], 2010)
- *People tend to have unclear objectives, at the wrong level of thinking (the means, not their true ends).* (Gilb, 2009)
- You need to be aware of your many project stakeholders
- and the stakeholder values
- You need to clarify your critical few objectives, so nobody can misunderstand; and so your team can really agree to the same vision.

This is the definite plan that you will use to select good strategies to accomplish your goals.

- You need to rapidly and frequently *week by week* dive into action to deliver some value to some stakeholders
- You need to rapidly learn what is realistic, and change what is not

Never live in the past, but never fail to learn from it. Never live in the future, but never fail to plan for it. Hints for Mankind (Gilb, 2009 (From The AOL Foundation presents Health - Hygiene - Harmony)

'Stakeholders' (AOL)

'Stakeholders are all those people, or groups/types of people who we want to help with our activity and planning.'

- AOL Teachers,
 - AOL Planners,
 - Course Attendees,
 - Gururji Lecture Attendees,
 - Satsang Attendees,
 - Potential AOL Students,
 - Deans of Universities - and many more,
 - family members of AOL devotees.
- Stakeholders:
 - Knowledge
 - ◆ help spread Aol
 - ◆ receive Aol Knowledge
 - ◆ can both help or hinder our activities
 - Soooooo...
 - stakeholders
 - ◆ It is critical to identify stakeholders and their needs, in our planning
 - ◆ in order to carry out our mission effectively.

