OUTCOME ENGINEERING TOOLBOX

1. Sharing the Vision
2. Declaring the Mission
3. Establishing the Outcome Challenges
4. Mapping the Journeys
5. Redesigning the Delivery System

Barry M. Kibel, Ph.D.
Pacific Institute for Research and Evaluation

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1. What is Outcome Engineering?

Outcome Engineering is a combination planning, self-management, and self-evaluation system. It was developed for use by initiatives that aim to promote fundamental and sustained change in the lives of individuals, families, groups, organizations, or communities. Its use enables these initiatives to present their often-complex work in rich, narrative forms; to track, gauge, and report progress and growth of all key participants; to engage in productive self-reflection; and to pinpoint areas ripe for improvement as well as the types of creative actions most likely to foster these improvements.

Leadership and staffs of initiatives engaged in transformation-focused work have shared a hunger for a simple-to-apply accountability and management system that makes sense, is useful to them, and can be endorsed by their funding sources and other key stakeholders. I believe that Outcome Engineering is that system. Program staffs and community members appreciate Outcome Engineering because it is people friendly and fluid, not cold and lifeless as so many methodologies and analytical tools tend to be. Stakeholders appreciate the timely and rich data, both quantitative and qualitative, that its use generates.

The philosophy underlying the approach, as well as the techniques embodied in it, reflect common sense, field experience, and deep theory. Both the ideas and the techniques have been tested, refined, and retested in wide ranging program areas and contexts. If the thinking was flawed, I heard about it. If a technique was too complicated or abstract, I also heard about that...and made appropriate changes.

Outcome Engineering is a highly descriptive but also normative model. By “descriptive,” I mean it captures what has or is happening. By “normative,” it points to what ought to be happening. It posits the possibility of fundamental individual and community change, helps articulate the directions and the outcomes that are most highly desired, and then offers a unique yardstick for tracking and measuring how close a community, its initiatives, and its members are getting to these desired levels. That yardstick is referred to as the “heroic journey.” It incorporates 45 steps that span the time period from first hearing about an initiative to becoming a recognized master of the issues, opportunities, and skill sets associated with it.
The use of Outcome Engineering focuses attention on results attainment and also on growth attainment. To capture results, up to nine measurable benchmarks, that are progressively more difficult to achieve, are established for each target population group. For example, there can be up to nine benchmarks for pre-school youth to gauge their readiness to enter school. There can be up to nine benchmarks for teens transitioning to the work force. And so on. To capture growth attainment, movement of individuals or groups along the 45-step journey is converted into a status score. Early steps in the journey add one point to the score; later steps add two, three or four points to the score. Scores in the 30 to 40 range indicate significant and sustained changes in group behavior, personal lifestyle, and organizational or community climate.

**Question.** How objective are these benchmarks and journey step markers?

They are as objective as the application users want them to be. Where appropriate and applicable, benchmarks can be defined in physical, measurable terms. They can be linked to test score results. They can be tied to observable behaviors. Or, they can reflect judgements made by program staff or self-reported attitudes or behaviors. Similarly, the steps of the journey can be defined in general terms or made very specific and concrete.

**Question.** What is the connection between the benchmarks and journey step markers?

These two sets of indicators of change are clearly related. The nine benchmarks are grouped as “expect-to-see,” “like-to-see,” and “love-to-see” accomplishments. The journey steps cover transitions from initial successes to complementary successes to sustained lifestyle (or organizational or community cultural) shifts to support provided to peers and onward to systems-level advocacy. As progress advances and deepens, the more difficult benchmarks become more likely.

Journal-keeping is an essential feature of Outcome Engineering. Initiatives may opt to engage in detailed or summary-level journal-keeping, or use a combination of both. These journals may be kept by staff, by clients, or by a combination of both. The journal entries are used to highlight key changes in the individuals or groups featured as well as describe the role played by the initiative in contributing to the reported change. The journal-keeping is integrated with the benchmark and journey marker tracking, resulting in side-by-side text, scores, and indicators of change.
When setting up a new application, care is taken to identify the complete set of individuals, groups, agencies, and institutions that are being impacted through the initiative. Journals, journey markers, benchmarks, and status scores are then generated for as many members of this set as possible. The arrays of data that result, when combined, offer an incredibly rich and informative picture of the overall change process.

**Question.** What would be an example of this?

A program might be working with students who have been identified as having learning differences that prevent them from benefitting from traditional instruction methods or in demonstrating their knowledge through traditional testing methods. That program might include work with the students, with their teachers, and with their parents. To understand, gauge, and improve the multi-level efforts underway, journals should be maintained for all three categories. Unique sets of benchmarks and progress markers would also be used to capture movement for individuals within each category. In addition, changes taking place at the building or district level to support the work of the teachers, parents, students, or program staff might also be tracked through journals and markers.

The five tools that constitute the Outcome Engineering Toolbox are presented here in manual format to produce a stand-alone document. In theory, anyone reading and applying this manual should be able to be productive as an outcome engineer. However, the full power of the approach and its tools is best appreciated and tapped through use of the Internet-version of the tools. Information regarding this version is presented at the end of the document.

**Question.** Why call it “outcome engineering”?

The term “engineering” might appear at first glance to be too cold a word to describe what is meant to be a warm, people-centered process. Nonetheless, I selected that term because it conveyed the deliberate application of thoughtful, data-rich processes toward the solution of difficult challenges (in our case, the challenges inherent in promoting fundamental and sustained changes in the lives of individuals and groups).
2. The Toolbox

The five tools in the Outcome Engineering toolbox individually and collectively promote broadened vision, deepened consciousness, imaginative thought processes, and data-rich inquiry and self-assessment. The elements in their respective designs have been distilled from hundreds of sources and repeatedly tested and refined over decades. They work. An initiative using these tools regularly and conscientiously is positioning itself to become or remain a leader in its field and an inspiration and model for those it intends to impact.

The tools are:

**TOOL 1. Sharing the Vision.** A two-to-three hour group process to explore then describe, in inspired and evocative terms, the type of community that is both possible and desirable.

**TOOL 2. Declaring the Mission.** A one-to-two hour group process to explore then describe, in passionate and provocative terms, the service delivery system that will contribute through its work and impacts to this enlightened community vision.

**TOOL 3. Establishing the Outcome Challenges.** A one-to-two hour group process to identify the key parties (individuals, families, agencies, etc.) for whom change is desired and then articulate in bold terms what the long-term outcome is for each.

**TOOL 4. Mapping the Journeys.** An Internet-based self-management and self-evaluation system used on an ongoing basis for journal-keeping, benchmark and progress tracking, real-time reporting, self-reflection, and cross-site learning.

**TOOL 5. Re-designing the Delivery System.** A combination brain-storming, project refinement, and self-reflection process for use at any time to refine, re-design, or re-invent a service delivery system.

There are different patterns of use. For example, a program requiring an evaluation of its work would focus on tools 3 and 4. A community coalition about to launch an initiative would begin with tool 1, and next request each of its key organizational partners to apply tool 2. Attention would then turn to tool 5, which might be applied by the coalition overall and also separately by its organizational members.
A two-fold intent underlies all use patterns. That intent is to (1) support the transformation of targeted populations while (2) enhancing the quality and increasing the effectiveness of service delivery to these populations. Implied in this aim are positive and sustained changes not only for these populations but also for service delivery staff, other community members, and possibly key outsiders whose decisions and behaviors influence these outcomes.

The use of the complete set of tools is particularly advantageous when applied to large-scale, multi-partner processes aimed at community-wide or system-wide transformation. Tools 4 and 5 support each partner in achieving the transformation-directed outcomes defined through the use of tool 3. As these outcomes are achieved in abundance, the respective missions declared through tool 2 become more actual. As more of these missions are actualized, the vision shared and articulated through tool 1 emerges as the prevailing reality.
3. TOOL 1. Sharing the Vision

“A picture lives with the life you put into it. If you put no life into it—no thrill, no concentration of delight or exaltation of visual discovery—then the picture is dead, like so many canvasses, no matter how much thorough and technical work is put into it.”

D. H. Lawrence

Initiatives need to demonstrate to both the populations they serve and to their supporters that they are rooted to the earth and not frivolous. However, they too often go overboard, substituting cleverness for genius. Spirit, the genesis for genius, is as earthbound as is intellect, the seat of cleverness. It is just more elusive, less obvious, but more potent—and hence, more valuable when tapped by the initiative as a resource. The first and most obvious place for a initiative to establish its alignment with spirit—and the genius capability—is in its vision statement. Here, it has an opportunity to declare to its staff, clients, partners, and others what it values and where it can make its most profound contributions. If the initiative can choose the words and word rhythms of its vision statement artistically, it is likely to strike a responsive chord in those who read or hear these words. The initiative’s excitement becomes their excitement, its vision their vision.

Here is one of my current favorite vision statements. It was composed at the YWCA in Columbus, Ohio, for its anti-racism project. It strikes an immediate chord of response in those who value the same anti-racism, pro-people vision. Is this statement pie-in-the-sky thinking? Or, rather, does it prefigure the society that I, for one, and hopefully you for two, would choose to live in and be part of?

Throughout central Ohio, individuals and organizations are penetrating the artificial walls that breed racism and meeting one another with fresh eyes and open hearts. Formal and natural leaders committed to racial equality are emerging everywhere. Compelling programs and activities impassion individuals and groups to expect, be attentive to, and work to insure racial equity. Organization, groups, and individuals spontaneously come together to celebrate their awakenings. Everyone finds inspiration and fulfillment in contributing to this work, recognizing it as integral to broader social transformation and a community healing process.
The power of the appeal to one’s heart strings is what really separates the brilliant from the simply adequate vision statement. The brilliant statement draws readers (or listeners) into the vision of the initiative, allowing them to picture themselves living and possibly adding to its worth, and feeling good that such a world is being pursued by the initiative. The mission statement, as I will discuss in the next section, then completes the 1-2 punch by adding detail regarding how the initiative itself conducts its affairs with spirit and intention in support of the vision.

The purpose of the vision statement is not to inform the reader (or listener) regarding the goals and challenges of the initiative. Its purpose is to make clear--to the reader and the world—the degree of spirit through which the initiative is operating. Is this an initiative that I can personally identify with? Do I agree with its values? Do I want to be identified with it? These are questions that the vision statement should allow the reader to ask and immediately answer in the affirmative. Further, if well crafted, that statement will awaken some of that same spirit in the reader—forging a spirit-to-spirit connection with the initiative that transcends information. If we read a vision statement and are just left with information, the statement has failed the initiative.

**Composing a Vision Statement**

A vision statement can be composed at any time during the life of an initiative. It builds layer by layer, element by element, and results in a vivid and compelling description of a transformed reality that the initiative intends to be a partner in creating. Once the vision statement is composed, it should stand the test of time and remain in tact or only require modest changes from that time forth.

To be timeless (a virtue of the spirit mode), the vision statement needs to incorporate and weave together enduring values and images. For example, here is a sure-fire recipe for constructing a vision statement for a school system. Start with children who look forward to school, find challenges and rewards in learning, master both universal skill sets and talent areas of their own choosing, perform brilliantly in solo and team activities, readily and effectively support their peers, and show appreciation and exhibit respect for their teachers and other adults. Next, add teachers who are well-trained, eager to apply their training in ways that inform and delight their students, make effective and innovative use of technology, draw freely on the rich resources of the community and environment to expand the perspectives of their students, and partner with their peers and others to add variety and depth to their teaching experiences. Add to this mix, helpful and appreciative parents, enlightened administrators and Board members, user-friendly technologies, and
talented community volunteers. Blend these together and we have a vision worth pursuing by any school system.

I recommend a four-step procedure for constructing vision statements of this sort, namely those that are aligned with spirit. These steps are:

Step One. Warm-up discussion  
Step Two. Compiling snapshots of utopia  
Step Three. Crafting the vision statement draft  
Step Four. Purging the jargon

Each of these steps is described below in detail.

While the procedure works with groups of any size, I find groups of 5-15 persons to be ideal for activities of this sort. With a group of this size, each participant can play a constructive part. With larger groups, individuals tend to get lost. There may be the illusion of lots of input from lots of people, but personal contributions from most participants tend to be marginal. If there are lots of stakeholders who need to be part of the process, to give it legitimacy, then I suggest a staged approach, as discussed at the end of this section.

A facilitator is required, as is a computer hooked up to a projection system. That individual has got to be good with words, a skilled listener, comfortable working on a computer, and intent on having the group compose a vision statement that is inspirational as well as an honest reflection of the deep values of the group and initiative. The facilitator sits in front of the computer and types in key comments and other contributions using any word processing package with which he or she is adept. The group sees what is being typed on a wall screen and can immediately suggest corrections. If a printer is available, at key points in the process, work of the group can be printed, copied, and distributed to the participants.

The use of chart paper is a poor alternative. First, ideas never seem to get translated to the paper the way they are said. Second, it is hard to move comments around to get them into a coherent order. And third, what I personally hate most, the group’s ideas are spread around the room (usually taped or pinned to walls) rather than integrated into a single whole. This gives the process the feel of being fragmented, while it is just the opposite—a feeling of wholeness—that is desired.
Step One. Warm-Up Discussion

To begin the process and create some focus for the group, the facilitator requests one of its members to provide some background. The individual selected should be the most senior member of the initiative who is present and/or the one who has been delegated to implement a major new project or initiative. The facilitator might use a simple prompt like the following to launch the process, “Can you say a few words about the initiative (or project), its history, and where it is heading?” As the individual responds, the facilitator must feel comfortable interrupting to ask clarifying questions. The intent is to make certain that everyone present, including the facilitator, has a clear sense of the direction of the initiative.

Example:

*Director:* The West African Rural Foundation was established a little more than ten years ago. Initial funding came from the Ford Foundation and Canada’s International Development Research Centre. Our mission at that time was to promote local governance. We trained local farmers throughout the region to conduct environmental scans, identify their resources as well as needs, and develop simple action plans for moving forward. This was very new to the farmers, but much appreciated. We often spent as long as two weeks in a community working through the process, to make certain we left them with some concrete results.

*Facilitator:* Did you encounter resistance?

*Director:* Of course. Local leaders were suspicious. Who were we and what were we up to? A lot of groundwork was prepared before we were actually invited into a village. But as our reputation spread, this became easier. Also, our methods were very respectful of the populations we reached and mindful of the cultures and politics of the villages and surrounding regions... As our methods and protocols took shape and were refined in the field, we began training others to conduct these events and offer follow-up assistance. The region was too large and the need too great for us to do it all alone.
Example (continues):

Facilitator. How has this worked out?

Director. Very well. We now have hundreds of trained individuals and teams who we can draw on to provide this training with quality. Of course, we continue to monitor what they do to the extent that our resources allow. And we are now entering a new phase of our work...

Depending on the natural dynamics of the group, others might step in to add some comments. This is desirable, since the aim is to get everyone contributing as the procedure continues. However, the facilitator has to remain alert to make certain that this warm-up step does not drag on and on. This will set the wrong tone and pace. The warm-up discussion ought to take no more than ten to fifteen minutes to complete.

