

ICA-USA

Living Legacy Event Report

October 5-7, 2007

Chicago, Illinois

“Discerning a vibrant legacy for today and the future”



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Event Summary



The Purpose

The Living Legacy Event brought together individuals from across the countries that are connected to the methods, work, history and mission of the Institute of Culture Affairs (ICA). ICA-USA sponsored the event as a part of its Year of Discernment. The intent was to celebrate past, present and future of the network of people connected to ICA, assess the roots and wings of the 40 year old organization and help discern the next chapter of service. Participants spanned all four decades of national and international work. Specific objectives of the event included the following:

- A. Affirm and celebrate the varied work across the nation and the world that expresses the spirit of ICA
- B. Build on the wisdom of thousands of pioneers who have invested in releasing people's capacity for creating positive futures
- C. Contribute to the ongoing task of shaping the future and discerning the role of ICA-USA

The Process and Results

Friday: Celebrating and Discerning the Impact of the "Big We" ICA-USA

The Living Legacy Event began with an evening of acknowledging and assessing the ICA-USA's history, work and impact that the work of ICA-USA's broad community of care has and is having.

Opening reception and introductions

The Board of ICA-USA hosted a gathering to welcome and introduce the Board, staff, participants and facilitators in a space filled with displays of programs, books and projects featuring work of the ICA network. Here are the kinds of things that brought participants to the event:

What brought you here?

- *Quest for direction:* See where we are going; want to be part of the future; interested in seeing what we will do in the future
- *Desire to learn:* Get questions answered; assess the transition; discuss the living legacy;
- *Engage with colleagues:* Meet those I talk with to see the past and the future; be with others
- *Help grow what helped me grow:* Commitment to strengthen relationships; owe ICA a whole lot; deepen the values and rich heritage; respect and trust of ToP and ICA people and commitment to the future; ICA made a profound change in my life 35 years ago and I want to take it forward; it is my community, I want to see it continue and thrive; came to learn, value and respect the past, present and future; this is my community and family; 40 years ago I went to a course and never got over it; my heart was given to ICA long ago
- *Passion and conviction:* This is what the planet needs; felt I had to be here; Don't get places without opening doors; passion makes a difference; have curiosity and hope
- *Continue network participation:* Make connections from the International Association of Facilitators; active in facilitation now and in the future; use ICA tools and want to continue to be able to do so
- *Experience vacation:* My wife said a change of trouble is as good as a vacation
- *A mode of transport:* I-94; a United flight; a Chicago cab

Event Summary Continued



Friday: Celebrating and Discerning the Impact of the “Big We” ICA-USA Continued

Evening Session: Developing a collective picture of the *Big We*

After a brief context for the weekend, participants engaged in a wave analysis of trends to identify their experience of the network. They created a conceptual “inventory” of the activities, efforts, ideas, operating values and other trends coming into being, emerging, established and going out of being.

What have been ways that we have referred to the ICA Network?

See p.8

The <i>Big We</i>	Those using ICA methods	Those Who Care
The spirit movement	The league	The blue shirts
The Trans-establishment	The invisible college	The guardians
The Order Ecumenical – formal, movemental and latent		Etc.

The trends covered the shifts, changes and evolution of...

See details pp.9-10

- ...organizational forms
- ...network interaction and engagement
- ...programs and program delivery
- ...research and development efforts
- ...community development work
- ...addressing 21st century spirituality
- ...society and the world

Reflection on the wave analysis and collective picture of the “Big We”

See p.11

Saturday: Discerning the Future of ICA-USA

Conduct a dialogue to address the following focus question: What does ICA-USA need to do to support, serve and be an integral part of emerging change networks?

ICA-USA Briefing

See details pp.12-13

The President of Board briefed the group on the past and future activities of the *Year of Discernment* and the work that has been done to identify the mission, goals and objectives of the ICA-USA. Also, the participants reviewed the freshly published Annual Report. Following the presentation, the group reflected on their observations, reactions, questions and other comments regarding the current state and future directions of the ICA-USA.

Legacy Luncheon: Honoring of founding families and other invited guests

The participants welcomed special guests from ICA’s original Human Development Project in Chicago and celebrated them and all other people who launched the organization. Participants also enjoyed exhibits from the Global Archives, letters from those who celebrated in absentia and reviewed various writings about the history of the ICA and its sister organization, the Ecumenical Institute.