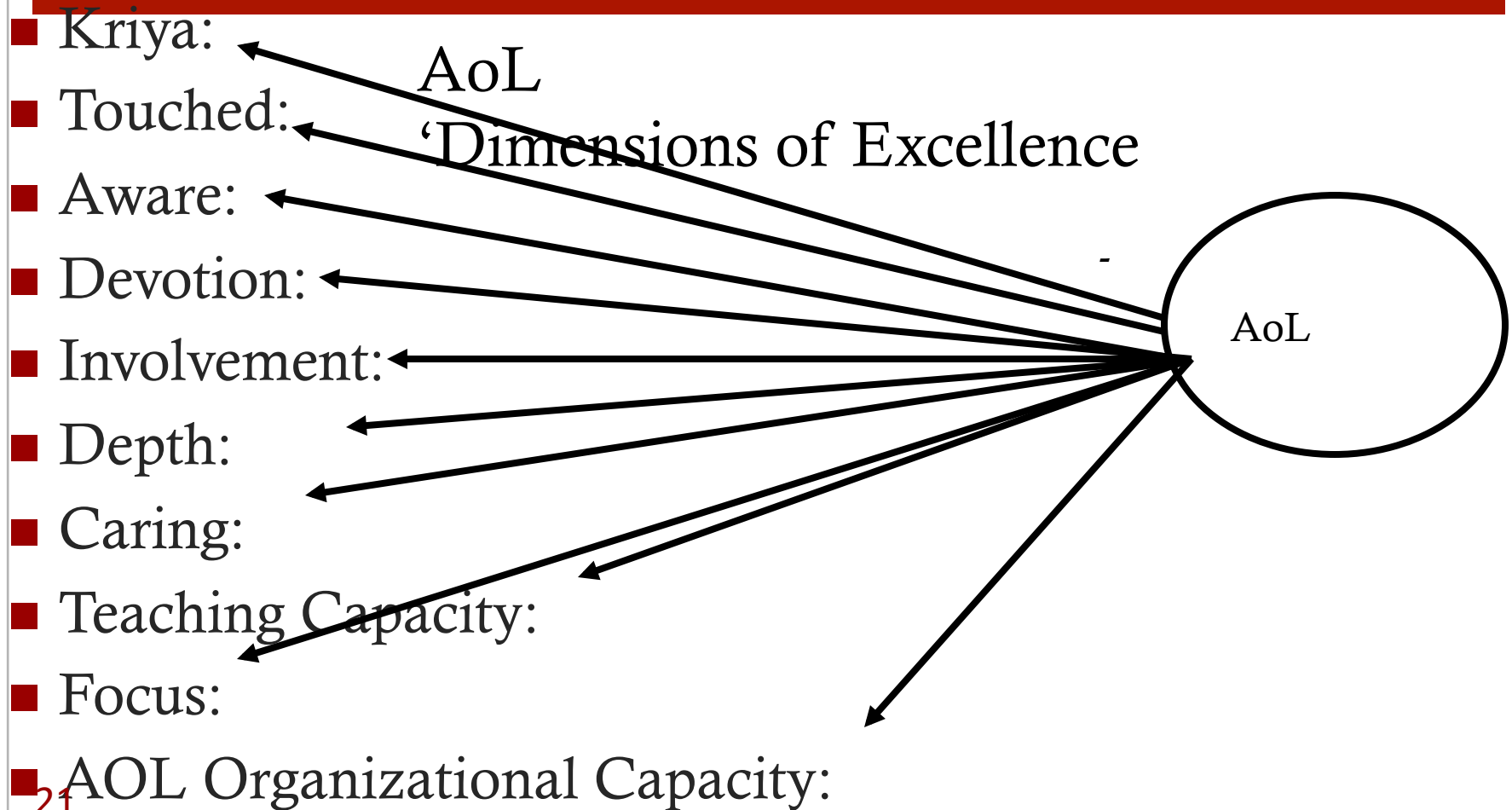
IAHV Stakeholders

- AOL International
- AOL Norway
- IAHV International
- IAHV Norway
- Sister IAHV organizations
- Sri Sri Ravi Shankar
- Norwegian Authorities
- ...

2. and the stakeholder values

- Each stakeholder has several values
 - Some of which we need to understand, respect and help them achieve
 - If we help them, they might help us
 - If we don't care, why should they?

Some Possible (just guesses!) Top Level AOL Objectives (names!)



3. Clarify Critical Dreams

- You need to clarify your critical few objectives,
 - so nobody can misunderstand;
 - and so your team can really agree to the same vision

Advantages from having a 'Definite' goal

1. All actual and potential project/activity members know exactly what we want to achieve.
2. Our project/activity can themselves be free to plan how to reach the goal - 'whatever really works!'
3. Teams know if their plans are working as expected - or if they must change them to succeed
4. Teams can directly see and understand what their activity is contributing to the higher purposes of AOL/IAHV.
5. Teams can themselves adjust their Goals up or down, when they learn what is really possible.
6. We can compare our plans better to the results that other AOL/IAHV activities have achieved and share experience and inspiration better with each other.
7. Teams can better explain their ideas and experiences to each other and to our
23 leaders - in terms of real results, not just effort and good intent.

Defining The Objectives Better (with a scale of measure if possible)

- **Kriya:** number of people who practice Kriya per year
- **Touched:** % who are 'moved by His grace'
- **Aware:** Number of people who consciously will acknowledge that Guruji is a Great Prophet
- **Devotion:** Number of people who profess to be 'Devoted'. *Devoted* = light is kindled about the Knowledge.
- **Involvement:** Hours per month spent by Devotees in AOL activity (both Self and Seva).
- **Depth:** Depth of involvement in an aspect of the Knowledge.
- **Caring:** Individual willingness to assist, help, contribute and serve. *Willingness* = automatic, if asked, when 'pushed'
- **Teaching Capacity:** AOL capacity of qualified teachers.
- **Focus:** 'One pointedness'. Focus on One path.
- **AOL Organizational Capacity:** Qualified capacity to all any non-teaching AOL organizational tasks. (like Planning AOL activity).

Example of clarifying an AOL Objective (discussed in detail with Guruji June 6 2003)

Touched

Ambition: whole world moved by His Grace.

Measure: % of Population who are 'Moved' by His Grace.

Status [Europe, 2003] <1% <-Source: Tom's guess.

Goal [Germany, by 2004] 5% <-Source: Guruji, June 7, 2003?*

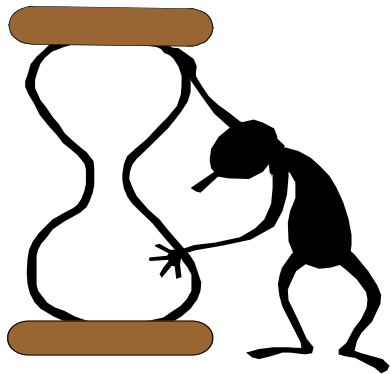
Goal [World, by 3000 AD] 50%?

*** Not really specifically 'approved'. This is just an example of a way of
'being definite' about the goal and the time!**

4. Clear Goals -> Clear Solutions

- These clear goals are the “definite plan” that you will use
 - to select good strategies
 - to accomplish those goals.

1. Are your Goals 'Definite'?



■ Can you '*measure*' that you are accomplishing your goals?

■ Can you *see* if you are 'on time' in reaching your goals?

■ Do all involved understand the same *intent* of the activity or project?