The facilitator does not do any recording during this first step. At best, the facilitator might choose to scribble down some notes on a pad for personal reference, particularly if not an insider with first-hand knowledge of the initiative.

Step Two. Compiling Snapshots of Utopia

The facilitator requests each team member to work alone for a few minutes and list two responses to the following prompt:

“It is sometime in the not-too-distant future (say, two or three years from now). Our efforts and those of our partners have exceeded all expectations. In fact, our community (target population, system, etc.) is in a class by itself and has attracted the attention of the world. Individuals and groups from across the nation and around the globe are knocking at our doors wanting to learn how we did it so well and so quickly. Name two things that they see as they look around our community (target population, system, etc.) that they might not see in their own communities (target populations, systems, etc.) and would not have seen here two or three years earlier? Do not be afraid to use goose bump-producing language in your responses!”

The facilitator then invites members of the group to report their two responses, in turn. These are captured on a list that the facilitator types into the computer. Similar responses are combined where possible or repositioned next to each other. The facilitator asks for clarification of any response that is unclear--since the complete set of responses will need to be integrated during the next step in the procedure.
**Example:**

An increasing portion of the total production system resides within the control of farmers and farmer organizations.

Rural peasants and farm organizations are gaining the information, skills, experiences, and know-how to compete effectively, innovatively, and successfully in regional and global markets. West African products are of high quality and enjoy appeal worldwide.

This step serves several purposes. First, it provides the content for the vision statement. Second, it demonstrates that the process being used is participatory and democratic. Third, it gets the group thinking in ideal terms. Fourth, it encourages the use of superlatives.

It works well to require the group to project its utopia out only two or three years. If asked to think far out into the future (say, 10 or more years forward), there is a tendency toward science-fiction responses rather than toward new realities of deeper quality. People are used to five-year projections. However, the five-year time perspective tends to encourage extrapolations rather than deeper thoughts. Ironically, going out only two or three years while declaring that wondrous changes have taken place, gets the participants into the right frame of mind to think boldly.

**Step Three. Crafting the Vision Statement Draft**

During a break (minimum 15 minutes), the facilitator combines the list of responses into a draft vision statement. This step requires some skill. The facilitator may choose to ask a group of two or three volunteers to help compose the draft statement. The draft statement does not have to repeat the wording in the original responses exactly. Some creative license is encouraged so long as the intended meaning of the contributor is not distorted. Of importance, when the full team reconvenes after the break, and the draft statement is read aloud, it should evoke a spontaneous expression of approval from the group.
Example:

Throughout the region of West Africa, rural peasants and farm organizations are gaining the information, skills, experiences, and know-how to compete effectively, innovatively, and successfully in regional and global markets. With constant attention to sustainable development and fuller utilization of valuable rural resources, profitable agricultural companies are being established and managed by farmers which contribute meaningfully to the viability and vitality of rural households. An increasing portion of the total production system resides within the control of farmers and farmer organizations. These organizations have established diverse and multi-level networks for insuring market stabilization and for maximizing exchanges of resources and information for mutual benefit as well as the benefit of others in the region and leading to the image of West African products as being of high quality and appeal worldwide.

The draft statement should tell a story that is vivid and compelling. In the example, we read of a West Africa that has leap-frogged from the 19th to the 21st century. It was composed by economists and so is less goose-bumpy than might otherwise be the case. Still it captures the imagination and offers hope and direction.

Step Four. Purging the Jargon

The purpose of this final step in the procedure is to refine the draft statement. The facilitator reads the statement slowly (or invites someone from the group to read it), requesting participants to interrupt if a problem word or phrase is read that is culturally insensitive or politically charged. If detected, the problem area is discussed and an attempt made to remedy it with alternative wording. All group members are encouraged to offer suggestions for the rewording. When the wording is resolved, the facilitator makes these changes to the statement and the reading continues. This procedure is followed until the entire statement has passed this first test (i.e., no insensitive or politically charged words and phrases remain).

The same individual (or, for variety, another member of the group) is asked to read the statement again, as revised. This time, the facilitator requests participants to raise their hand and stop the reading if they feel that jargon or overly technical terms are being used. Such words or phrases are underlined or highlighted by the facilitator and the reading continues. When the reading of the statement has been completed, the words or phrases that have been underlined are transferred to the top line of the Purging the Jargon Chart below. If there are more than five such words or phrases, the ones that
appear to bother the team the most are selected first. If time permits, the others are then modified using the process as next described.

**PURGING THE JARGON CHART**

<table>
<thead>
<tr>
<th></th>
<th>WORD OR PHRASE 1</th>
<th>WORD OR PHRASE 2</th>
<th>WORD OR PHRASE 3</th>
<th>WORD OR PHRASE 4</th>
<th>WORD OR PHRASE 5</th>
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<td>1</td>
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</tbody>
</table>

For each word or phrase selected, in turn, the facilitator asks participants to call out other ways of saying the same thing (without reference to the full statement). They are not limited to exact synonyms. These are listed on the chart. The goal is to find four such options for each of the selected words or phrases.

**Example:**

Throughout the region of West Africa, rural peasants and farm organizations are gaining the information, skills, experiences, and know-how to compete effectively, innovatively, and successfully in regional and global markets. With constant attention to sustainable development and fuller utilization of valuable rural resources, profitable agricultural companies are being established and managed by farmers which contribute meaningfully to the viability and vitality of rural households. An increasing portion of the total production system resides within the control of farmers and farmer organizations. These organizations have established diverse and multi-level networks for insuring market stabilization and for maximizing exchanges of resources and information for mutual benefit as well as the benefit of others in the region and leading to the image of West African products as being of high quality and appeal worldwide.
PURGING THE JARGON CHART

<table>
<thead>
<tr>
<th></th>
<th>rural peasants</th>
<th>innovatively</th>
<th>sustainable development</th>
<th>profitable</th>
<th>vitality</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>rural poor</td>
<td>with imagination</td>
<td>attention to environment</td>
<td>money-making</td>
<td>prosperity</td>
</tr>
<tr>
<td>1</td>
<td>farmers</td>
<td>taking risks</td>
<td>protection of resources</td>
<td>worth doing</td>
<td>health</td>
</tr>
<tr>
<td>2</td>
<td>farm workers</td>
<td>creatively</td>
<td>long-term development</td>
<td>job-generating and income-producing</td>
<td>energy level</td>
</tr>
<tr>
<td>3</td>
<td>villagers</td>
<td>in new ways</td>
<td>holistic development</td>
<td>competitive</td>
<td>optimism</td>
</tr>
</tbody>
</table>

The facilitator or a volunteer reads the part of the statement that contains the first word or phrase that was found lacking—in the example, the first sentence of the draft statement that includes the term ‘rural peasants’—each time substituting one of the alternatives from the chart. In some cases, it may be necessary to modify the grammar for readability. When all four options have been read, the facilitator asks the team members to vote by a show of hands for the variation they like best (including the original wording). If there is a clear majority, that option is substituted; if not, the facilitator leads a discussion of the options and then asks for a re-vote—with the highest vote-getter being selected.

The process is repeated for the other words or phrases on the chart. The selected words or phrases are then substituted in the vision statement for the original wording.

As a final activity, the facilitator or a volunteer reads the statement in full with the changes, asking group participants to note anything in the statement that they might find still jarring to the ear (e.g., poor grammar or redundant phrases). If any words or phrases are identified, or if statements seem too lengthy or out of order, the facilitator asks the group for suggestions for improvement. These changes are made and the statement is read one last time.
Before:
Throughout the region of West Africa, farmers and farm organizations are gaining the information, skills, experiences, and know-how to compete effectively, creatively, and successfully in regional and global markets. With constant attention to sustainable development and fuller utilization of valuable rural resources, competitive agricultural companies are being established and managed by farmers which contribute meaningfully to the viability and prosperity of rural households. An increasing portion of the total production system resides within the control of farmers and farmer organizations. These organizations have established diverse and multi-level networks for insuring market stabilization and for maximizing exchanges of resources and information for mutual benefit as well as the benefit of others in the region and leading to the image of West African products as being of high quality and appeal worldwide.

After:
OUR VISION STATEMENT: Throughout the region of West Africa, farmers and farm organizations are gaining the information, skills, experiences, and know-how to compete effectively, creatively, and successfully in regional and global markets. With constant attention to sustainable development and fuller utilization of valuable rural resources, competitive agricultural companies are being established and managed by farmers. These enterprises contribute meaningfully to the viability and prosperity of rural households. An increasing portion of the total production system resides within the control of farmers and farmer organizations. These organizations have established diverse and multi-level networks for insuring market stabilization and for maximizing exchanges of resources and information for mutual benefit as well as the benefit of others in the region. As a consequence, the image of West African products is associated with high quality and appeal throughout the world.

This entire procedure for constructing the vision statement should take no more than two to three hours. As the statement is used, refinements in language might be suggested. So long as the spirit is not lost, these changes should be made by the organization.

Involving Large Numbers of Stakeholders

As noted above, I do not recommend working through this procedure with groups larger than 15 or so persons. It can be done, but more seems to be lost than is gained in terms of group dynamics and creative energy exchange. Where the initiative really needs buy-in and active participation from a much larger group of stakeholders, I suggest using a
staged approach that mirrors the one just presented; however, that is accomplished using communications technology rather than at a live meeting involving all participants.

In the first stage, participants are invited to be part of the group that will be composing the vision statement, are given a general description of the process that will be followed, and, as a first step, are requested to provide two responses to the prompt used in Step Two. This stage can be accomplished by telephone, mail, or--ideally--using e-mail. The facilitator compiles these responses and converts them to a draft vision statement.

In the second stage, roughly two weeks later, the participants each receive a copy of the draft statement and are asked to indicate and suggest alternative wording for any words or phrases they find to be jargon, offensive, confusing, or overly technical. Again, telephone, mail, or ideally e-mail is used for this interaction. The facilitator reviews these suggestions and integrates them into the statement. The draft final version is shared with a review team designated by the initiative and revisions are made, as deemed appropriate.

In the final stage, again roughly two weeks later, the participants receive copies of the draft final version of the vision statement. They are thanked for their participation in the process and asked to suggest any final changes they feel are still warranted. The review team considers these suggestions and makes any final changes.
TOOL 2. Declaring the Mission

“The essential aspect of the executive function in big business is the sensing of the organization as a whole and the total situation relevant to it. It is a matter of art rather than science and is aesthetic rather than logical. Our logical methods and our endless analysis of things have too often blinded us to an appreciation of structure and organization. To understand the society you live and work in, you must feel it—which is exactly what you do with the non-logical mind. To cope with complexity, we need the corrective of the feeling mind and of the spirit that perceiving of the concrete part encompasses also the intangibles of the whole.”

Chester Barnard

One of my current favorite mission statements was composed in relay fashion. The first version was drafted by a group of parish nurses from Cincinnati. It was reviewed, applauded, and revised slightly by a team of parish nurses from Hollywood, California. The statement moved on to Hampton Roads, Virginia where it was tweaked a bit. Its current version includes some additional refinements by a group of parish nurses from the Venice-Port Charlotte region of Florida. It reads:

OUR MISSION. As parish nurses, we promote whole-person (i.e., physical, mental, social, and spiritual) health to a diverse spectrum of congregations and communities. We use our skills, insights, and calling to explore with people their values and beliefs, and nurture and sustain them in their personal and shared journeys toward whole-person health. We remain particularly alert and responsive to the needs and aspirations of the underserved and work with them so that they may pursue and achieve optimal personal health. We serve individuals and groups by educating, counseling, and advocating. We are integral collaborators and partners with other social and health systems. We learn with and from our peers, our partners, and those we serve. Through our service, we make visible and tangible the healing ministry that is rooted in the core of our faith traditions. In sum, we identify, cultivate, and blend creatively the resources and skills of health and faith communities in ways that empower people to make responsible and healthy choices and find deeper meaning in their lives.

I find the blending of health and spiritual language in this statement to be particularly masterful. It does not come off sounding like two different worlds struggling to find their area of intersect. It is a general but also very personal statement. If written in the
singular, the statement would neatly capture the work and spirit of the hundreds of parish nurses I have had the fortune to meet and consult with during the past few years—although most would be too modest to use this language in reference to themselves.

**MY CALLING.** As a parish nurse, I promote whole-person (i.e., physical, mental, social, and spiritual) health to a diverse spectrum of congregations and communities. I use my skills, insights, and calling to explore with people their values and beliefs, and nurture and sustain them in their personal and shared journeys toward whole-person health. I remain particularly alert and responsive to the needs and aspirations of the underserved and work with them so that they may pursue and achieve optimal personal health. I serve individuals and groups by educating, counseling, and advocating. I am an integral collaborator and partner with representatives from other social and health systems. I learn with and from my peers, my partners, and those I serve. Through my service, I make visible and tangible the healing ministry that is rooted in the core of my faith tradition. In sum, I identify, cultivate, and blend creatively the resources and skills of health and faith communities in ways that empower people to make responsible and healthy choices and find deeper meaning in their lives.

One additional example of a powerful and spirited mission statement comes to mind. Project Exposure is a federally supported program in Atlanta directed at young mothers. Its vision is to help produce a generation of young women who have created happy, productive, spiritual lives and are positive, inspirational role models for their children. Its mission reads:

In support of this vision, we at Project Exposure use African-centered methodology reflecting respect, cooperation, and dignity in our on-going, mutually supportive interactions with one another. The staff also work collaboratively with school systems, social services, and governmental agencies to identify and support young women and families in need of assistance. The team builds strong and lasting relationships with these women so as to foster healthy and productive behaviors and positively impact their family life and structure. Through continued learning and sustained commitment to excellence, we continue to grow as individuals, as a team, and as service providers, community leaders, and project managers. We make effective use of technology to support our mission. We respond to feedback in an open and non-defensive manner and exhibiting ingenuity in improving practices based on this feedback. We engage college and university students as well as older adults as part of our workforce and learning community. As an organization, our leadership greatly appreciates the unique contributions that each staff member and volunteer brings; provides assistance and training in a non-judgmental
fashion when needed; and expects, acknowledges, and rewards outstanding performance.

This mission statement reflects a shared insight of the Project Exposure team that the success of their initiative is linked to the spirit in which they operate individually and as a team to support these young mothers. They aim to be a model community in miniature and serve as an inspiration to these women, other service agencies, schools, and neighborhood groups.

**Composing the Mission Statement**

I recommend a three-step procedure to construct the mission statement for an organization (or project). It is very similar to the one used to compose the vision statement and typically this procedure is used immediately after completing the vision statement. However, it can be done as an independent exercise. Whereas the vision statement looks *outward* at the idealized impact of the work of the organization and its boundary partners, the mission statement looks *inward* at the organization and how it operates—again, in ideal terms. This statement describes the enlightened processes that the organization uses in working toward its goals or vision.