Event Summary Continued



Saturday: Discerning the Future of ICA-USA Continued

Assessment and advice

In the afternoon, participants worked in six groups to assess the current advantage and challenges of the ICA-USA as a network organization and propose action advice for the future. At the final plenary, the advice from work groups was synthesized into common action areas and offered to the ICA-USA on behalf of the ICA network.

Advantages and Assets:

See the details on pp. 14-15

What has been achieved or built that we don't want to lose and need to build on?

- A. Immense collective competence, brain trust and social capital within the ICA network
- B. Enduring commitment to spirit-driven transformation of individuals, communities and world
- C. Abundance of core methods and wisdom that are and could be used for global development
- D. Capacity for research that is unique, collaborative and experience-based
- E. Opportunity to revitalize the passion and power of the network
- F. Existence of formal ICA organizations

Challenges and Questions:

See the details on pp. 16-17

What are weaknesses and "development areas" in moving into the future?

- A. Limited ways to engage and associate with the ICA-USA
- B. Minimally-transparent communications and governance practices
- C. Disconnect between "old" and "new" people, practices and programs
- D. Assuring that ICA programs/ventures retain a human spirit and transformation focus
- E. Addressing the individual/organizational losses and impacts of staff lay-offs
- F. Informal mechanisms for preserving, accessing and building on the wisdom of the collective ICA
- G. Unclear long-term model for programming and resources of the ICA
- H. Disrupted support structure for program delivery

Advice:

See the details on pp. 18-21

What can ICA-USA do to support, serve and be an integral part of emerging/existing networks?

- A. *Identify, develop and mobilize* "signature" programs and initiatives (11 advice proposals)
- B. *Build* communication and engagement structures to broaden participation (8 advice proposals)
- C. *Enhance/revive* a focus on human spirit and transformation in programs/operations (7 advice proposals)
- D. *Resume research* efforts that inform and impact community and societal issues (7 advice proposals)
- E. *Use* modern technology to support effective internal and external operations (6 advice proposals)
- F. *Use* face-to-face interaction a preferred way to communicate and collaborate (6 advice proposals)
- G. *Develop* and clarify ICA-USA's governance/management values, roles, processes (6 advice proposals)
- H. *Strengthen* ICA-USA and ICAI Partnership (4 advice proposals)
- I. *Develop* effective working agreements (3 advice proposals)
- J. *Demonstrate* fiscal responsibility and establish a sustainable revenue base (3 advice proposals)
- K. *Reconcile and heal* relationships in order to go to places that are better than now (3 advice proposals)

Advice Debriefing

See reflection on shift/fears and fascinations on p.22

What are we moving *from* and *to*?

From being told the future *to* defining the future

From a storm on the lake *to* a sign of dawn

From dark *to* light

From confused *to* slightly less confused

From a full pantry and refrigerator *to* making the meal

From the Year of Discernment *to* waiting to see what emerges

From illusion *to* reality

From bewilderment *to* hope

From confusion *to* aha!

From fear *to* life is good

Event Summary Continued



Saturday: Discerning the Future of ICA-USA Continued

Celebration in the Global Lounge

The evening provided an opportunity for formal and informal celebration of the ICA-USA past, present and future. Guided by the celebration team, participants stepped back from the day's work to "roast" memorable moments in the dialogue with humor and affirm the longstanding passion and the commitment of the "Big We" with song, historical ICA films and spirited fellowship.

Sunday: Initiating the Next Phase of ICA-USA Service

Identifying the next steps in supporting the work of the ICA-USA and its collaboration with ongoing networks

Breakfast and Closing Conversation

See reflections details on pp.23-24

The Living Legacy Event concluded with a collegial forum to reflect on the weekend and launch the next phase of ICA-USA network engagement. Poetry, singing and gifts ritualized and recognized the valuable engagement and contributions of the assembled group. The following poem by Janice Ulangca represented the underlying sentiment and hope of the weekend dialogue:

In Praise of Face to Face

We used to wait for mail
To be in touch.
But now,
Ideas, feelings, pictures, voices
Fly instantly around the world
I'm often now in touch with you –
Somewhat.