AOL/IAHV
Goals

2. Are your Goals *Relevant*?

Your
Goals

■ Will your goals contribute to AOL/IAHV Main Goals?

■ Are you planning to make the best contribution to AOL/IAHV Main Goals you can make?

■ Will it be clear to all that your project and activity is making a best contribution to AOL/IAHV Main Goals?

3. Are your Goals Written?

■ Teaching Capacity:

■ *Ambition:*

■ Measure: AOL capacity of qualified teachers.

■ Status [Europe, 2003] <-
Source: Tom's guess.

■ Goal [Germany, by 2004]
<-Source: Guruji, June 7, 2003?

■ Goal [World, by 3000 AD

■ Do they have a Name?

■ Do they have an Ambition Level?

■ Do they have a 'Measure'?

■ Do they have a 'Status'?

■ Do they have 'Goals'?

■ Did you discuss them with your team?

■ Are they realistic?

5. Quantify Human Values

- **You should believe and know**
 - **that even qualities and human values**
 - **can be specified numerically and clearly.**
- **They are too precious to specify vaguely!**

More practical examples. If we have time – or for study afterwards

12 June 2009,
AOL at Kongensgate 3 Oslo
Version 11 Sept 09

IAHV Norway
Initial Planning
Objective: show SSRS
June 30, 2009 Oslo

Human Values

- **Human Values**: defined as: <?> More from preamble>, Compassion, Deep caring for life, responsible attitude towards the planet, non-violence, love, friendliness, co-operation, generosity and sharing, integrity, honesty, sincerity, moderation, service, commitment, responsibility, peace, contentment, enthusiasm <- Preamble from IAHV Statues

Objectives [IAHV, Norway]

What definite states of being do we want in time?

Recognition (see next slide for detailed definition of this)

Commitment

Practice

Involvement

Values Awareness: <Individual empowerment>

Default Plan Owners: Chris Byrt, Tom Gilb, Kai Gilb

Recognition

Type: IAHV Norway Top Level Objective.

Owner: IAHV Board Norway

Updated: 11 September 2009

Ambition: steady but fast growth in Norway of those who Recognize IAHV activities and values.

Scale: Probability in %,
that defined Groups,
In fact Recognize defined Properties,
of defined Organizations: Default = IAHV Norway.

Meter: <decide how to measure in practice!>

Goal: [By End = 2011, Group = Adults, Norwegian citizens, Properties = IAHV Educational Programs] 1%

Goal: [By End = 2015, Group = Adults, Norwegian citizens, Properties = IAHV Educational Programs] 50%

Recognize: defined as: they have heard of us, AND <believe> we do good work.

Commitment

**Scale: Number of defined Groups
who publicly sign
a defined Declaration.**

Tolerable [By Early 2010] 10-100 signees.

Impacted By: Training, Lectures

Goal [End 2010] 1000 ± 500 ? <- speculation tsg

**Goal [By End = 2011, Group = Youth, Norway, Declaration
= UN Declaration of Human Rights] 50,000**

**Goal [By End = 2015, Group = Youth, Norway, Declaration
= UN Declaration of Human Rights] 100,000**

Practice

Scale: number of people per year that <Participate> in IAHV organized Activity.

Goal [End 2015, Activity = Any] 10.000

Stretch [End 2015, Activity = Any] 50.000

Goal [End 2015, Group = {Male, Norway, Pensioners}, Act = Non-Violence Training] 5,000 people

Stretch [End 2015, Group = {Female, Norway, Pensioners}, Act = Family Values Training] 10,000 people

Involvement

Scale: average number of Seva hours per year done by IAHV- Norway Seva Warriors for defined [Activity: default = All] for defined [Places, default = Global].

Goal [Begin 2011, Activity = Non-Violence Activity, If Committed] 7±3? Seva Hours

Responsibility: IAHV Norway, Non-Violence Co-ordinator

Goal [End 2010, Activities = All] 2,000 hours

Goal [End 2015, All] 7,000 hours

Goal [End 2010, Places = Global] 500 hours

Goal [End 2015, Global] 2,000 hours

Global = Where value is aimed at countries outside of Norway

Non-Violence Activity: defined as: any human activity directed towards improving the Non-Violence Value. For example lecturing, training, getting petitions signed, planning NV activities, anti mobbing etc.