These steps are:

- Step One. Compiling snapshots of utopia
- Step Two. Crafting the mission statement draft
- Step Three. Purging the jargon

Each of these steps is described below in detail. The reader will note that I have repeated many of the comments made in the previous section, where these apply, so that this section can stand on its own for those choosing to use it as a guide.

While the procedure works with groups of any size, I find groups of 5-15 persons to be ideal for activities of this sort. With a group of this size, each participant can play a constructive part. With larger groups, individuals tend to get lost. There may be the illusion of lots of input from lots of people, but personal contributions from most participants tend to be marginal. If there are lots of stakeholders who *need* to be part of the process, to give it legitimacy, then I suggest a staged approach, as discussed at the end of this section.
A facilitator is required, as is a computer hooked up to a projection system. That individual has got to be good with words, a skilled listener, comfortable working on a computer, and intent on having the group compose a mission statement that is inspirational as well as an honest reflection of the deep values of the group and business. The facilitator sits in front of the computer and types in key comments and other contributions using any word processing package with which he or she is adept. The group sees what is being typed on a wall screen and can immediately suggest corrections. If a printer is available, at key points in the process, work of the group can be printed, copied, and distributed to the participants.

**Step One. Compiling Snapshots of Utopia**

The facilitator requests each team member to work alone for a few minutes and list two responses to the following prompt:

Option 1. If a vision statement has been composed, the prompt is: “How best might the organization contribute to realizing our vision?”

Option 2. If there is no vision statement, use this prompt instead: “It is sometime in the not-too-distant future (say, two or three years from now). Our success has exceeded all our expectations. In fact, our way of doing business has become the envy of the field and a model that others are anxious to learn and use. Name two things that they see as they look around at our organization (or project) that they would not have seen here two or three years earlier? Do not be afraid to use goose-bump producing language in your responses!”

The facilitator then invites members of the group to report their two responses, in turn. These are captured on a list that the facilitator types into the computer. Similar responses are combined where possible. The facilitator asks for clarification for any response that is unclear—since the complete set of responses will need to be integrated during the next step in the procedure.
Example (from a Drug-Free Community Coalition in Ohio):

Ongoing efforts are underway to locate and engage new community members with diverse talents in youth development activities.

We routinely communicate with other Drug-Free Community Coalitions to share successes and lessons learned.

Regular celebration activities are held to recognize successes attributable to individuals and teams as well as community-wide gains.

The evaluation function is integrated into all aspects of the community’s approach to youth development to insure that we are building on our successes and not repeating mistakes.

Every sector of the community has become engaged in concerted youth development activities.

Youth are receiving outstanding skill training and mentoring to fully tap their latent abilities and potentials as agents of change in the community.

This step serves several purposes. First, it provides the content for the mission statement. Second, it demonstrates that the process being used is participatory and democratic. Third, it gets the group thinking in ideal terms. Fourth, it encourages the use of superlatives.

It works well to require the group to project its ideal work climate out only two or three years. If asked to think far out into the future (say 10 or more years forward), there is a tendency toward science fiction responses rather than toward new realities of deeper quality. People are used to five-year projections. However, this time perspective tends to encourage extrapolations rather than deeper thoughts. Ironically, going out only two or three years while declaring that wondrous changes have taken place, gets the participants into the right frame of mind to think boldly.

Step Two. Crafting the Mission Statement Draft

During a break (minimum 15 minutes), the facilitator combines the list of responses into a draft vision statement. This step requires some skill. The facilitator may choose to ask a group of two or three volunteers to help compose the draft statement. The draft statement does not have to repeat the wording in the original responses exactly. Some creative license is encouraged, so long as the intended meaning of the contributor is not distorted. Of importance, when the full team reconvenes after the break and the draft
statement is read aloud, it should evoke a spontaneous expression of approval from the group.

Example:

**OUR MISSION:** We, at the Drug-Free Community Coalition, affirm that substance abuse is incompatible with a healthy community. We promote community-wide, social norms that reflect low/no tolerance for substance abuse and establish environments throughout the community that support healthy choices and behaviors. Our coalition brings youth and adults to the table as equal partners in promoting and making possible a community that we are all proud to call ‘home’. Youth are engaged fully in all aspects of community activity (planning, funding decision-making, fund seeking, implementation, etc.). They are receiving outstanding skill training and mentoring to fully tap their latent abilities and potentials as agents of change in the community. Their parents and other adults play key supportive roles to assist our youth in assuming leadership responsibilities for youth development efforts in the community.

Ongoing efforts are underway to locate and engage new community members with diverse talents in youth development activities. Complete and accurate information regarding the challenges and opportunities facing each community are available for deliberation and as a focus for action. Youth and adults work in teams to conduct environmental scans and other community information/resource gathering activities. Youth have independent opportunities to review and make suggestions to the community based on environmental scan and other data. Comprehensive approaches are being employed that span the full spectrum of universal, selective, and indicative strategies of prevention. The evaluation function is integrated into all aspects of the community’s approach to youth development.

Regular celebration activities are held to recognize successes attributable to individuals and teams as well as community-wide gains. Frequent interaction with our partner community takes place to receive and offer feedback on respective community efforts. We routinely communicate with other Drug-Free Community Coalitions to share successes and lessons learned.

The draft statement should describe the work of the organization (or project) in vivid and compelling terms. In the example, we read of a community effort against substance abuse that is attempting to maximize the involvement of the youth of the community. Because a large group with similar but different takes on substance abuse prevention were involved as contributors to this mission statement, it covers a lot of territory (e.g., beliefs, youth involvement, data collection, evaluation, and community celebrations). It probably has more detail than is necessary. But this extra material does not hurt, and allows the contributors to see their words and thoughts respected and blended in with those of others.
Step Three. Purging the Jargon

The purpose of this final step in the procedure is to refine the draft statement. The facilitator reads the statement slowly (or invites someone from the group to read it), requesting participants to interrupt if a problem word or phrase is read that is *culturally insensitive or politically charged*. If detected, the problem area is discussed and an attempt made to remedy it with alternative wording. All group members are encouraged to offer suggestions for the rewording. When the wording is resolved, the facilitator makes these changes to the statement and reading continues. This procedure is followed until the entire statement has passed this first test (i.e., no insensitive or politically charged words and phrases remain).

The same individual (or, for variety, another member of the group) is asked to read the statement again, as revised. This time, the facilitator requests participants to raise their hand and stop the reading if they feel that *jargon or overly technical terms* are being used. Such words or phrases are underlined or highlighted by the facilitator and the reading continues. When the reading of the statement has been completed, the words or phrases that have been underlined are transferred to the top line of the Purging the Jargon Chart. If there are more than five such words or phrases, the ones that appear to bother the team the most are selected first. If time permits, the others are then modified using the process as next described.

**PURGING THE JARGON CHART**

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<th>WORD OR PHRASE 1</th>
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For each word or phrase selected, in turn, the facilitator asks participants to call out other ways of saying the same thing (without reference to the full statement). They are not
limited to exact synonyms. These are listed on the chart. The goal is to find four such options for each of the selected words or phrases.

Example:

OUR MISSION: We, at the Drug-Free Community Coalition, affirm that substance abuse is incompatible with a healthy community. We promote community-wide, social norms that reflect low/no tolerance for substance abuse and establish environments throughout the community that support healthy choices and behaviors. Our coalition brings youth and adults to the table as equal partners in promoting and making possible a community that we are all proud to call 'home'. Youth are engaged fully in all aspects of community activity (planning, funding decision-making, fund seeking, implementation, etc.). They are receiving outstanding skill training and mentoring to fully tap their latent abilities and potentials as agents of change in the community. Their parents and other adults play key supportive roles to assist our youth in assuming leadership responsibilities for youth development efforts in the community.

Ongoing efforts are underway to locate and engage new community members with diverse talents in youth development activities. Complete and accurate information regarding the challenges and opportunities facing each community are available for deliberation and as a focus for action. Youth and adults work in teams to conduct environmental scans and other community information/resource gathering activities. Youth have independent opportunities to review and make suggestions to the community based on environmental scan and other data. Comprehensive approaches are being employed that span the full spectrum of universal, selective, and indicative strategies of prevention. The evaluation function is integrated into all aspects of the community’s approach to youth development.

Regular celebration activities are held to recognize successes attributable to individuals and teams as well as community-wide gains. Frequent interaction with our partner community takes place to receive and offer feedback on respective community efforts. We routinely communicate with other Drug-Free Community Coalitions to share successes and lessons learned.

The facilitator or a volunteer reads the part of the statement that contains the first word or phrase that was found lacking—in the example, the second sentence of the draft statement that includes the term ‘establish environments’—each time substituting one of the alternatives from the chart. In some cases, it may be necessary to modify the grammar for readability. When all four options have been read, the facilitator asks the team members to vote by a show of hands for the variation they like best (including the original wording). If there is a clear majority, that option is substituted; if not, the facilitator leads a discussion of the options and then asks for a re-vote—with the highest vote-getter being selected.
The facilitator or a volunteer reads the part of the statement that contains the first word or phrase that was found lacking—in the example, the second sentence of the draft statement that includes the term ‘establish environments’—each time substituting one of the alternatives from the chart. In some cases, it may be necessary to modify the grammar for readability. When all four options have been read, the facilitator asks the team members to vote by a show of hands for the variation they like best (including the original wording). If there is a clear majority, that option is substituted; if not, the facilitator leads a discussion of the options and then asks for a re-vote--with the highest vote-getter being selected.

The process is repeated for the other words or phrases on the chart. The selected words or phrases are then substituted in the mission statement for the original wording.
Example:

**OUR MISSION:** We, at the Drug-Free Community Coalition, affirm that substance abuse is incompatible with a healthy community. We promote community-wide, social norms that reflect low/no tolerance for substance abuse and **open opportunities** throughout the community that support healthy choices and behaviors. Our coalition brings youth and adults to the table as equal partners in promoting and making possible a model community of which we are all proud. Youth are engaged fully in all aspects of community activity (planning, funding decision-making, fund seeking, implementation, etc.). They are receiving outstanding skill training and mentoring to fully tap their **emerging talents** as agents of change in the community. Their parents and other adults play key supportive roles to assist our youth in assuming leadership responsibilities for youth development efforts in the community.

Ongoing efforts are underway to locate and engage new community members with diverse talents in youth development activities. Complete and accurate information regarding the challenges and opportunities facing each community are available for deliberation and **to help set priorities.** Youth and adults work in teams to conduct environmental scans and other community information/resource gathering activities. Youth have independent opportunities to review and make suggestions to the community based on environmental scan and other data. Comprehensive approaches are being employed that span the full spectrum of **best practices in the field of prevention.** The evaluation function is integrated into all aspects of the community’s approach to youth development.

Regular celebration activities are held to recognize successes attributable to individuals and teams as well as community-wide gains. Frequent interaction with our partner community takes place to receive and offer feedback on respective community efforts. We routinely communicate with other Drug-Free Community Coalitions to share successes and lessons learned.

As a final activity, the facilitator or a volunteer reads the statement in full with the changes, asking group participants to note anything in the statement that they might find still jarring to the ear (e.g., **poor grammar or redundant phrases**). If any words or phrases are identified, the facilitator asks the group for suggestions for improvement. At this time, suggestions are also made for moving sentences around to add clarity or punch. These changes are made and the statement read one last time.
**Example:**

**OUR MISSION:** We, at the Drug-Free Community Coalition, affirm that substance abuse is incompatible with a healthy community. Our coalition brings youth and adults to the table as equal partners in promoting and making possible a model community of which we are all proud. Youth are engaged fully in all aspects of community activity. They receive outstanding skill training and mentoring to fully tap their emerging talents as agents of change. Ongoing efforts are underway to locate and enlist community members with diverse talents in youth development activities.

Comprehensive approaches are being employed that span the full spectrum of best practices in the field of prevention. Youth and adults work in teams to conduct environmental scans and other community information/resource gathering activities. Youth have independent opportunities to review and make suggestions to the community based on these environmental scans and other data. The evaluation function is integrated into all aspects of the community’s approach to youth development.

We hold regular celebration activities to recognize successes attributable to individuals and teams as well as community-wide gains. We interact frequently with our partner community to receive and offer feedback on our respective community efforts. We look forward to our meetings and communication with other Drug-Free Community Coalitions where we share successes and lessons learned. In sum, we promote community-wide, social norms that reflect low/no tolerance for substance abuse and open opportunities throughout the community that support healthy choices and behaviors.

This entire procedure for constructing the mission statement should take no more than two hours. As the statement is used, refinements in language might be suggested. So long as the spirit is not lost, these changes should be made by the organization.

**Involving Large Numbers of Stakeholders**

As noted above, I do not recommend working through this procedure with groups larger than 15 or so persons. It can be done, but more seems to be lost than is gained in terms of group dynamics and creative energy exchange. Where the business really needs buy-in and active participation from a much larger group of stakeholders, I suggest using a staged approach that mirrors the one just presented; however, that is accomplished using communications technology rather than at a live meeting of all participants.

In the first stage, participants are invited to be part of the group that will be composing the mission statement, receive a general description of the process that will be followed, and, as a first step, are requested to provide two responses to the prompt used in Step One.
This stage can be accomplished by telephone, mail, or--ideally--using e-mail. The facilitator compiles these responses and converts them to a draft mission statement.

In the second stage, roughly two weeks later, the participants each receive a copy of the draft statement and are asked to indicate and suggest alternative wording for any words or phrases they find to be jargon, offensive, confusing, or overly technical. Again, telephone, mail, or ideally e-mail is used for this interaction. The facilitator reviews these suggestions and integrates them into the statement. The draft final version is shared with a review team designated by the business and revisions are made, as deemed appropriate.

In the final stage, again roughly two weeks later, the participants receive copies of the draft final version of the mission statement. They are thanked for their participation in the process and asked to suggest any final changes they feel are still warranted. The review team considers these suggestions and makes any final changes.
TOOL 3. Establishing the Outcome Challenges

“For a Native American, a healing is a spiritual journey. As most people intuitively know (except maybe doctors, who are trained to disbelieve the idea), what happens to the body reflects what is happening in the mind and spirit. People can get well. But before a person can do so, he or she must often undergo a transformation—of lifestyle, emotions, and spirit—besides making the necessary shift in the physical body.”
Lewis Mehl-Madrona, M.D.

There has been a dramatic shift in recent years in the demands placed on human-serving initiatives to prove their worth. Previously, these initiatives were asked by stakeholders to simply provide process measures to justify themselves. Typically these measures reflected numbers of services provided and events conducted; numbers of individuals reached, by gender, ethnicity, etc.; and degrees of consumer satisfaction with these services and events (usually rated along a poor-to-excellent or 1-to-5 scale). Today, most stakeholders insist that initiatives document and somehow quantify the sustained changes occurring in the lives of those they reach. They want evidence of the worth of the initiatives they support in outcome units and not in process terms.

This shift of focus away from process measures is laudable. Initiatives ought to be held accountable for their impacts on others and not simply for how busy they have recently been making these impacts possible. However, outcome measures per se may not offer the best evidence regarding initiative performance, particularly if that initiative engages in transformation-focused work.