Still-
I hunger for the wholeness
Of who you are
And who it is that we might be
Together.

Our decision brought us to this place
Where all the wholeness each of us can bring
Complements, collides, creates an energy explosion
Such as pieces of us cannot do.

Now what you've learned
Your victories, and even grief and wounding
I gently and respectfully
Claim as gift for all.

October 7, 2007
Janice Ulangca

Event Details

A. Big We” Discernment.....	6
<ul style="list-style-type: none">• Ways we have referred to the ICA network• The Wave Analysis• As you observe and engage in the “Big We Network –• those using the methods and ideas of the ICA – what activities, efforts,• ideas, operating values and other trends are coming into being, emerging,• established and going out of being?• Reflection on the Wave Analysis and collective picture of the “Big We”	
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“Big We” Discernment



The “Big We”

What have been ways that we have referred to the The ICA Network?

- The *Big We*
- Those using ICA methods
- Those Who Care
- The spirit movement
- The league
- The blue shirts
- The Trans-establishment
- The Order Ecumenical – formal, move mental and latent
- The invisible college
- The guardians
- Etc.

The Wave Analysis

As you observe and engage in the “Big We Network – those using the methods and ideas of the ICA – what activities, efforts, ideas, operating values and other trends are coming into being, emerging, established and going out of being?

See the following two pages for the results of the exercise



Developing a Collective Picture of the ICA “Big We” Network



As you observe and engage in the “Big We” Network - those using the methods and ideas of the ICA -, what activities, efforts, ideas, operating values and other trends are...

... ON THE FAR HORIZON? What activities, events, efforts, ideas and trends are <u>boundary ideas</u> ?	... EMERGING? What activities, efforts, ideas and trends are <u>gaining attention and momentum</u> ?	... ESTABLISHED? What activities, events, efforts, ideas and trends are <u>visible and well-developed</u> ?	...DISAPPEARING? What activities, events, efforts, ideas and trends are <u>no longer an operating reality</u> ?
Shifts, changes and evolution in organizational forms and practices			
<ul style="list-style-type: none"> ■ The Springboard – Re-establishing the order ■ ICA evolving into an association ■ Specific skill set for task (vs. older mode of generis skill set) ■ Disconnect with prior old order/paid staff – all relevant roles in the new face of ICA ■ New organizational structures to re-focus/revitalize EI/ICA ■ Viable, sustainable organization ■ Electronic fund development (donations) ■ Collaboration mode between national ICAs 	<ul style="list-style-type: none"> ■ ICA-International in Canada ■ Cooperative NPO funding – government organization – private funds; foundation – other NPOs ■ Institutional web presences ■ Policy manual for ICA staff ■ Participatory decision-making throughout ICA ■ Ongoing identification of Executive Director role ■ ICA as a not-for-profit-business ■ Fiscal responsibility ■ ICA-USA as a network organization ■ Need to grow through partnerships <ul style="list-style-type: none"> - Weed and seed (Troy) - Team of 6 with ICA only 1 or 2; Government/community group/church ■ Budget development ■ Care for earth in our own facilities and processes 	<ul style="list-style-type: none"> ■ Professional staff with skill sets to match the job descriptions ■ Board-driven decision making ■ Strong Board of Directors ■ Annual Reports if 501 (c) 3 group ■ I office of ICA-USA ■ ICA globalization 	<ul style="list-style-type: none"> ■ Continuity of activities ■ Complex financial arrangements ■ Old business plans that are not financially viable (egg. - Dedicated teams flying around doing programs; client creates their own business plans) ■ ICA centralization ■ Notion that the group can only operate on consensus ■ Militaristic structure (e.g. assignments, time expectations etc) ■ Kemper Building as ICAs center
Shifts, changes and evolution in network interaction and engagement			
<ul style="list-style-type: none"> ■ Redirected energy to re-fuel passion (reconciliation with ourselves) ■ Volunteer vehicles and options ■ Inclusion at every level – broad community ■ Mass shared electronic collaboration 	<ul style="list-style-type: none"> ■ Institutional web presences ■ Denver cadre ■ Systems of networks for program delivery – fluid and mobile ■ Online book studies ■ Knowing how to facilitate virtual teams ■ Participatory decision-making throughout ICA 	<ul style="list-style-type: none"> ■ ICA spin-off -- California/Chicago ■ New gathering patterns for groups ■ Majority of the ICA work is done virtually <ul style="list-style-type: none"> • The Directory • Electronic communication • Earthrise Community witnesses listserve • “Selective communications process” • Working through e-mail and phone across geography ■ Initiatives Newsletter ■ Books 	<ul style="list-style-type: none"> ■ Nurturing the community (e.g. house church) ■ Passion and spirit lost when ICA became institutionalized ■ Volunteers ■ Participation of 30-40 year olds ■ Grassroots participation in ICA-USA; entry points to broad-based participation are/have disappeared ■ Song writing and singing