Values Awareness

Version: 28.9.2009

- **Ambition:** to increase public awareness of the entire set of human value considerations.
- **Fundamentals:** defined as Human Values Basic Ideas. (see definition earlier)
- **Scale:** the % of Human Value concepts that defined [People] can List or define at defined [Level]
- **Goal** [Level = {List, Non-Violence}, People = Course Participants] 95%
- **Past** [Level = List, People = Public] 30%
- **Goal** [Level = List, People = Public] 70%

All Potential “Strategies” ways to meet Objectives

- **Project Financing:**
- **Global Participation:**
- **Successful Impressive Results:** -> Reputation
- **Experience Availability:**-> Fundamentals Awareness
- **Low Threshold Activity:** -> Involvement
- **Personal Human Values Declaration:** -> Fundamentals Awareness
 - <- Tom.
 - -> Value Improvement
- **Human Rights Ratification** by Individuals and Groups <- Marita
- **Social Media:** <Twitter, Facebook> ->
- **Partnering:**
- **Training:** -> Fundamentals Awareness
 - Non-Violence Training -> SEE NEXT SLIDE FOR DETAILED DEFINITION
 - **Family Values Training**
 - **Children Training**
 - **Non-Aggression Programme (NAP)**
 - **Breath Water Sound (BWS)**
- **Seva Credits:** we measure individual and group service time contribution
- **Peace March** <- Anjula 11.9.09, Guruji.
- **Lectures:**
 - **School**
 - **Pensioner**
 - **Evening/Public**
 - **Guruji Event**

Non-Violence Training

- **Type: Strategy.**
 - **Note:** this is a new idea, and it is not the same as Non-Aggression <-CB
- **Version: 7.Sept.2009**
- **Gist:** Training courses or other learning approaches, to teach people something about non-violence as a value and a practice.
- **Description:** (a page or more of detail enough to understand costs and impacts on our goals)
 - **NVC:** Hold NV (at least 4 Quarterly 1 day or 2 evenings) Training Courses at our Sites, studying Ghandi and MLKing, and Alta-Næss non violent practice, with workshop about potential applications in Norway and Europe this year.
 - We ask participants to list Non-Violence Fundamentals, and we ask if they will commit in writing to doing something to further them.
 - **Costs:** development: 1 week work, holding 4 days work/year, followup (design this!! 2 day
- **Impact:**
 - **Stakeholders** = people attending:
 - **95% Fundamentals Awareness** [Non-Violence Values],
 - **Commitment:** we ask participants if they are willing to sign a declaration of commitment
 - **Involvement:** see Goal (about 8 hours annually each)
 - **Practice:** 5000 by 2015 is Goal
- **Implementation Note:** we do not have such an IAHV course ready now (?). But we can imagine developing it with local friends (like Peace friends, Unesco, Prio, Hileys Group, www.fredsundervisning.no/documents/utdanning_kronikk.doc, Google "ikke vold trening", www.forebygging.no/cwobjekter/olweus08022005.doc)

Social Media: <Twitter, Facebook>

■ **Type: Strategy.**

■ **Version: 7.Sept.2009**

■ **Gist: Exploit all internet social media to communicate and motivate people.**

■ **Description:**

■ **Twitter:**

- **International: sites exist AOL and IAHV?, we need to get people using them or create new ones for Norway/Scandinavia/Europe**

■ **Facebook:**

- **International: sites exist AOL and IAHV?, we need to get people using them or create new ones for Norway/Scandinavia/Europe**

■ **Linked In: We have created an IAHV Activist Group (7sep09) for international co-operation with other IAHV activist.**

■ **Email: ?**

■ **Owner: Tom Gilb, 1st member Kai Gilb**

41 ■ **Costs: Some hours to create and publicise, some seva hours to manage and drive forward.**

■ **We need volunteers in each area to manage these.**

■ **Impact:**

■ **Recognition: ? yes**

■ **Commitment: ? yes**

■ **Practice: ? maybe**

■ **Involvement: ? yes**

■ **Fundamentals Awareness ? Only if discussions are started, or leads to people attending other activities**

■ **Implementation Note: we need to get youth to drive twitter and facebook**

■ **Risks: we don't have active enough drivers to make things happen (discussions, join ups)**

■ **Issues: how specialized should we be (Norway/Europe, Board members or any activists)**

■ **Dependencies: active positive people to contribute to discussions and get friends to join**

■ **Owner: Cathrine Larssen ?? Facebook at least!**

■ **Priority: high initial 2009 on, because helps all other things happen and cheap and easy**

■ **Rationale: better communication for many purposes than our Email. Better self updating lists than our email at AOL**