With simple, single-service delivery systems, there is a finish line and a timetable for reaching it. Here, discrete outcome measures make sense as gauges of success. For transformation-focused work, in contrast, there are emerging opportunities that must be seized then-and-there or are lost. Thus, this work often entails making a difference or not at the very moment that an opportunity presents itself. The responsiveness of the initiative in seizing these opportunities, as well as the quality of exchange between the parties, are the true measures of initiative performance.

Turning attention toward these opportunisttic encounters may sound like a retreat to process measures. Actually it is a recognition that in moving from process to outcome measures we have inadvertently leaped right over the most fertile territory. For
accountability purposes, we most need to know more about how an initiative wears down the resistance of its clients, on the one hand, and supports and inspires them to act differently, on the other. To be an effective contributor to the types of change that most likely will lead to profound outcomes, the initiative needs to influence—in a positive sense—the willingness of its clients (and possibly others) to behave differently. As evidence of how well the initiative is achieving this end (actually more a ‘middle’ or ‘new beginning’ than an ‘end’), the focus needs to be on measures linked to successful encounters between the initiative and those others—wherever along the journey to outcomes these events may occur.

How then do we gauge the power of an initiative’s contribution when the intent is transformation and not simply service provision? I see one productive way. Within each individual, whether perceived consciously or not, is a striving to outdo and remake herself or himself. No one is a finished product. Each person is simultaneously the artist and the unfolding art product she or he is creating. Life serves as the studio within which the self-creation process occurs. Human service initiatives are there to help support this process for those requiring or interested in such help. They may remove roadblocks. They may build assets. They may provide encouragement or inspiration.

So consider the contribution (or, more likely, multiple contributions) within the context of each client’s self-creation journey. Has an initiative’s contribution got that client thinking and acting differently? Has the client’s journey taken a turn for the better? If the answer to either or both of these questions is in the affirmative, then there is no reason to doubt that the initiative has helped.

“In medical usage, ‘anecdotal evidence’ means ‘of no scientific value or importance.’ I take a different view of this material, and I am interested in why so many doctors have a hard time with it. I suppose the simplest answer is that doctors and scientists do not like to be made to look like fools, and they sense danger in endorsing products or techniques whose claimed effects may turn out to be false or unprovable by controlled experiments. But it is equally foolish to ignore testimonial evidence, because it may suggest directions for experimental inquiry, as well as provide clues to the nature of healing.”

Andrew Weil, M.D.

Let’s resist the temptation to measure exactly how much the initiative has contributed to any particular journey. Instead, let us overlay the transformation-focused journeys involving the initiative, one on top of the next, producing a pattern (the technical details for accomplishing this are explained in the next chapter). Each new journey added enriches the pattern, much like each piece of a holographic slide—while projecting a fuzzy
image of the whole if used alone--adds clarity to the emerging vision of the whole if combined with other pieces. At some point, there will be enough journeys in the mix to produce a very clear picture in the mind of the funding source and others of the impact domain of the initiative and of the specific ways it has worked within this domain to contribute to life changes in others. With this holographic picture, coupled with select benchmark measures and progress, stakeholders should have little difficulty in judging the worth of the initiative.

Outcome Challenges

In place of discrete outcome measures, I strongly urge the use of outcome challenge statements. These describe, in brief but inspiring terms, the intended impacts of an initiative on those it intends to support in a change process. To illustrate, here are the five outcome challenge statements crafted by the Texas Fragile Families Initiative. This ground-breaking initiative, launched in early 2000, focuses on young, unmarried fathers and on others who interface with the fathers.

Outcome Challenge: We intend to see **young, low-income, fathers, most of whom are unmarried, and all of whom are in fragile family situations** who possess the know-how and means and who are assuming responsibility for and willingly and skillfully contributing to the financial, emotional, spiritual, and developmental well-being of their children as part of a parenting team.

Outcome Challenge: We intend to see **mothers and/or other members of the parenting team** who appreciate the positive, transformative role that their children’s father can play in their children’s lives and who are offering the encouragement, cooperation, and good will needed for the father-child relationship to strengthen and flourish.

Outcome Challenge: We intend to see **child support enforcement and other social service systems** who applaud and actively and constructively support efforts of young, low-income, non-custodial fathers to provide for their children and interact cooperatively with their children’s mothers (and/or other members of the parenting team).

Outcome Challenge: We intend to see **Texas Fragile Families (TFF) Initiative grantees** who, with skill and insight, are building on their individual and collective experiences to provide ever-enhancing, quality, multi-faceted programming while engaging thoughtfully and empathetically with fathers, mothers, parenting team members, and other program partners.
Outcome Challenge: We intend to see private and public funders, policy makers, and community-based organizations throughout Texas who grasp the importance and are drawing on the lessons learned through the TFF Initiative to develop and implement local programs to support young fathers in meeting the emotional and material needs of their children.

This set of outcome challenges, as a group, captures much of the same content and spirit as does the Initiative’s vision statement. However, here we focus in on specific categories of participants and on the unique self-creation journeys that the initiative would like to see them each travel. The primary clients for the initiative are young fathers. If the initiative is successful, a growing number of these young men will possess the means and be acting in ways that benefit their children, the mothers of their children, and themselves. For this success to be realized, others must also be on a path of self-creativity and concomitant growth.

The designers of the initiative are clear regarding who are these other boundary partners and how they too must change to keep pace with, rather than hinder, the transformations of the young fathers. While the direction of these changes is stated up front, the specific contributions of the initiative to these changes are left open. Over the next several years, as the initiative evolves through multi-site programs across the state, journeys will be tracked systematically. Collectively these journeys will provide a similarly evolving picture of the Texas ‘socialscape’ as it is being influenced and re-shaped through the initiative.

Of key importance, these outcome challenges are not meant to be measured. They are meant to inspire, but more so to serve as idealized reference markers for the initiative’s participants and as foci for accountability. It will be legitimate and worthwhile for the funding source (in this instance, a local foundation supporting a grantee in its region) to inquire, “One of your outcome challenges relates to social service systems who are taking more supportive and enlightened approaches to young fathers. What journeys can you share of contributions you have made in this regard?” Or, “How many of the young fathers in your program have made significant progress toward the ideal situation described in your outcome challenge statement?” Clearly it will be in the best interest of each grantee, as well as of the initiative overall, for their respective managers and staff to anticipate such inquiries and ask themselves these very same questions well before they are asked of them. This self-questioning will keep them alert to potential shortfalls and lead to corrective actions far more rapidly than might otherwise be the case. Most important, building the journey database will allow program staffs to capture and share their successes as these occur, inspiring them and others to do more and better.

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Boundary Partners

In addition to primary clients, an initiative intent on contributing to fundamental change must work with and attempt to influence others. I refer to these others as “boundary partners” of the initiative. Boundary partners include not only the primary beneficiaries of an initiative (in the above example, the young fathers), but also side partners, catalysts and overseers, and other system gatekeepers. Side partners refer to other initiatives, agencies, or human resources that the initiative draws upon to support the needs and further the opportunities afforded its clients. In the above example, child support enforcement and other social service systems represent side partners. Catalysts and overseers refer to funding sources and advisory groups, as well as regulatory or oversight bodies. System gatekeepers refer to any individual, group, or organization that wields the power to make it easier or more difficult for the initiative to interact with its primary clients and other boundary partners.

What is important here is to have the initiative designers look beyond their primary client group and consider the larger systems context within which they operate and can make a difference. Transformation does not happen in a vacuum. It is rare for one component of a system (e.g., young fathers in the initiative) to change dramatically while the remaining components remain unmoved. These other components (e.g., members of the parenting team or government agencies) are likely to protest or place roadblocks to slow down the change process of this maverick component so that they are not forced to change faster than they choose, or at all. A more enlightened position, and the one promoted through Outcome Engineering, is to project a win-win model for the entire system from the outset. The set of outcome challenges is that model.

The boundary partner categories are not meant to be mutually exclusive. They are just one convenient way to get an initiative to consider the ‘socialscape’ in which it operates or will operate and identify all those key parties that it can and should attempt to influence. In the above example, the mothers and other members of the parenting team could be viewed either as side partners or as systems gatekeepers. The young fathers are the primary beneficiaries of the individual grantees, while the grantees are themselves the primary beneficiaries of the initiative overall.

The children of these young fathers are actually a special case here in the sense that they represent the ultimate raison d’être for the initiative and yet are not direct recipients of initiative services. Hence they are not considered boundary partners. While it would be a temptation to want to measure how they are benefitting from the initiative, this would be a mistake in the sense of holding the initiative accountable for what is outside its direct
sphere of influence. If, some time in the future, the key stakeholders of the initiative feel that it is critical to gauge child impacts, then additional funding would need to be made available to permit the delivery of child-related services. However, even with the current model, the impact on the children is not being ignored. This impact is being captured anecdotally but richly through the journeys being mapped of the various boundary partners whom the initiative does influence directly.

**Composing the Outcome Challenge Statements**

A two-step procedure is used to construct the set of statements. The first step leads to the identification of the boundary partner types for which statements will be composed. The second step is the development of these statements.

As was the case in composing the vision and mission statements, a skilled facilitator working with a computer and projection system guides the procedure. The facilitator asks those participating to list all the partners that members can think of whom the initiative does or might interact with *directly* in carrying out its work. Excluded are those whom the initiative does not reach directly. A simple format is used to help organize the list. The partners are listed by type (e.g., young fathers) and not by specific individual names. A possible exception would be an individual (say, a prominent school board member) who is a key system gatekeeper and instrumental in the success of the initiative in her or his own right. Each type is listed only once, even if it could fit into more than one of the four boundary partner categories.

**Identification of Boundary Partners**

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<th>WHO ARE THE BOUNDARY PARTNERS FOR THE INITIATIVE?</th>
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<td>PRIMARY BENEFICIARIES</td>
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<td>CATALYSTS AND OVERSEERS</td>
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<tr>
<td>SYSTEM GATEKEEPERS</td>
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</table>

The group then selects the partner types whose behaviors and practices the initiative has the most opportunity to influence. At this point, particularly if the list is long, partner types should be combined into broader clusters. For example, with the Texas Fragile Families
Initiative, private and public funding sources were combined into one cluster along with policy makers and community-based organizations. The prevailing feeling of the group making this decision was that the stages of change for each type in the cluster were similar if not identical; and, further, that they collectively represented one form of system-level change that the initiative was interested in promoting and for which it is willing to be held accountable.

The suggested size of the completed list is six or fewer types or clusters of boundary partners. In most cases, the list will likely be narrowed down to two or three boundary partner types. Recall that these are types of individuals or organizations that the initiative will influence enough to warrant a journey being mapped about its role in that change process.

The second step in the procedure is to compose an outcome challenge statement for each boundary partner type on the final list. A process that I have found works well for this is to assign the task of composing any one statement to two or more individuals (depending on total group size and the number of statements to be composed). The individuals are first asked to work alone to construct the statement, then to meet together to compare and synthesize their ideas. Five minutes is allocated for the individual work and ten minutes more for the synthesizing activity. To assist the group, the facilitator offers this prompt:

Begin the statement with the format: ‘We intend to see {boundary partner type} who...’. Complete the statement with a three-part progression that includes what changes you would expect to see, like to see, and love to see take place over the lifetime of the project and perhaps beyond. For example, ‘We intend to see children who come to school prepared and eager to learn, who explore and master basic skill sets and special interest areas of their choosing, and who move on to advanced learning with pride in their accomplishments and expectations of greater future success.’

The completed statements reflecting the synthesis are handed to the facilitator who types these into the computer (using any convenient word processing package). When all statements have been keyed in, the entire group reviews them one by one. Suggestions are made for word changes or for more significant revisions. As with the vision and mission statements, one role of the facilitator is to encourage the use of language that evokes passion. A second role is to help the group achieve consensus. A third role is to encourage language that suggests action rather than passivity.
Outcome Engineering Toolbox

**Poor**: Teachers who draw on their experience to ...
**Better**: Teachers who draw on their rich and varied experiences to ...
**Still Better**: Teachers who routinely draw on their rich and varied experiences to...

**Poor**: Administrators who are aware of the need for ...
**Better**: Administrators who are motivated to take action based on ...
**Still Better**: Administrators who take effective and creative action to ...

The final set of outcome challenges should make it clear what the initiative is intending to accomplish and the difference it hopes to make in the lives of those it touches. Thereafter, these declarations can and should be used creatively to inform and enliven orientation and training sessions conducted by the initiative. They also can enrich proposals for funding if used with caution. Most current reviewers have been conditioned to look for measurable outcomes—however uninspiring these may be. Unless they are familiar with the arguments and possibilities presented in this document, they will need to be walked though the logic underlying the use of challenges rather than measures. My sense is that the time is ripe for conversions of reviewers—and the funding sources they represent—to this more spirited approach to accountability.
6. TOOL 4. Mapping the Journeys

“History never looks like history when you are living through it. It looks confusing and messy, and always feels uncomfortable.”
John Gardner

Initiatives engaged in transformation work are poorly equipped to tell their respective stories in detail. Consequently, hardly anyone—neither insiders nor outsiders—knows exactly what they do to make dramatic changes in others possible. There are three good reasons for this. First, these initiatives don’t yet recognize how much they are losing by not telling their stories well. They are too busy adding to them. When pressed to explain or justify their work, they are prone to throw together some often-repeated catch phrases and a couple of anecdotes featuring successful clients and figure that will do. After all, they think, their stories are not that important, what counts is helping others.

Second, unless it is a one-person dominated operation, no single person has all the key information needed to capture an initiative’s story data base in detail. More often than not, that information is spread all over the office and beyond, or buried in the memories of the leadership, staff, clients, and other boundary partners. These information holders frequently meet both formally and informally to discuss issues, tackle problems, consider opportunities, and celebrate successes; rarely do they meet to document, synthesize, and learn from their collective experience.

Third, a useful, friendly, efficient, and self-administered methodology for capturing and sharing the detailed stories of an initiative engaged in transformative work has not existed until now. The closest approximation to such a method has been the use of case notes. However, these notes tend to be more useful for the note taker than for anyone else and are not meant to be aggregated across clients. Hence, they do not combine easily, if at all, to provide a total picture. Moreover, they fail to meet the important challenge posed by the qualitative researcher, Charles Ragin, of “trying to make sense of the diversity across cases in a way that unites similarities and differences in a single, coherent framework.”

I spent much of the decade of the nineties trying to devise a useful and informative way for an initiative to document what it does as a running and evolving account so maximum learning would occur through the documentation process. I assumed that this account was actually a composite of its best client stories. Hence, my focus was on these stories and specifically on the top 10-15 stories that the initiative had to share, namely those that
highlighted its most creative and impact-producing work with primary beneficiaries. I posited that a collection of these success stories would capture what the initiative did in ways that numbers alone could not—particularly if these stories could be constructed using a sound and replicable protocol.