As you observe and engage in the “Big We” Network - those using the methods and ideas of the ICA -, what activities, efforts, ideas, operating values and other trends are...			
... ON THE FAR HORIZON? What activities, events, efforts, ideas and trends are <u>boundary ideas</u> ?	... EMERGING? What activities, efforts, ideas and trends are <u>gaining attention and momentum</u> ?	... ESTABLISHED? What activities, events, efforts, ideas and trends are <u>visible and well-developed</u> ?	...DISAPPEARING? What activities, events, efforts, ideas and trends are <u>no longer an operating reality</u> ?
Shifts, changes and evolution in programs and program delivery			
<ul style="list-style-type: none"> Authentic response to global issues Co-housing focusing methods ICA out sources program delivery 	<ul style="list-style-type: none"> New ToP courses Methodologies are content less – what are our gut concerns that will drive programs? ICA methods becoming “generic” Widely accessible information including ICA-I archives; electronic and open source access Knowing how to facilitate virtual teams Learning Basket Program Need to create workbooks for a diversity of methods -Community development; study methods; research methods; project implementation; storytelling, Etc 	<ul style="list-style-type: none"> ToP Training and ToP Trainer Network Individual trainer agreement with ICA Curriculum for ToP We are hired facilitators in someone else’s program Hordes of methods 	<ul style="list-style-type: none"> Only one ToP method of facilitation Only one best way Moral imperative as context/motivation for action Human development projects Our uniqueness – distinguishing ourselves from other programs Training Inc. Dedicated teams flying around doing programs ICA-USA as the chief mechanism for delivering programs Structural aspects of process Geographically anchored and delimited location programming
Shifts, changes and evolution in research and development efforts			
<ul style="list-style-type: none"> Digitizing archives 	<ul style="list-style-type: none"> New interest in archives and its need by ICA-USA Re-establish research and relevant applications 	<ul style="list-style-type: none"> Books 	<ul style="list-style-type: none"> Summer programs
Shifts, changes and evolution in community development work			
	<ul style="list-style-type: none"> Denver Neighborhood Academy Individual volunteer travel in support of ongoing projects (example HIV trek) Migrant and immigrant issues 	<ul style="list-style-type: none"> HIV/AIDS community mobilization HIV/AIDS Africa Project Micro-multinational ventures (social, business, etc.); start small & go global immediately Whitney’s Bus; imaginal education for offenders City/State-focused projects 	<ul style="list-style-type: none"> Pre-schools
Shifts, changes and evolution in addressing 21st Century Spirituality			
	<ul style="list-style-type: none"> Secular journey dialogue Spirit retreat dialogues 	<ul style="list-style-type: none"> Secular Christianity and spirituality Return to religious ties Growing commitment to theological foundations 	<ul style="list-style-type: none"> Religious ties
Shifts, changes and evolution in Society and the world			
<ul style="list-style-type: none"> Inclusion at every level; broad community Globalization (world is flat); and how it affects top-down organizations; demand for quick response etc. Intellectual property changing to open source knowledge 		<ul style="list-style-type: none"> Ineffectiveness of long-term change; sustained effort hard to get; Short-term follow-up and results wanted 	<ul style="list-style-type: none"> Ability to not be globally aware

“Big We” Discernment Continued



Reflection

What stood out for you as we developed a collective picture of the “Big We?”