■ **Assumption: this will be really popular, not least amongst youth**

<General Template, Put Tag here>

- Type: Strategy.
- Version: 7.Sept.2009
- Gist:
- Description: (a page or more of detail enough to understand costs and impacts on our goals)
 - - Costs: development
 - Impact:
 - Recognition: ?
 - Commitment; ?
 - Practice: ?
 - Involvement: ?
- Fundamentals Awareness ?
 - Implementation Note:
 - Risks
 - Issues
 - Dependencies
 - Owner
 - Priority
 - Rationale
 - Assumption

Step: Partial Prioritized Actions to implement strategies and get to Objectives

Constraints: what we must avoid

- Breach of Art of Living Ideals, policy, Custom
 - As stated in
- Anything that might risk reflecting badly on AOL or IAHV, or SSRS, or partner organizations.
- Financial rules (% of cash available basis) <-tg
11.9.09

**6.. You need to rapidly and frequently – week by week – dive
into action to deliver some value to some stakeholders**

7. You need to rapidly learn what is realistic, and change what is not

Principles of People-Centred Planning

1. Know your stakeholders - *they* determine your success
2. Know stakeholder values - if you help them, they'll help you
3. State your dreams *clearly* - or they will be misunderstood
4. State your *real* dreams - not the means to get them
5. Choose solutions based on value for effort: efficient ones
6. Make sure solutions work in practice, or change them fast, this week
7. Plan to deliver some value to some stakeholders very early; next week
8. Keep plans *simple*, a page is fine, but keep them *clear*
9. Learn by *results* what works, weekly, change *fast*
10. Involve your stakeholders all the way: help them to help you - and themselves

Ten Golden Questions for Idealistic Organization Planning

1. Are your Goals 'Definite'?
2. Are your Goals Relevant?
3. Are your Goals Written?
4. Are your Goals Agreed?
5. Are your Plans 'Definite'?
6. Are our Plans based on Experience?
7. What have we learned from last time, and planned better?
8. Who is responsible to make it work?
9. Did we estimate the results on our goals?
10. Will we take early, small, frequent result steps ? Do and Learn,
48 do and learn?

Simplified Summary of Planning Principles

- ✓ **Be Clear**
- ✓ **Be Relevant**
- ✓ **Be Effective**
- ✓ **Learn Quickly**
- ✓ **Focus and do well**

Another Summary

- **Focus on cherished results**
- **Get some results very early**
- **Learn fast what works well**
- **It is all about people, respect them and their values – then they will be on your side**

Biographical Information



- **Tom Gilb, is senior partner of Result Planning Limited. He is the author of 9 published books, the latest 'Competitive Engineering' (2005). He is well known worldwide in the software/IT and systems engineering industry for teaching, consulting, and ideas.**
- **He has been on the Board of the Norwegian Art of Living for many years, a Chairperson. He is on the board of the Norwegian IAHV, and a founding member. He helped ReCrear in Planning in Berlin Summer 2010.**
- **His original methods for planning products, including his planning language 'Planguage', have been adopted by major companies worldwide including Microsoft, Boeing, IBM, HP, Intel, Citigroup, Credit Suisse, JP Morgan, Roll Royce, Philips and many others.**
- **is current passion is getting far more value for money from technical projects. He has also pro bono assisted several charities with their planning. More detail at www.Result-Planning.com**

There is a Video of Tom Lecturing on Planning Based on an Evening Lecture in Copenhagen

- Until we get a URL for it ask
- allan@degn.net
 - The editor
- brian@degn.net
 - +45-28517217
 - The Producer

LIFE DESIGN PRINCIPLES

1. If your life goals are unclearly specified, you are unlikely to reach them.
2. If even one single life goal is unclear then it is that goal which will be your problem.
3. Life plans should be implemented evolutionarily so you can adjust to them when you get unexpected results in practice.
4. A life plan will allow you to take the maximum advantage of desirable opportunities and it will help you to avoid problems.
5. You have a choice; plan your life -- or be pushed around by it.
6. Happiness is reaching your goals; a systematic plan will improve the probability of reaching your goals, as well as helping you find realistic goal levels and plans.
7. Ideals cannot always be reached and plans cannot always be kept, but "life planning" will improve your chances of achieving both of these things.
8. Life is too complex to follow a formal design perfectly but life is so vital to us that its very complexity insists on a formal plan.
9. If you don't plan to control your life, then your life will control you.
10. You are the only one who can plan your life: if you don't, then other people's plans will mess it up.