My book, *Success Stories As Hard Data*, presented such a protocol. Twenty-eight conventions were suggested for use in reconstructing a story. The stories were mapped as a chronological sequence of transactions between a change agent (typically, but not always, program staff) and a beneficiary (typically, but not always, a program client). A mapped story, for example, might have this form:

- Map 1. Program staff helped client X.
- Map 2. Program staff referred client X to provider P.
- Map 3. Provider P helped client X.
- Map 5. Program staff helped client X again.
- Map 6. Client X helped himself again, reaching a milestone.
- Map 7. Client X helped a peer.

The mapping conventions insured that story tellers, working independently with the same information, would relate the stories in near identical manner. Further, each transaction so mapped was coded and scored. The conventions helped insure that independent coders would assign the same codes and produce the identical score when analyzing a transaction. Unfortunately, two glaring problems with the story mapping method (called Results Mapping) became more apparent to me as it gained popularity and widespread usage. First, the conventions forced program staff and others to relate their work through a structure that was every bit as artificial as the use of dry statistics. The method generated highly structured, mapped stories but not passionate stories. In pursuit of replicable methodology, the art and spirit of story telling had been sacrificed.

Second, while the collection of mapped and scored stories produced through Results Mapping pulled together information that previously was unshared and often buried, the resulting story database was not exceptionally valuable as a guide to future actions. Mappers could draw on these data to point out where the initiative might employ volunteers more productively or promote client self-efficacy rather than dependence on the initiative. But, in most cases, they could have drawn the same conclusions and offered similar advice based on focused discussions with key staff. In short, the stories did not promote new learning nor provocative feedback. And this was the primary intent of Results Mapping. What to do?
Early in 1999, I began a collaboration with the evaluation unit at Canada’s International Development Research Centre. My story mapping approach had not previously been applied to economic development which was the core focus of the Centre. In making the translation from health and social program stories to economic development stories, I found myself thinking differently. The image of the behaviors of people and systems unfolding through time at variable rates—and influencing other behaviors as they evolved and changed—replaced the more linear concept of a story with a beginning, middle, and end that I had been employing. This led me to the concept of mapping the overlapping stories of boundary partners.

That summer, the unit invited me to travel to Senegal and present my work as a two-week training-of-trainers event for staff at the West African Rural Foundation. Since my command of French was limited and my knowledge of Wolof non-existent, and since English was the participant’s third language, we decided to operate with side-by-side translation of my English-language presentation and comments into French. What a wonderful opportunity for me. Not only did I have a rare opportunity to train a very bright and appreciative group of African economists and sociologists, I had to draw on examples that made sense to them, pay close attention to the terms I used to avoid jargon and Americanisms, and wait and listen closely for mistranslations as my words were repeated in French. And I had two full weeks to make certain that my approach was understood and could be used effectively by my African colleagues. Through this process, the image of the behaviors of people and systems unfolding and perfecting over time gained in clarity. I realized that it was ‘heroic journey’ mapping, and not ‘success story’ mapping, that was needed to best capture the transformative work of an initiative—and not simply economic development programs, but all human-serving initiatives where the intent is transformation.
From Stories to Journeys

It took an additional two months for the full implications of this shift in imagery from stories to journeys to take hold in my mind and lead me to reshape the mapping methodology, the language employed to describe it, and the metrics used to capture progress. A final Aha! came not too long thereafter, when I realized that the skeletal structure of a journey—and particularly that of the heroic journey—was incredibly rich with possibilities as an organizing framework across which to relate the work of an initiative. With the new methodology, Journey Mapping, the description of the journey could be typed out by the mappers much as a news reporter might. They could use their own writing styles and even insert opinions and speculations. By mapping these narratives onto a standardized journey plot line, the science could still be there without forcing a structure on the story writing itself.

Building on the classic work of Joseph Campbell (presented in The Hero with a Thousand Faces), I accepted as axiomatic that there was a single master plot for all journeys. As Campbell explained:

> Whether the hero be ridiculous or sublime, Greek or barbarian, gentile or Jew, his journey varies little in essential plan. Popular tales represent the heroic action as physical; the higher religions show the deed to be moral; nevertheless, there will be found astonishingly little variation in the morphology of the adventure, the character roles involved, the victories gained. If one or another of the basic elements of the archetypal pattern is omitted from a given fairy tale, legend, ritual, or myth, it is found to be somehow or other implied—and the omission itself can speak volumes for the history and pathology of the example.

In short, an underlying, all-compelling pathway seems to define all heroic journeys. If someone or some agency deviates from this archetypal pathway, she, he, them, or it will inevitably be drawn back to the archetypal pattern. Journeys have differed and will continue to differ in the details, but not in the basic plot line.

Campbell described the plot in these terms:

Stage One. Departure

1. The Call to Adventure
2. Refusal of the Call
3. Supernatural Aid
4. The Crossing of the First Threshold
5. The Belly of the Whale

Stage Two. Initiation

6. The Road of Trials
7. The Meeting with the Goddess
8. Woman as the Temptress
9. Atonement with the Father
10. Apotheosis
11. The Ultimate Boon

Stage Three. Return

12. Refusal of the Return
13. The Magic Flight
14. Rescue from Without
15. The Crossing of the Return Threshold
16. Master of the Two Worlds
17. Freedom to Live

With regard to this plot line, I was attracted to Campbell’s division of the journey into three stages: the departure, the initiation, and the return. However, I recognized that the language Campbell used would not resonate well with my clients and those they serve. As alternative language, I settled on “contemplation and preparation,” “actions and successes,” and “the legacy” left behind for others. I also felt the need to rename and reshape the 17 steps in the heroic journey suggested by Campbell. For example, terms and concepts like “Whale’s belly,” “Woman as the Temptress,” “The Ultimate Boon,” and “The Magic Flight” were simply too abstract, religiously charged, or sexist to serve as keys for guiding journey mappers through their story-telling—at least for serving as guides for the type of mappers I currently, or would most likely continue to, work with.

I used this reshaping to devise a master journey plot that has 15 rather than 17 steps, organized in three sequential stages. To add further refinements and allow for more fine-grained tracking, each of the 15 levels includes three sub-levels (designated as a, ab, and abc). In brief, the “a” sub-level indicates entry to the new level; the “ab” sub-level suggests progress or deepening of experience at that level; and the “abc” sub-level denotes the completion of that level and readiness for further progress at advanced levels. The descriptions of the levels are written in the past tense.
## STAGE ONE. CONTEMPLATION AND PREPARATION

<table>
<thead>
<tr>
<th>Level 1. EXPOSURE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Heard about (1a), learned more (1ab), and fully understood (1abc) the opportunity.</td>
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</table>

<table>
<thead>
<tr>
<th>Level 2. ATTRACTION</th>
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<tbody>
<tr>
<td>Was attracted to the opportunity (2a=somewhat; 2ab=very; 2abc=ecstatic).</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Level 3. BARRIERS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Identified obstacles to participation (3a), considered options (3ab), and found way (3abc) to participate.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Level 4. COMMITMENT</th>
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</thead>
<tbody>
<tr>
<td>Declared willingness to participate (4a), met conditions (4ab), and scheduled start (4abc).</td>
</tr>
</tbody>
</table>

## STAGE TWO. ACTIONS AND SUCCESSES

<table>
<thead>
<tr>
<th>Level 5. EARLY SUCCESSES</th>
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<tbody>
<tr>
<td>Began participating (5a), could point to early successes in areas that made the journey attractive (5ab), and sustained or extended these successes (5abc).</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Level 6. EXPANDED SUCCESSES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Expanded level and types of involvement (6a), could point to successes (6ab), and sustained or extended these successes (6abc).</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Level 7. OBSTACLES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Confronted obstacles to full participation at either Levels 5 or 6 (7a), identified options (7ab), and applied these successfully (7abc).</td>
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</tbody>
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<table>
<thead>
<tr>
<th>Level 8. SYNTHESIS</th>
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<tbody>
<tr>
<td>Made major commitment to the journey with associated lifestyle shifts and new rounds of personal successes (8a, then later 8ab, then later 8abc as outcome challenge is realized).</td>
</tr>
<tr>
<td>Level 9. SOCIAL</td>
</tr>
<tr>
<td>----------------</td>
</tr>
<tr>
<td>Recruited or exposed others to the same opportunity (9a), supported them (9ab), and coached/advised them over a sustained period (9abc).</td>
</tr>
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<table>
<thead>
<tr>
<th>Level 10. ADVOCACY</th>
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</thead>
<tbody>
<tr>
<td>Became active as advocate for journey-related issues (10a), met successes as an advocate (10ab), and expanded or extended these successes (10abc).</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Level 11. IDENTITY CRISIS</th>
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<tbody>
<tr>
<td>Recognized journey-related experiences had fundamentally changed future life (11a), struggled with the implications (11ab), and moved boldly forward with fresh determination (11abc).</td>
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<table>
<thead>
<tr>
<th>Level 12. METAMORPHOSIS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reshaped personal image and values (12a), embarked on public or private crusade (12ab), and met new rounds of challenge and success (12abc) as champion of the journey.</td>
</tr>
</tbody>
</table>

**STAGE THREE. THE LEGACY**

<table>
<thead>
<tr>
<th>Level 13. MICRO LEGACY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Left enduring impact on those in immediate environs (13a=somewhat; 13ab=strong; 13abc=profound and life changing).</td>
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<table>
<thead>
<tr>
<th>Level 14. MACRO LEGACY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Left enduring impact beyond immediate environs (14a=somewhat; 14ab=strong; 14abc=profound and life changing).</td>
</tr>
</tbody>
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<table>
<thead>
<tr>
<th>Level 15. PERSONAL STORY</th>
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</thead>
<tbody>
<tr>
<td>Left detailed account of personal journey as an addition to human history (15a=local folklore; 15b=national hero(ine); 15abc=universal superhero(ine)).</td>
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</table>

The beginning of the heroic journey (Level 5) has a singular focus. There exists a specific issue area or opportunity that has attracted the hero(ine) to the journey. At this point, the journey is not yet ‘heroic’. It is transactional rather than transformative: the
program provides a service or opportunity and the hero(ine) receives the benefits. The move to Level 6 is indicated by a shift from singularity to multiplicity. The hero(ine)’s journey now includes receipt of multiple and varied services or participation in expanded and diverse opportunities. For example, what began as participation in an exercise class has progressed to weight lifting and jogging.

I will return to Level 7 in a moment.

Levels 8, 9, and 10 represent a further qualitative shift. Now the diverse elements that have been added to the hero(ine)’s life are synthesized within a new lifestyle—with personal (Level 8), social (Level 9), and political (Level 10) components. The exercising/weight lifting/jogging hero(ine) now is eating differently, waking up earlier, reading different materials, promoting different issues, and spending time with different folks than was the case when (s)he first began exercising. The outcome challenge has been realized.

I will return to Level 11 in a moment.

Level 12 completes the transformation. The hero(ine) is marching to a different drummer, guided by a different set of values and ideals. Her sense of self has radically changed. His understanding of his life’s purpose bears little resemblance to earlier musings. The caterpillar has spread its wings to find a butterfly within. Metamorphosis has occurred.

The journey includes three qualitatively different hurdles. At Level 3, the hero(ine) has to decide whether the journey is worth beginning. Are the costs and possible inconveniences or risks worth the projected rewards? At Level 7, the hero(ine) has come face-to-face with these or other concerns and must make life adjustments or more dramatic changes to continue on the journey. At Level 11, the obstacles are internal rather than external. “Do I like whom I have become and am becoming?” the hero(ine) asks. “Am I ready for a future that is nothing at all like the one to which I always thought my life was heading?”
The journey is represented graphically by filling in the markers reached. For example, in the figure on the right we see the first four maps of a journey. In map 1, the hero(ine) was briefly introduced to the journey (as a possibility) and reached 1a. By map 2, the hero(ine) had learned more (1ab and 1abc), got very excited (2a, 2ab, and 2abc), had most doubts addressed (3a and 3ab), and had made some preparations for beginning the journey (4a and 4ab). The actual journey began in map 3, as indicated by filling in all the still-empty markers in Stage 1 (i.e., levels 1 through 4) as well as 5a. The journey progressed in map 4 and some singular success was achieved (marked as 5ab).

The journey continued. We see in map 5 that the hero(ine) had achieved the initial status aimed for when the journey began (5abc). In map 6, the hero(ine) moved forward by expanding the scope of activity (6a) and, in so doing, encountered an obstacle to continuing to participate at this more intensive level (7a). During the same journey segment, the hero(ine) also provided some initial assistance to another individual (9a), perhaps encouraging that person to begin a similar journey. By map 7, successes had been achieved in multiple areas (6ab) and steps had been taken to remove the obstacle (7ab). By map 8, we see a qualitatively different status for the hero(ine). The journey had been integrated into her/his lifestyle (6abc and 8a). The obstacles preventing this jump in status have been overcome.

This same journey can be tracked numerically. For each of the first four levels, one point is added to the journey score for each marker reached. Thus, in map 1, the score is 1 (or one percent of the heroic journey completed). By map 2, the score has increased to 10. In map 3, the journey has crossed over to Stage Two. One bonus
point is added for crossing over to this stage (i.e., for actually beginning the journey). For the next three levels (i.e., levels 5 through 7), two points are added to the score for each marker reached. Therefore, the journey score associated with map 3 is 15. The scores for maps 4 and 5 are 17 and 19 respectively.

For the next three levels (i.e., levels 8 through 10), three points are added to the score for each marker reached. Therefore, map 6 earned 26 (12 points for Stage One, 1 for crossing over, 6 for level 5, 2 for sub-level 6a, 2 for sub-level 7a, and 3 for sub-level 9a). Using similar math, maps 7 and 8 earned 30 and 35 respectively.

Should this journey continue, and levels 11 and 12 be reached, four points would be added for each marker reached at either of these two levels. Finally, should there be a legacy left by the hero(ine), as indicated by markers at levels 13 through 15, each such marker would earn 2 additional points. The maximum possible score, should all 45 markers be reached, would be 100 (i.e., the heroic journey had been completed in full).

**Question.** What do the scores mean?

The journey score serves as a navigation tool, permitting a mapper or others to determine at a glance how far a hero(ine) has progressed and what adventures and challenges lay ahead. Unlike test scores, one does not have to score in the high 80s or low 90s to be judged a success. In fact, the use of 100 on test scores involves the waste of most of the numbers. If someone, for example, scores under 60, they have failed. Whether they received a 56 or a 43 or a 19 is typically of secondary or no importance. In contrast, under Journey Mapping, these scores speak volumes. A score of 19, for example, suggests that the hero(ine) has benefitted in some initial issue or opportunity area and is ready to move on to multiple activities. A score of 43 suggests that the hero(ine) has made a significant lifestyle shift and integrated multiple aspects of the journey into her or his routine. A score of 56 is quite impressive, suggesting the hero(ine) has both social and political contributions to her or his credit.