Discussion comments:

- I was struck with the terms “not-for-profit business”
- I was struck by what is not there – the projects and efforts that are not officially related but related
- We covered concrete and philosophical elements
- There was a clear thread about “being driven by spirit;” it seems to be what attracts people to the networks
- Perceptions are indeed influenced by position -- what you *see* depends on where you *sit*
- People look at things and a) say we need to do things differently, b) say we need to think differently – It seems we are pointing to the need for cultural solutions. It is dangerous if we lose the cultural
- It was a way of reconciling ourselves; recognizing some dis-associating in hopes of re-energizing ourselves

How does the evolution of the ICA network connect to societal trends and changes?

Discussion comments:

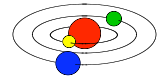
- When the world changed to using virtual formats, it became dispersed. However, that format is contributing to a gradual trend of becoming more centralized
- There is a growing challenge everywhere of living within and influencing in a world where you can do things instantaneously
- We are reeling with the overload of information and a lack of ways to step back, reflect, process it and utilize it for ourselves. We have unique tools for that
- There is a seeming gap in the ICA-USA priorities responding to the world’s question regarding children
- Intensifying questions about peaceful relations with “the other” - How do I relate to “the other” and not kill them?; There are a lot of others and know more about them
- In considering our future programs and priorities, it is unhelpful to talk to people until you know what question they are asking
- Overall, people seem to be becoming more self-oriented
- We need to step back and ask -- what do we have to solve the world’s problems?

What advice do we have to ourselves as we continue discernment at this event?

Discussion comments:

- We are all here due to different roots. We need to pay attention to secular and religious roots. We are not talking about just the ICA. The Faith and Life Community birthed the Order Ecumenical and then the ICA.
- It is good to remember that the “Big We” is not just an ordinary 501(c) 3. I don’t think we need to retrofit the ICA-USA network to be that
- Our perspective is ICA-USA vs. the globe. Yet, we need to think about how we keep a global perspective and look at sharing our big resources with others in the world
- Let’s not be afraid to let something go. In “doing out of our hearts,” we may get too broad. We cannot satisfy all things and needs
Need to allow all our roots to emerge
- We cannot re-generate if we lose the seed. We need to use what is valuable from the past in order to allow us to move into new territory (e.g. Muslim world).
- Let’s look at what’s disappeared and how it affects us today; what is emerging that can make up for losses?
- Keeping a detached perspective is important. We came to the session with our own perspectives and we need to stay open to all the other perspectives
- Profound community is not being all of one mind
- Stay open to continued dialogue -- keep our ideas up, volley them around, allow them to be considered.
- Keep focused on what is the social issue. (e.g. people being victims) Analyze how we have been able to transform critical issues of individuals/communities in our past and present work in the world

ICA-USA Briefing



Presentation Outline:

Mission of ICA-USA

Releasing the capacity to create positive, sustainable futures in every individual, organization and community

Strengths to build on:

Network organization for training spirits

- Globally connected for impacts
- Collaborative research for innovation

Core activities: Training, Demonstration, Research

- Collaboration supports *Research* and *Demonstration*
- Social change networks support and are supported by *Research* and *Training*
- Best Practices support and are supported by social change networks

ICA-USA Mission Goals:

- Inclusive participation and comprehensive approaches become the hallmark of civic, social and community life
- All families become confident and effective first teachers for their children
- People of diverse perspectives, ages and communities build common ground and understanding
- Innovative initiatives are catalyzed for solving global challenges

ICA-USA Mission Objectives:

- ICA-USA is a national leader in facilitation training
- ICA-USA partners with social change networks for national program delivery
- ICA-USA is a respected resource in early education programs
- ICA-USA conducts collaborative research that stimulates creative programs and depth events for the ICA learner
- ICA-USA uses best non-profit practices and is connected to its local neighborhood
- ICA-USA is an active member in ICAI to cooperate and support human development and contribute to global efforts for positive social change

Reflection:

What ELEMENTS caught your attention in the ICA-USA overview and Annual Report?

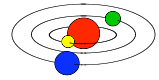
Representative discussion comments:

- I liked seeing the term “ICA learner.” As a life-long learner, it is a reassuring and affirming phrase
- “ICA Learner” and emphasis on early education stood out – parents needing to serve as the first teachers for children.
- “Releasing the capacity to create” harkens back to the old saying – maybe anything is possible if you are willing to give others the credit
- Glad to see that best practices; collective research, local neighborhood connection, diverse participation, solutions for global challenges and effective first teachers are part of the mission and goals

What were immediate REACTIONS?