In combination, the scores generate running statistics on overall initiative performance (e.g., the scores for the 45 journeys range from a low of 19 to a high of 38, with a mean of 26). A listing of hero(ine)s with their respective journey scores, perhaps sorted by score and by gender or ethnicity, offers very rich and easily digested data regarding the performance of the initiative in terms of its ability to promote changes in different types of hero(ine)s.
Journey Mapping Elements and Conventions

The journey of a client or other boundary partner is documented through a series of journey segments (also called “maps”). I refer to this documentation process as “journey mapping” or “journal-keeping.” Each segment features one or more paragraphs in narrative format that describe advances or setbacks along the journey of that individual (or group, organization, system, or community). In addition to the narrative, six complementary fields of information are included with each map. The seven elements appear in a map in the following sequence:

1. The narrative description of what happened (written in the past tense).
2. The dates during which this segment of the journey occurred.
3. A capsule statement of what took place during this segment.
4. An identification by type of the key contributors in this segment.
5. The journey markers (sub-levels) reached or lost (e.g. 8ab).
6. Reflections on the progress of the journey and/or on new learning gained by the program through this story (optional).
7. Indications of which pre-set benchmarks or target milestones have been partly or fully reached.

Element One. Narrative

The narrative portion is where the details are provided regarding what occurred during this segment of the journey. The persons preparing these narratives can be as brief or wordy as they choose. In all cases, the narratives should be written in the past tense to describe events, activities, and results that have already occurred. The reflections (element six) can be used to anticipate future events or expectations.

The narrative for the first map of the journey is always used to provide useful background information on that individual, group, organization, or community and also to explain how that hero(ine) got to the program. For example, a narrative for the first map of Laura’s journey (compiled by a parish nursing program in Florida) reads as follows:

Laura, a married woman in her mid-60s, was a mother of four children. Her greatest concern was her 37-year old son and his 6-year old daughter because of his drinking problems. The son had visited her during Christmas and caused a big disturbance; he left in a huff and she had not interacted with him since. Laura contacted and had a visit with the pastor to discuss her family situation. The pastor referred Laura to
the parish nursing program. Laura contacted the parish nurse the same day and scheduled an appointment for later that week.

Subsequent maps and associated narratives expand on the unfolding journey. A new map is added whenever there is movement on the journey (including relapse or backward slipping). For the initial maps covering contemplation and preparation for the journey, a single map may cover journey progress extending over several levels (e.g., showing movement from Level 1a to, say, 4ab or even to 5ab). Later maps will generally cover slower progress, since these moves require more time and commitment on the part of the hero(ine). Here is an example of a narrative from an early map in a journey of a family attempting to address and overcome serious conflicts and dysfunctional behaviors. It demonstrates progress from 1ab through 4abc.

After reviewing the video provided by the program, the family members agreed that they would benefit from attending the three-day workshop. No family member expressed concerns nor offered resistance to the opportunity. Mom called the program and received the necessary application materials. The next day, the completed application was mailed back to the program. In preparation for the weekend, the family members each completed a personal assessment form provided by the program.

In general, the maps and associated narratives follow a sequence that answers these questions:

4 How did the hero(ine) learn about the journey and first come in contact with the program? [level 1]

4 What was done to increase the hero(ine)’s interest in the journey and address concerns? [levels 2 and 3]

4 What requirements or steps did the hero(ine) have to take before beginning the journey with the program? [levels 3 and 4]

4 What was the initial problem area or opportunity that attracted the hero(ine) to the journey and what services or support were provided by the program to address it? What success resulted? [level 5]

4 Did involvement in the journey intensify? If so, in what new activities did the hero(ine) engage and what successes followed? What role did the program play in these new areas of activity? [level 6]
What barriers or obstacles to advancing along the journey were confronted and how were these addressed? What role did the program play in helping the hero(ine) overcome these obstacles? [level 7]

Did the hero(ine) reshape her/his life to accommodate the journey and sustain the changes? Explain how. What role, if any, did the program play at this stage of the journey? [level 8]

Did the hero(ine) provide support or encouragement to others on their journeys? If so, describe what the hero(ine) did and for whom. [level 9]

What public or community role (e.g., advocacy) did the hero(ine) play regarding issues linked to the journey? Was the program involved in any of these activities? [level 10]

At advanced levels of the journey, did the hero(ine) have a self-identity crisis linked to the changes occurring? If so, how was this crisis addressed and what resulted? [level 11]

After overcoming the crisis or reaching an advanced mastery level, what further successes and challenges were experienced? [level 12]

What legacy has the hero(ine) left for others? [levels 13, 14, and 15]

Any single map may address one or several of these questions. Or, several journey segments may be needed to fully address any single question.

It is possible and even likely that the sequence will be different for different hero(ine)s served by the same program. For example, Client X might have encountered barriers to participation prior to intensification of the journey to level 6ab (e.g., competing time demands). In contrast, Client Y might have hit no obstacles at all on her way to 6ab, only to then be confronted with a challenge to continuation of her journey. Their respective journey maps would present each journey in the sequence in which it occurred, skipping and then returning to earlier levels and journey markers if appropriate.

Client X: 5a>5ab>7a>7ab>7abc>6a>6ab>5abc>...

Client Y: 5a>5ab>5abc>6a>6ab>7a>...
It is also possible that certain levels of the journey are not encountered at all. For example, Client Z might not have made a social or political contribution (level 9 or 10) but did have an existential crisis (level 11) that needed to be addressed. In such cases, the missing levels would be ignored and the associated journey markers left blank.

Client Z: 8a>8b>8c>11a>11b>11c>...

There are conventions for filling in markers that did not occur once the hero(ine) has progressed well beyond them. For example, all the empty markers in Stage One are filled in when level 5a is reached. These conventions are presented later in the discussion.

Element Two. From and To Dates

Each journey segment includes an indication of the time period covered. Both the “From Date” and the “To Date” include the month and year (e.g., March 2000), but typically not the specific day or days. Particularly in Stage One of the journey, consecutive segments might occur within days or even hours of each other. In such cases, the “from” and “to” dates may be the same. In other cases, many months might go by before there is reason to add a new segment to the journey. In Journey Mapping, there is no need to account for every month. Only periods where there is movement on the journey are captured through maps.

It is also common for there to be overlapping dates from one map to the next. This will occur when two different sets of activities and consequences are taking place around the same period of time. For example, the hero(ine) might have been engaged in group therapy between April 1999 and December 1999, while also taking yoga classes between June and November of that same year.

Element Three. Brief Description

Each map segment includes a short summary of what happened during this segment of the journey. Narrative accounts (element three) sometimes will run for several paragraphs. Here, the same material is presented in 40 words or less. The function of the brief descriptions is to permit others to quickly scan the maps and get a general sense of the overall journey before deciding which maps to read in full.

Four examples of these capsule statements are presented below. These were extracted from the journey of a Pennsylvania agency that provides services and support to permit
persons with disabilities to enjoy independent living. Throughout its evolution, the agency was assisted by a hospital-based, community-directed initiative aimed at catalyzing changes of this type and magnitude throughout its service area. The journey was mapped by staff from this initiative as part of its documentation and self-assessment of community impact contribution. The full journey consisted of 23 maps, covering a four-year period.

Segment 8. The agency attended several learning community meetings sponsored by the program over a nine-month period leading to its involvement in two coalitions.

Segment 11. The evaluation skills gained at the training conducted by program staff were immediately applied within the agency’s consumer tracking system.

Segment 13. The agency moved forward with enthusiasm in introducing a time dollar initiative to engage its consumers and permit them to build on each others talents and resources (as one of 17 agencies in the community that engaged in similar initiatives).

Segment 18. Activists from the agency engaged in successful efforts that resulted in a chair lift at a major department store and attention to accessibility issues in communities of faith and other settings.

As with the narratives, these brief descriptions are written in the past tense to describe events, activities, or results that have occurred. While lacking in details, it is important that these capsule presentations can stand alone and provide useful information regarding both the hero(ine) and the initiative.

**Element Four. Key Contributors**

It may be interesting for the program staff, sponsors, or others to gain a sense for how effectively the initiative is making use of volunteers or other community resources to support hero(ine)s on their respective journeys. Under Journey Mapping, this is accomplished by having the mapper select the key agents of change associated with each journey segment. The default choices for these agents are (a) paid staff of the initiative, (b) volunteer staff of the initiative, (c) paid boundary partners (e.g., staff of other agencies), (d) volunteer boundary partners, (e) the hero(ine), and (f) some catalytic event—rather than individual(s)—that was a major factor in the progress of the journey, for better or worse. At least one, but possibly more than one type of contributor might be associated with the journey segment being mapped.

This information is used as input to analysis of the initiative’s journey data base. The initiative can determine, for example, the percent of the journeys it has mapped that
involve the use of volunteer staff as agents of change. It can gauge the extent of its working relationship with its boundary partners and particularly those side partners who offer their services on a volunteer basis. I refer to this use of side partners as “networking” and the use of volunteer side partners as “village building.” More detailed analysis can help reveal the levels at which volunteers are used and used effectively (e.g., as determined by what happened next in the journey). The number and percent of journeys that involve catalytic events can also be computed to earn a sense of the extent to which hero(ine) outcomes have been influenced—for better or for worse—by outside forces beyond the control of the initiative or the hero(ine).

**Element Five. New Journey Markers Reached**

For each new map added to the journey, the mapper indicates which new journey markers (i.e., sub-levels) have been reached in this segment of the journey (or, in the case of a relapse, which markers have been removed). There may be a need for judgement calls in determining whether or not a marker has been reached at a particular point in a journey, especially at the start of the journey. However, the definitions of the markers are sufficiently clear to promote amazing consistency across mappers making these decisions independently for the same journey and with the same information.

Journey progress should be viewed holistically. Each marker represents a new status for the hero(ine) and not simply some outcome objective that was achieved (although it can be interpreted that way). The journey represents a movement from status to status, rather than from achievement to achievement.

To illustrate this last point, consider Tom’s journey below. As we can see, Tom had learned enough about the journey (1ab) to be slightly interested (2a). However, he had several concerns or one serious concern (3ab) that had to be resolved before he could move forward. This was his status with regard to the journey. Many months later, we see that his status had shifted. He had begun the journey (Stage One was completed), enjoyed some singular success (5abc), and extended the journey with associated multiple successes (6abc). At this point, he was dealing with some issue or issues that might prevent his continuation on the journey at the current level of intensity (7ab). He also had made some social contribution (9ab), perhaps by helping recruit and support a peer on his journey. His status is represented by the total set of filled journey markers, not simply by the single marker that is most advanced (in this case, 9ab).
Certain conventions are followed in filling in these journey markers to deal with journeys where levels or sub-levels are skipped over. These are:

**Convention 1.** When 5a is reached, fill in all the empty markers in Stage One (i.e., the first 12 journey markers). The reason for this is clear. The journey has begun, so contemplation and preparation are over.

**Convention 2.** When 8a is reached, fill in all the empty markers at levels 5, 6, and 7. By level 8, synthesis has begun. Hence, the hero(ine) has moved beyond singular and multiple levels of participation, as well as the obstacles to such participation.

**Convention 3.** When 12a is reached, fill in all the empty markers at lower levels. The hero(ine) has reached the mastery level and will almost certainly have dealt successfully with (or transcended) crises, integrated the journey into her or his life, and reached out to support and encourage others.

As the heroic journey proceeds, it is possible for the hero(ine) to encounter secondary setbacks that slow down or temporarily stop forward progress of the overall journey. This is different from a major relapse which might bring the journey back to levels 5 or 6, from where the hero(ine) will have to start building forward again. In the former case, journey markers are not removed. In the latter case, they are. To handle minor setbacks, narrative accounts covering these events are added to the journey. However, they are not scored and no markers are added or deleted from the journey graphic. These are viewed as a subplot to the main journey.

Five of the journey markers have been selected as surrogates for short and longer term progress and success. They are 5ab, 6ab, 8ab, 9ab, and 10ab. A hero(ine) reaching
5ab has achieved some immediate success. A hero(ine) reaching 6ab has achieved multiple, intermediate-level successes. By 8ab, lifestyle changes of more enduring nature have occurred. When the journey reaches 9ab, the hero(ine) has made a social contribution. Finally, at 10ab, the hero(ine) has engaged in advocacy activity in support of peers and others. Running counts can be maintained of the number of hero(ine)s reaching each of these levels. Sub-counts can also be maintained for sub-populations based on selected traits being tracked (e.g., sub-counts by gender, ethnicity, age, community role, type of agency).

Counting progress this way holds true to the spirit of outcome measurement without artificially locking in a program to pre-selected and frequently arbitrary outcome targets. A program using Journey Mapping can prove its worth by showing in vivid terms how it has moved its clients and others forward according to their unique needs, circumstances, and possibilities. Most important, it can demonstrate how successful it has been in fostering lifestyle or work-style shifts in those with whom it has engaged (as evidenced by their journeys reaching 8ab or beyond).

**Element Six. Reflections**

As an optional entry, each mapped journey segment provides an opportunity for the mapper to share reflections with others. Completing this information field affords a wonderful opportunity for mappers to sit back and re-assess the case as well as to share insights with others who might later review the journey and attempt to learn from it.

**Element Seven. Target Milestones Reached.**

Many initiatives are challenged to show that specific, measurable results are being reached. Journey Mapping provides a provision for satisfying this requirement. In addition to the five success markers discussed above, I also encourage initiatives to name and track up to nine specific milestone targets for each partner type. These are designated as expect-to-see, like-to-see, and love-to-see milestones (with up to three milestones in each of these three categories). As their labels imply, the expect-to-see milestones ought to be reached by nearly all, if not all, hero(ine)s; the like-to-see milestones ought to be reached by a goodly number of hero(ine)s; while the love-to-see milestones represent rarer achievements for a limited number of hero(ine)s.

To illustrate, a hospital-based initiative in Lehigh Valley, Pennsylvania that engages non-profit agencies in the Valley in health-promoting efforts uses these nine milestones to track these agencies (in addition to mapping and scoring their journeys):
Expect-to-See Milestone Targets:

1. Submitted a proposal to the hospital for a new health-related project
2. Completed the proposed project
3. Measured the success of the project

Like-to-See Milestone Targets:

4. Joined at least one of the collaboratives sponsored by the hospital
5. Partnered with at least one other collaborative member on a new project
6. Took leadership in moving the collaborative forward

Love-to-See Milestone Targets:

7. Made systemic changes in their organization reflecting project experiences
8. Promoted some whole-health issue in the Valley
9. Promoted the collaborative model outside the Valley

This milestone tracking feature is integrated within the journey mapping process. In addition to indicating success markers reached, the mapper also notes milestone targets reached. This additional step takes seconds to accomplish and permits the mapper, initiative, and stakeholders to observe and learn how and when milestones of interest are reached. When combined, this 1-2 punch offers a means for tracking progress that is both unique and often insightful.
Question. Who does the mapping?

When I initially conceived of Journey Mapping, I anticipated that staff from the initiative would be mapping journeys for those clients and others with whom they had extensive relationships and knew their journeys intimately. More recently, I have been working with initiatives that preferred to have clients map their own journeys and were in position to encourage and support this. Rather than call it “journey mapping,” they refer to this as “journal-keeping.”