Representative discussion comments:

- Surprised to hear that ICA will work only through other organizations
- The first time I heard what the Board has been about .They have engaged in a thoughtful process focused on the future



Reflection: Continued

What QUESTIONS were raised for you?

Representative discussion comments:

- The intent to be a “national leader” -- how does that square with being the behind-the-scenes support of the invisible college?
- Linguists would have an interesting time with “living, breathing organization;” What are the signs of a living, breathing organization?
- How do we measure being “national leaders” or catalyzing parents to be “effective first teachers”
- “Releasing organization capacity” in the mission. How does that show up?
- What do we mean by best practices?

The assembled body offered the following

Ways to do something that someone else has shown and become

Evidence-based and not necessarily academic
research-based

Has a benchmarking element

Antonym for relying on charismatic leaders

Organic set of understandings

In ICA we used to call it “sharing approaches that work”

- How do we raise money for operations and projects if we are not directly delivering programs, training and other services?
 - It’s a lot harder to catch someone’s imagination
 - If ICA-USA asks Bill Gates for money to broker other people’s program delivery, would they not opt to give the money directly to the delivery institutions?
 - One main reason that ICA programs have been effective is that the people who deliver have experienced the program’s transformational capacity themselves
- What is our uniqueness – are there other organizations like us?
- Now that the vision is established, when is the contradiction analysis?

What are other comments or INSIGHTS you wish to share?

Representative discussion comments:

- ICAI conference in Japan will enable people to hear about ICA-USA and how we may be same and different from other ICAs
- The structure developed in Guatemala in 2004 is not the way we will be in 2008; need to offer what has been our journey
- If Mary Warren Moffett were here, she would probably ask,” How are you going to symbolize the new mission and the way we have changed?
- Hallway posters are filled with the projects and organizations that I would like to be involved with. I hope they are part of the ICA-USA change networks
- There have been/are underlying tensions/shifts in being *disestablishment* people in an *establishment* world
 - Shift from “attacking the victim image” through participatory methods/decision-making and a stance that “anyone can do anything,” to understanding that skill sets are real and a “set of ideas” should be represented by a person sitting at the table in order to operate in the mainstream
 - Shift from “start with spirit not consumerism” to “need an organization to function in a successful economic model”
 - Shift from being motivated by personal ethic of total value of every human being (e.g. measuring success in community work when shrines are cleaned up) to being covertly spiritual/religious as a not-for-profit
 - Shift from the “invisible force” to building “brand identify”

Advantages



Advantages and Assets:

What has been achieved or built that we don't want to lose and need to build on?

A. Immense collective competence, brain trust and social capital within the ICA network

Related advantages and asset identified in LL Event working groups:

- Relationships with colleagues.
 - ...that is a brain trust, knowledge base and keepers of archives --a key to their transferability
(*Brain Trust = institutional wisdom and competence that resides in the brains and hearts of people within the organization*)
 - ...with passion
 - ...that can sustain spirits for the long haul and provide absolution for moving ahead
- Opportunity to harvest learning/wisdom of colleagues who have moved beyond "ICA"
- Concern and willingness to make change in the world
- Opportunity to connect many related groups by defining terms
- Networks
- ICA spin offs
- People that can help us
- Relationship with the ToP network
- Kemper Community Resource Center
- Kemper Building and relationship with Uptown and community
- Opportunity to reconnect and build potential through existing organizational relationships with North Carolina, Troy, Minneapolis, Denver, Seattle, Albuquerque, Greensboro, Asheville, Phoenix, Coquito, Georgia. A, reconnect / build potential
- Vast numbers of people who have met and connected with ICA -- a large database
- Lots of people with common depth experiences and common languages
- Lots of people with diverse experiences and languages who still want to be involved
- Volunteer engagement with local organizations
- Capturing volunteer involvement
- Books written and waiting to be written

B. Enduring commitment to spirit-driven transformation of individual, communities and world

Related advantages and asset identified in LL Event working groups:

- "Spirit" sense remembered
- Inclusiveness and acceptance as a state of being
- Capacity to be reflective
- Celebrative in all situations -- thankfulness
- Spiritual connections
- Sustaining structures and communities
- Sense of spirit and vocation
- Concern and willingness to make change in the world
- Spirit
- Trans-establishment styles and approaches
- Calling to profound vocation (foundational) -- care of the earth
- Generosity of the heart of this organization

Advantages Continued



Advantages and Assets:

What has been achieved or built that we don't want to lose and need to build on?

C. Abundance of core methods and wisdom that are and could be used for global development

Related advantages and asset identified in LL Event working groups:

- The methods and transferring methods
- The ToP curriculum
- The principles of community development - 5 Economic, 5 Political and 5 Cultural
- Courses and events that release individual capacity
 - GFM
 - IToP
 - ITP
 - RSI
- ToP methodology and other constructs such as learning basket, etc. al.
- Methods and packaged methods
- ToP methods
- Successful products, programs and projects
- Multiple and flexible revenue streams
- Curriculum and developed materials
- The archives are a major asset
 - Need to increase their transferability
 - Need to preserve this “primary” source material
 - Need to update and “translate” key methods and documents for target audiences
- Long history of a “lot of stuff” and archives to be used as base material for new courses, books, etc.

D. Capacity for unique, collaborative, experience-based research

Related advantages and asset identified in LL Event working groups:

- Collaborative research capacity
- To stay on top of the spirit edge
- Host research events
- Effective collaboration on wisdom through sharing of successes and failures
- Collaborative research for innovation

E. Opportunity to revitalize the passion and power of the network

Related advantages and asset identified in LL Event working groups:

- Opportunity for an interactive website and live meetings
- Gatherings
- Enriching in variety of ways
- Applicable to infinite settings to support personal/local involvement
- Using e-mail, list-serves and web to connect people around the world

F. Existence of formal ICA organizations

Related advantages and asset identified in LL Event working groups:

- Vitalized ICA International
- *National* organization
- *National* office
- Mission

Challenges



Challenges and Questions:

What are the weaknesses and “development areas” in moving the ICA-USA into the future?

A. Limited ways to engage and associate with the ICA-USA

Related challenges, questions, weaknesses and/ or developmental areas identified in working groups:

- No mechanism for a “first engagement” or point of entry with ICA
- Don’t have open doors and continuing points of engagement
- No way for others to identify that “I am ICA!”
- No ways to associate with the ICA outside being on the Board or staff
- Barriers for affiliation is a weakness
- Volunteer pool is a developmental area
- Need mentoring in order to belong and participate in organization is a developmental area
- ICA-USA is not a membership organization so money will not result from increasing members
- Lack of formal and legal relationships and rules between ICA-USA and the networks it wants to serve
- What institutional format will engage people to invest their lives to create a better future?
- What format(s) are viable in 21st Century?

B. Minimally-transparent communications and governance practices

Related challenges, questions, weaknesses and or developmental areas identified in working groups:

- Effective communication is a developmental area
- Unlike the present, sharing of information was “open” and free
- Ineffective communication patterns
- Incomplete information
- Diminished capacity to discern fact from mythology
- Distrust of healthy practices for managing an organization (historical by some stakeholders)
- Avoidance of accountability and evaluations related to accounting, fundraising, budgeting and measuring outcomes
- No historical measures
- Transparency in organization behavior and finances is a weakness
- Lack of a “governing” board is a weakness
- New structure of “governing board”, ED, staff, volunteers, stakeholders is a developmental area

C. Disconnect between “old” and “new” people, practices and programs

Related challenges, questions, weaknesses and or developmental areas identified in working groups:

- Disconnect between old and new relationships
- Exclusiveness
- Disrespect of newer trained people
- “Old boy” network is a weakness
- Lack of diversity
- Culture of respect -- walking the talk internally is a weakness
- No process for incorporating new courses and programs into curriculum (historical by some stakeholders)
- Credibility based on the past
- Need to strengthen the Board with more diversity
- Staff with limited experience with ICA methods
- Assuring acceptance of the new Executive Director

Challenges *Continued*



Challenges and Questions:

What are the weaknesses and “development areas” in moving the ICA-USA into the future?