Question. In these cases where clients keep journals, should they only do the narrative portions and let the initiative staff fill in the journey markers and target milestones reached?

This is a possibility. However, there is real value in helping clients to see that they are on heroic journeys and to gauge their own progress over time. It is also valuable for clients to know which target milestones the initiative views as important and to engage them in determining if and when these have been reached.

Summary Journals

Detailed Journey Mapping might require upwards of five to ten minutes per entry. Typically such entries are done monthly. This level of commitment to mapping might work well for some initiatives, but be seen by others as an unacceptable amount of time away from working directly with clients. For the latter, I suggest the use of summary journals for all or a large percentage of hero(ine)s being mapped.

These summary journals are limited to one map per client that is periodically updated. The narrative portion of the map consists of a few words or phrases that very briefly describe key activities and accomplishments. The “from” date always remains the same, while the “to” date is revised with each update. The brief description simply reads “summary only” or includes very brief text. With each update, new journey markers reached are indicted as are the target milestones achieved.

An update of a summary journal takes less than one minute to complete. Therefore, if an initiative has say 100 clients and staff are doing the mapping, they might select 10 clients to map through detailed journals and capture data for the remaining 90 clients through summary journals. Should the clients be keeping their own journals, then detailed journals are recommended for all.
Activity Tracking

Even when initiatives are engaged in transformation work, a significant portion of their activities involve short-term activities reaching large numbers of individuals at the same time. Presentations at high school assemblies, blood pressure screening, mass mailouts, appearances on radio or television, articles in newspapers, and distribution of free bicycle helmets are examples of such activities.

For Journey Mapping purposes, these activities or events can be interpreted as short-lived journeys reaching multiple hero(ine)s and culminating at best at level 4. For initiatives interested in tracking these activities, I suggest the use of a standard database that might have the following data elements:

- Activity Identification Code
- Date(s)
- Brief Description
- Numbers Reached
- Rating of Information Provided
- Rating of Entertainment/Motivational Level
- Rating of Service/Skill Delivery Impact
- Rating of Follow-up Activity
- Evidence of Success

The four ratings would use three-point scales reflecting modest, medium, and high degrees of engagement with participants.
7. TOOL 5. Re-designing the Delivery System

“People don’t need to be geniuses or even extraordinarily talented to develop their work. The requirements are initiative and resourcefulness—qualities abundant in the human race when they aren’t discouraged or suppressed. People have an inborn capacity to tinker and contrive. If we ever stop tinkering to correct and correct and correct what we do, then we’ll bring the world to ruin.”

Jane Jacobs

“Tiny is the proportion of stakeholders who believe that their imagination is a significant resource that they can bring to their workplace.”

Charles Elliott

My approach to initiative accountability is different from most. Through use of the tools of Outcome Engineering, initiatives are afforded an opportunity to focus on and make visible the artistry of their work. Any truly artistic process is infused with inspiration. It begins with inspiration, is guided by that same inspiration (sometimes referred to as a muse), and is successful to the degree that the artist is delighted with and others become inspired by the creative output. Through inspiration, we experience, appreciate, and earn a deeper understanding for where life has and is taking us as we lead from the heart, deepen our relationships, exhibit more integrity in thought and deed, share the best of what we have to offer, and succumb to the spirit of creation.

To the extent to which inspiration is absent or faltering in the work of an initiative, Outcome Engineering is also a practical methodology for intentionally infusing inspiration within its work. To reiterate: We begin by using Tool 1 to compose a vision statement describing the type of elevated world, community, or system that the initiative and others would choose for themselves—a vision that is hopeful, fair, decent, thoughtful, generous, and worth pursuing. We then turn to the initiative itself and use Tool 2 to compose for it a mission statement. That statement begins (explicitly or implicitly), “In support of our vision...” In it, the initiative make no claims to being miracle workers. It does not promise to bring the vision to life alone. However, the initiative does step forward and declare its intentions to be a vision builder in partnership with those who have or might join it.

As a builder of vision, the initiative commits to transforming itself as well as those with whom it spends quality time, resources, and creative energy. “Who are these boundary
partners?" we ask, using Tool 3. “And what transformation (outcome) challenge does the initiative seek for each of these partners?” These challenges are stated as work style or life style shifts that the initiative intends to promote and support (i.e., Level-8 attainments along the respective journeys of its partners). The initiative then goes about its business, promoting and supporting these journeys wherever it is invited to play its part. As feedback, the initiative employs Tool 4 to map its best work to learn from it, to inspire its staff to do more and better, and to demonstrate to others what is possible.

The ultimate measures of the degree of initiative success with any of its boundary partners are (a) the number of specific partners who have begun at level five of their respective journeys and progressed to level eight or beyond and/or (b) the number of these partners who have achieved like-to-see and love-to-see targets. When these levels and targets are reached by partners, the initiative staff and others cannot help but be touched by the power of the transformations that have occurred. The staff, of course, cannot and must not claim credit for these transformations. However, they can enjoy the results while realizing that they were there when needed to remove obstacles, provide resources, point the way, and cheer for and with their partners along their journeys.

**When-If Problem Solving**

From time to time, the initiative needs to look beyond its current levels of success and imagine these in more abundance. By doing so, it is looking through imagination at its mission more fully realized. I call this the “when-if” position and I call exercises aimed at moving closer to that position “when-if problem solving.”

All these exercises have two parts. In the first part, the initiative team imagines different ways of reaching the when-if position and considers what got them there. In the second part, they come back to their current position and, with a heightened sense of what’s possible, they devise some action item or items to get them moving toward the when-if position.
Here is one such exercise:

**Exercise One (Technology Maximization).** The initiative has been able to secure the latest and greatest technology available for use in supporting more partners along their journeys. As a consequence, many more partners are reaching level eight and hitting those love-to-see markers. Which technology are we tapping? Why is it working?

Now the reality is that we don’t have access to this technology yet—or may be ever. But let’s start moving in this direction, being creative as we go and making use of what we can get our hands on. And remember, whatever we choose to do, our aim always is to empower our partners to do for themselves and others and not to do it for them. So what are we going to start doing differently?

To illustrate, the Connecticut Assets Network aims to tap and unleash the potentials of youth and others in support of their own growth as well as the health and vitality of the communities in Connecticut in which they live and work. Imagine how many more individuals and groups the Network could impact were it to have a holodeck (similar to the one made famous on Star Trek) where its partners could select talent or skill areas and try them out—one by one or in combinations—through fictional but lived experiences. Youth would be lining up around the block to gain access to this sci-fi wonderland. They would leave the holodeck wanting more such experiences in this fictional realm but sooner rather than later in their real worlds.

The low-budget Network is not likely to have access to holodeck technology for some time (although I can imagine the time when it might be available and affordable). However, as action items, the Network can create an inventory of new learning experiences, find community resource persons (e.g., welders, bowlers, fashion designers, interior decorators, and hikers) willing to make specific experiences available to youth, and match youth up with these resource persons. They can challenge these resource persons to lead from the heart.

Here are five more exercises of this type. An organization or initiative can randomly pick from them whenever there is a sense that some fresh thinking is needed to spark new inspiration and action and reach more partners at heightened levels.
Exercise Two (Expanded Volume). The initiative has been able to increase the number of partners it is serving tenfold and most of these partners are reaching to level eight and beyond. Moreover, many of these clients being supported are those who were formerly considered to be the most difficult-to-serve. How have we been able to achieve this and in only three years?

Now the reality is that this volume increase is probably beyond our reach. But let’s start moving in this direction, being creative as we go and aim for at least a threefold increase. And remember, whatever we choose to do, our aim always is to empower our partners to do for themselves and others and not to do it for them. So what are we going to start doing differently?

Exercise Three (Success Symbol). The initiative has enjoyed success beyond anyone’s expectations. Given the nature of the business and the types of successes achieved, what type of symbol might be created to capture what has occurred as a tribute to these achievements?

Where might the symbol be placed to inspire the staff and others? Think of at least three uniquely different locations or applications for the symbol. Implement at least one of these as soon as possible.
Exercise Four (If Money Were No Object). The initiative has been able to secure as much money as it needs for use in supporting more partners along their journeys. As a consequence, many more partners are reaching level eight and hitting those love-to-see markers. How is the money being spent? Why is it working?

Now the reality is that we don’t have access to this level of funding yet—or may be ever. But let’s start moving in this direction, being creative as we go and making use of what we can get our hands on. And remember, whatever we choose to do, our aim always is to empower our partners to do for themselves and others and not to do it for them. So what are we going to start doing differently?

Exercise Five (Volunteers in Abundance). The initiative has been able to mobilize large numbers of talented and dedicated volunteers in supporting more partners along their journeys. As a consequence, many more partners are reaching level eight and hitting those love-to-see markers. How are these volunteers being used? Why is it working?

Now the reality is that we don’t have access to this level and quality of volunteerism yet. But let’s start moving in this direction, being creative as we go in our use of volunteers. And remember, whatever we choose to do, our aim always is to empower our partners to do for themselves and others and not to do it for them. So what are we going to start doing differently?
Exercise Six (Find the Right Metaphor). Complete the following statement by filling in the four items indicated with brackets. When our initiative is operating at its peak performance, it can be compared with {name of a food}, {name of an animal}, {name of a game}, and {a trip to where}. Provide a reason for each choice.

Pick the metaphor that is most appealing and consider how the initiative might more effectively operate by building on this metaphor.

In addition to these when-if exercises, here are four other exercises in the same spirit that might be used to generate some original and valuable thinking:

Exercise Seven (Enter the Court Jester). What if a joker (court jester) spent the day observing and then chose to make fun of some aspect of the approach the initiative has been taking to increasing its impact on boundary partners. Where might the joker poke fun? Why there?

What actions might be taken to quiet the joker? Implement at least one of these immediately.

Exercise Eight (OOPS!). What are three things that might go wrong over the next year that would limit the success of the initiative in bringing greater numbers of partners farther along their respective journeys? How likely is each of these problem areas?

Develop at least one action item to reduce the likelihood or eliminate the possibility of each of these problem areas actually becoming a problem to the initiative. Implement these immediately.
Exercise Nine (Inspirational Leader). If any person, living or dead, real or fictional, could be recruited to spend a year with the initiative to maximize his impact on partners, who would you pick? What would they bring to the initiative that it is currently lacking?

Well, the reality is that this person is not available. What can be done to begin to approximate this level of inspiration with existing staff or options?

Exercise Ten (Providing the Unexpected). Think of three things that might be offered to boundary partners that likely would surprise them, exceed their expectations, and yet not be very costly to implement. Implement these.

The Quest for Quality

Transformation-focused work takes place in fluid, open-ended, and frequently surprising environments and contexts. Here, quality rather than quantity rules. Progress is attained not by brute force but rather by doing things differently, discovering which of these differences promotes a lifting of spirit in those touched (including self), and then figuring out ways to incorporate these spirit-lifting changes into work routines so that more are touched as well as touched more deeply.

When I look at one of my clients, usually an agency or foundation, I do not consider it only where it is along its journey with Outcome Engineering. I simultaneously see it having moved on to levels eight, nine, ten, eleven, and twelve—and leaving a legacy for others. I intuit the possibilities for it, not in detail but in spirit. Whatever I recommend to that client springs from these possibilities. I am not primarily interested in the client getting a little better, I want that client to be great or, if already great, still greater.

I am sometimes disappointed. My clients do not want to move as quickly nor as radically as I dream them moving. But I offer the possibility, while also responding to requests for more conservative and grounded forward steps. Occasionally at first, and now far more often as I have perfected my craft and the tools to offer to them, I discover clients that
surprise me in the best sense of that term. They show me that my dreams for them are not pie-in-the-sky. And they teach me things that I had not thought or dreamed about, things that I can immediately apply to improve my craft.

Maximizing Feedback

“Learn from the best in Japan. In Germany. In Switzerland. In Korea. In Taiwan. In Brazil. In Britain. It would be stupid not to. But let’s not allow the case for change to be clouded by any absurd notion that the Japanese, the Germans, the Americans, or anyone else have a patent on the future. No one does.”

Tom Peters

Doing good cannot be separated from being good. The growing collection of mapped journeys provides a clear and revealing picture of how good the initiative is doing in supporting and inspiring others. A parallel feedback process is needed as input to challenge the initiative to operate in constant-learning mode and be and remain as good as it can be.

Private sector businesses operate today with unprecedented flexibility and zest for change. However, even in the less-competitive public and non-profit sectors, today’s best practices are often short-lived for at least two reasons. First, we still have much to learn about how best to be helpful to others within an information-rich, global culture that is becoming ever more complicated and loaded with possibilities. Each success is a learning and growth opportunity for those involved and for the initiative overall. Second, sooner rather than later, an initiative will hear about a similar one that is doing something different and better, will try it out, and, if successful, add that new practice to its repertoire. In both these ways, the practices in all fields keep evolving and improving—and access to, and willingness to change based on, new and insightful information are keys to forward movement.

As Margaret Wheatley has noted, “For a system to remain alive, for the universe to move onward, information must be continually generated. If there is nothing new, or if the information that exists merely confirms what is, then the result will be death. We need to have information coursing through our systems, disturbing the peace, imbuing everything it touches with new life.” In the remainder of this section, a procedure will be suggested to ensure the steady flow of useful information into an initiative. This procedure is founded on a simple principle: the more radical or fundamental the
commitment to change, the more critical becomes insightful feedback from multiple sources and directions that can spark new learning.

Through reading, discussions with clients and peers, and experience, I have identified six practices that can and ought to be used to obtain such feedback. Each of these practices links the initiative to a different set of informants with unique types of insights and data that might–on any given day--prove useful to the initiative. These practices are:

Practice 1. Prospecting for Intriguing Ideas and Opportunities
Practice 2. Gaining Perspective from Respected Counselors
Practice 3. Obtaining the Blessing and Support of Our Next Highest Power
Practice 4. Redesigning a Basic Product/Service to Improve its Quality
Practice 5. Sharing Our Best Wisdom with the World
Practice 6. Experimenting and Messing Around to Remain Innovative

Practice 1. Prospecting for Intriguing Ideas and Opportunities. The literature on creativity is filled with examples of individuals who had major breakthroughs in their thinking as an immediate consequence of seemingly chance input. They had been stuck within a closed system of information; the new input opened their minds to new vistas and solution spaces. As repeatedly pointed out by those compiling studies on creative people, chance input works to stimulate thinking only after hard work has positioned individuals to benefit from this input. In short, out-of-the-box thinking can be profitable only after the box itself has been carefully constructed. The problem is that we become comfortable within that box and don’t generally knock our heads against its walls or open a window to let fresh air in.

Television, book stores, libraries, technical journals, magazines, and the Internet are all potential sources of random input for expanding and improving the work of a initiative. These inputs encourage out-of-the-box thinking by directing attention to a broad range of issue areas, successes, mishaps, and possibilities that are not part of the day-to-day experiences of the initiative staff and leadership. There is no telling which of these inputs will trigger a good, possibly great, idea that can benefit the initiative and its boundary partners.

Practice 2. Gaining Perspective from Respected Counselors. It is rare for a initiative busy doing good to take the time to step back and ask, “Are we good enough?” It is rarer still to have the initiative ask that question of others and pose it this way, “This is what we are doing to impact others. Does it make sense to you? Can you see any flaws in what we are doing or can you think of ways we might be doing it differently and better?”
A initiative intent on being and remaining at the “top of its game” ought to have at least a few key informants who it can turn to and ask for feedback of this type. These need to be individuals (or advisory groups) who are one or ideally several steps removed from the business of the initiative; who the initiative leadership respects for their insights and perspectives; and who are not afraid to ask the “dumb” questions that get to the root of things more quickly and deeply than do the clever and informed questions.

**Practice 3. Obtaining the Blessing and Support of Our Next Highest Power.** Nearly every initiative reports or is ultimately accountable to somebody or some entity with power to put a thumb down and squash the creativity of the initiative in mid-flow. It is important for a initiative to take actions that invite the blessings rather than the curses of these individuals or entities, particularly if the initiative is embarked on an innovative and potentially risky course of behavior.

An open bridge needs to be built and maintained across which trust can be built. This requires keeping that individual or entity informed about what the initiative is doing, particularly where changes are being made that might deviate from earlier initiative scripts. When concerns are raised, these need to be addressed promptly and in convincing manner. In addition, the initiative should remain alert to the priorities and issues confronting its next highest power, and suggest ways that its own work might support and help that individual or entity.

**Practice 4. Redesigning a Basic Product/Service to Improve its Quality.** In his insightful book, *Crossing the Chasm*, Geoffrey Moore noted that a creative enterprise has three very different audiences or markets to serve, each with its own needs and expectations from service providers. Lead-edge customers are ready to experiment with most any interesting idea the provider makes available. Early mass-market consumers are willing to take some risks, but only if the provider can assure them that it will be available to troubleshoot problems that arise as well as offer complementary services to enhance the original service. Late mass-market consumers are most interested in low-cost, easy-to-use services that they can “plug in” and begin using immediately. Forget the frills, give them the basics.

It is useful for a initiative to view its boundary partners this way and seek unique feedback from samples of each on current and expected performance. From its lead-edge partners, the initiative should encourage pie-in-the-sky thinking: What can the initiative offer that is incredibly novel and will re-define the field? From its early mass-market partners, the initiative should seek out sound, grounded advice: What are we doing well? What might we improve? Do you have any on-coming needs or
opportunities with regard to which we might also be helpful? From its late mass-market partners, the initiative should focus on its core service or services: Did our service(s) accomplish what you expected it would for you? Can you suggest how we might offer that service(s) in a more convenient or easy-to-use way?

**Practice 5. Sharing Our Best Wisdom with the World.** In former days of modest-speed change, a business had to hoard its best ideas for fear that a competitor might steal them and use them for its own advantage. In the current era of high-speed change, no idea stays current for very long. It is often useful to give the idea away to those who can also use it, anticipating that their usage of it and associated feedback to the initiative will benefit all parties substantially. This is the case of one plus one being greater than two (i.e., synergy).

A second reason for giving away a initiative’s best thinking is to create space for new and better thinking. The vacuum created by giving the idea away needs to be filled with something of equal or greater potency. This can prove to be a powerful motivator.

**Practice 6. Experimenting and Messing Around to Remain Innovative.** Inventors are frequently and with good reason characterized as childlike. They like to play around and do things that adults are no longer supposed to do. This is their gain and the adults’ loss. Through their play, they are apt to stumble on things that first amaze them and ultimately the rest of us.

**Do You Make the Grade?**

> “Change is a temporary force that pulls you in a new direction; but it must be applied continuously until the new behaviors become the norm, the new north. If you take the pressure off too early in a change process, the initiative will revert to the old way of doing business, old relationships, old behaviors, old processes, old habits.”
> 
> Harvey Robbins and Michael Finley

To encourage initiatives and initiatives to apply these practices, I have developed a simple-to-use self-assessment instrument, called Remaining on the Creative Edge. It is presented on the six pages that follow. Each page focuses on one of the six practices and challenges the initiative team to reflect on the quality with which it has addressed this practice during the previous time period (e.g., past month).
For each practice, the initiative team is presented with a set of activities and asked simply to check off those which at least one member of the team has performed during the time period of the assessment. Based on these data and the experiences associated with them, the team is asked to rate the intensity with which it engaged in this practice. For example, the team might agree that collectively they would rate the intensity of practice 1 as “high.” The team is next challenged to come up with the best example of the use of this practice during the time period. Individual team members volunteer what they view as their best use of the practice and the team then reaches consensus on which of these experiences was most valuable to the work of the team and its mission. They then rate the usefulness of the same practice. Assume that rating for practice 1 was “low.” This would suggest that they need to either cut back on intensity or, better still, look for different ways to practice.

Based on this evidence, the team then rates its performance of this practice as A, B, C, or D. An A-rating indicates excellent use of this practice during the time period, a D-rating indicates quite poor use (including no use at all). After completing this analysis for all six practices, a grade point average for the time period can be calculated by adding 4 for each A, 3, for each B, 2 for each C, and 1 for each D, then dividing the sum by 6.
Remaining on the Creative Edge: A Self-Assessment

INITIATIVE: ___________________  TIME PERIOD: ___________________

**PRACTICE 1. Prospecting for Intriguing Ideas and Opportunities**

1.1 ACTIVITIES (check any done by one or more initiative team members during this time period):

___ Came away from professional association meeting or conference with something of value
___ Came away from a network or committee activity with something of value
___ Utilized advisory group and acted on a suggestion
___ Found something intriguing in a publication
___ Drew on some previous experience from a different context or content area
___ Gleaned an intriguing idea from Internet or ListServe
___ Engaged others in brainstorming or other creativity exercise
___ Other

1.2 PERFORMANCE RATING THIS TIME PERIOD (check one for each scale):

<table>
<thead>
<tr>
<th>Energy Devoted to Practice</th>
<th>HIGH</th>
<th>MEDIUM</th>
<th>LOW</th>
<th>NO</th>
</tr>
</thead>
</table>

1.3 OUR MOST EXCITING STORY THIS TIME PERIOD STEMMING FROM THE PRACTICE:


1.4 PERFORMANCE RATING THIS TIME PERIOD (check one for each scale):

<table>
<thead>
<tr>
<th>Impact of Practice on Our Creativity</th>
<th>HIGH</th>
<th>MEDIUM</th>
<th>LOW</th>
<th>NO</th>
</tr>
</thead>
</table>

1.5 CHARACTERIZE THIS TIME PERIOD REGARDING PRACTICE 1:

<table>
<thead>
<tr>
<th>How well did we do?</th>
<th>A=excellent</th>
<th>B=very well</th>
<th>C=a typical month</th>
<th>D=quite poorly</th>
</tr>
</thead>
</table>
PRACTICE 2. Gaining Perspective from Respected Counselors

2.1 ACTIVITIES (check any done by one or more initiative team members during this time period):

___ Engaged a respected counselor (key informant) face-to-face to gain perspective
___ Had e-mail and/or phone interaction with a respected counselor to gain perspective
___ Shared documents with a respected counselor to glean feedback
___ Encountered and met with key informant at larger meeting/conference to gain perspective
___ Other

2.2 PERFORMANCE RATING THIS TIME PERIOD (check one for each scale):

<table>
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<th>HIGH</th>
<th>MEDIUM</th>
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<th>NO</th>
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</thead>
</table>

2.3 OUR MOST EXCITING STORY THIS TIME PERIOD STEMMING FROM THE PRACTICE:


2.4 PERFORMANCE RATING THIS TIME PERIOD (check one for each scale):

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<tr>
<th>Impact of Practice on Our Creativity</th>
<th>HIGH</th>
<th>MEDIUM</th>
<th>LOW</th>
<th>NO</th>
</tr>
</thead>
</table>

2.5 CHARACTERIZE THIS TIME PERIOD REGARDING PRACTICE 2:

How well did we do?  A=excellent  B=very well  C=a typical month  D=quite poorly
PRACTICE 3. Obtaining the Blessing and Support of Our Next Highest Power

3.1 ACTIVITIES (check any done by one or more initiative team members during this time period):

___ Kept him/her/them informed about our latest work
___ Translated our latest work to language he/she/they could easily grasp
___ Maintained an open bridge along which trust could be built
___ Learned what his/her/their priorities were as these had implications for our work
___ Demonstrated we were listening and responsive to his/her/their concerns
___ Other

3.2 PERFORMANCE RATING THIS TIME PERIOD (check one for each scale):

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</table>

3.3 OUR MOST EXCITING STORY THIS TIME PERIOD STEMMING FROM THE PRACTICE:

3.4 PERFORMANCE RATING THIS TIME PERIOD (check one for each scale):

<table>
<thead>
<tr>
<th>Impact of Practice on Our Creativity</th>
<th>HIGH</th>
<th>MEDIUM</th>
<th>LOW</th>
<th>NO</th>
</tr>
</thead>
</table>

3.5 CHARACTERIZE THIS TIME PERIOD REGARDING PRACTICE 3:

<table>
<thead>
<tr>
<th>How well did we do?</th>
<th>A=excellent</th>
<th>B=very well</th>
<th>C=a typical month</th>
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</thead>
</table>
PRACTICE 4. Re-designing A Basic Product/Service to Improve its Quality

4.1. ACTIVITIES (check any done by one or more initiative team members during this time period):

___ Got feedback on product/service design from reviewers or clients
___ Sought out a new partner with potential to add value to a product/service
___ Brought in expert to help develop and revise material or protocol
___ Seriously considered way to tap into emerging new technology or gadgetry
___ Tweaked or made an improvement to a product or service
___ Made follow-up contacts post-delivery to a sample of clients
___ Responded quickly to call-back initiated by consumer
___ Other

4.2 PERFORMANCE RATING THIS TIME PERIOD (check one for each scale):

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4.3 OUR MOST EXCITING STORY THIS TIME PERIOD STEMMING FROM THE PRACTICE:


4.4 PERFORMANCE RATING THIS TIME PERIOD (check one for each scale):

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<tr>
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<th>LOW</th>
<th>NO</th>
</tr>
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</table>

4.5 CHARACTERIZE THIS TIME PERIOD REGARDING PRACTICE 4:

How well did we do?  A=excellent B=very well C=a typical month D=quite poorly
PRACTICE 5. Sharing Our Best Wisdom with the World

5.1 ACTIVITIES (check any done by one or more initiative team members during this time period):

___ Presented our best new work or thinking within our own initiative
___ Presented it at conferences
___ Contributed to publications, newsletters, papers, and books
___ Engaged in Internet exchanges and dissemination (ListServe, website)
___ Interacted with media
___ Shared our best practices with peers or clients at an event
___ Made changes to our website or other outreach media
___ Other

5.2 PERFORMANCE RATING THIS TIME PERIOD (check one for each scale):

<table>
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5.3 OUR MOST EXCITING STORY THIS TIME PERIOD STEMMING FROM THE PRACTICE:


5.4 PERFORMANCE RATING THIS TIME PERIOD (check one for each scale):

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</table>

5.5 CHARACTERIZE THIS TIME PERIOD REGARDING PRACTICE 5:

<table>
<thead>
<tr>
<th>How well did we do?</th>
<th>A=excellent</th>
<th>B=very well</th>
<th>C=a typical month</th>
<th>D=quite poorly</th>
</tr>
</thead>
</table>
LL PRACTICE 6. Experimenting and Messing Around to Remain Innovative

6.1 ACTIVITIES (check any done by one or more initiative team members during this time period):

___ Experimented with different presentation format
___ Interacted with a boundary partner in a totally different way
___ Consciously challenged some established practice
___ Talked through some new opportunity with team
___ Interacted with team members in a social or recreational activity
___ Put on a “joker’s hat” and made fun of our work
___ Took a needed break from normal work routine
___ Other

6.2 PERFORMANCE RATING THIS TIME PERIOD (check one for each scale):

<table>
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6.3 OUR MOST EXCITING STORY THIS TIME PERIOD STEMMING FROM THE PRACTICE:


6.4 PERFORMANCE RATING THIS TIME PERIOD (check one for each scale):

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</table>

6.5 CHARACTERIZE THIS TIME PERIOD REGARDING PRACTICE 6:

<table>
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<th>How well did we do?</th>
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<th>B=very well</th>
<th>C=a typical month</th>
<th>D=quite poorly</th>
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</table>

OUR OVERALL GRADE POINT AVERAGE FOR THIS TIME PERIOD: _________
About the Author

I am a Senior Research Scientist with the Pacific Institute for Research and Evaluation (PIRE). I direct PIRE’s Results Mapping Laboratory. I divide my time between Chapel Hill, North Carolina and Tucson, Arizona, although I am frequently at other locations providing training or presenting my approach and methodologies.

I earned my Ph.D. in city and regional planning from the University of California at Berkeley. My earlier academic training was in operations research and mathematics. At different times in my career, I served on faculties at the Hebrew University in Jerusalem, the University of North Carolina in Chapel Hill, and Howard University in Washington, D.C.

I have two grown children. Toni is an artist living in the Galilee Area in Israel. Danny is a systems engineer dividing his time between Tel Aviv and New York City. My wife, Anne Hancock, helps make my life both entertaining and a constant adventure. I have a life-long interest in the writings and teachings of mystics of all faiths. I enjoy drawing and solving tricky crossword puzzles.
For More Information

The Results Mapping Laboratory provides consultation and training in the creative and effective use of the tools presented in this document. We also offer an Internet-based application that maximizes the utility and value of these tools. The application can be set up and used to generate useful data in relatively little time. In most cases, a program or set of programs can be on-line with less than one day of customization and preparation of its site. As a complementary bonus for the funder or sponsor, there is no need to wait around for quarterly, semi-annual, or annual reports. The application automatically generates reports to reflect and summarize the latest data that have been provided. Authorized personnel can get on line and view journals, benchmarks, and other progress measures at any time and draw their own conclusions regarding how sites are performing and also what might be done to enhance performance.

Question. What does this cost?

The basic cost for using the application for one year is $1,000 per initiative. An initiative is defined as a unique site with a set of program staff and a set of clients who they support on their respective journeys. The annual fee entitles the initiative to unlimited off-site (phone or e-mail) support to ensure that maximum use is made of the application and maximum benefit accrues. No limits are typically placed on the number of clients or mappers. There are additional, one-time, set-up costs (typically no more than $300). On-site training is provided, upon request, at a daily rate of $1,500 plus related travel expenses.

I hope this brief introduction and listing of advantages have whet your appetite to see and learn more. To arrange a guided tour, send a request to journey@pire.org. For additional information regarding Journey Mapping, please contact:

Barry M. Kibel, Ph.D.
Director, Results Mapping Laboratory
Pacific Institute for Research and Evaluation
104 S. Estes Drive, Suite 206, Chapel Hill, NC 27514
Phone: (919) 967-8998 x14
e-Mail: kibel@pire.org