D. Assuring that ICA programs/ventures retain a focus on human spirit and transformation

Related challenges, questions, weaknesses and or developmental areas identified in working groups:

- Responding to the increased interest in spirit in today’s society
- How do we ensure the “transformative” quality and effect of ICA?
- Weaving together “spirit” and “economics” and working together

E. Addressing the individual/organizational losses and impacts of staff lay-offs

Related challenges, questions, weaknesses and or developmental areas identified in working groups:

- Need for healing, recovering and/or mourning and accepting losses related to staff lay-offs
- Loss in personal relationships
- Loss of “brain trust” resources
- Hurt, anger and defensiveness floating around
- Warring camps within the organization/network
- Differences among and between groups
- Fear of “retribution”
- Incomplete information
- Sense of entitlement because of stipend history, volunteer time and reparations

F. Informal mechanisms for preserving, accessing and building on collective ICA wisdom

Related challenges, questions, weaknesses and or developmental areas identified in working groups:

- Making archives useful, accessible through “google-ability” etc.
- “Mean” age of “heritage” people
- No ways to keep passing the wisdom to future generations
- Need clarity on intellectual property – what does everyone own?
- No process for incorporating new courses and programs into curriculum

G. Unclear long-term model for ICA programming and resources

Related challenges, questions, weaknesses and or developmental areas identified in working groups:

- Need a new story of who we are and where we are going
- Identifying and supporting “Signature” programs
- How to re-engage people as donors?
- Need more money but there is no model for bringing money in
- Programs weren’t funded
- Sustainable development

H. Disrupted support structure for program delivery

Related challenges, questions, weaknesses and or developmental areas identified in working groups:

- Inconsistent mentoring after courses; gap in quality control
- Support for staff is a developmental area
- Need clarity on intellectual property – what does everyone own?

Advice



What does ICA-USA need to do to support, serve and/or be an integral part of emerging/existing change networks?

A. *Identify, develop and mobilize “signature” programs and initiatives* (11 advice proposals)

Specific advice from LL Event working groups:

1. *Develop* capacity and platform for ICA–USA “webinars” on a regular schedule and options for “organic” use by anyone on site
2. *Commission* skilled individuals to create “life transforming events” (e.g. the new RSI, ITP, GFM) so that change networks have powerful staff to run them
3. *Focus* ICA-USA on creating cultures of participation and engagement through the ToP Program
 - *Continue* ToP methods training and development including applications, expanding best practices
 - *Build* a national marketing effort
 - *Activate* a ToP Training for Trainers from a central location to expand ToP in more states
 - *Conduct* conciliation and co-planning activities with ToP trainer network
 - Continue to improve relationships with the ToP network
 - Develop a 5 year vision for and with the ToP network
4. *Develop* a project and secure funds for an early learning network
 - Conduct a national fundraising effort
 - Establish a mission fund/grant program that provides matching grants for demonstration projects
 - Quantify long range goals
5. *Collaborate* with other national non profit organizations for Learning Basket program delivery
6. *Have* ICA–USA develop a national discourse program and secure a major fund partner to underwrite the national discourse delivery
7. *Develop and fund* innovative programs that can be utilized by many
 - Collect data, demographic information, etc. that would be reviewed by a team to identify
 - Develop funding.
8. *Develop and enforce* distinct ICA branding that is unique in the change network community
9. *Create* signature programs
10. *Broadly distribute* signature programs
11. *Utilize and optimize* and engage connections within CRC building

B. *Build communication and engagement structures to broaden participation* (8 advice proposals)

Specific advice from LL Event working groups:

1. *Symbolize* the new ICA–USA
2. *Enlist, support and involve* the membership and *network* USA organizations and individuals
3. *Recruit* volunteers intentionally
4. *Have* a real web presence so we get “found” by people looking for our skills
5. *Build* structures for engagement
 - Set up structure(s) and direct ways for individuals and groups to relate to ICA–USA
 - Open doors for volunteers
 - Answer the question “How can I engage with... money, time, skills”
 - Reorganize ICA and EI as a membership-based nonprofits
 - Assure open communication by all
 - Launch regular communication and interaction with staff and the network
 - Get all staff in place
 - Monthly staff reports
6. *Develop* an orientation/organizational history program
7. *Create* ways to invite people to participate in ICA
8. *Utilize and optimize* and engage connections within CRC building



What does ICA-USA need to do to support, serve and/or be an integral part of emerging/existing change networks?

C. Enhance/revive a focus on human spirit and transformation in programs/operations (7 advice proposals)

Specific advice from LL Event working groups:

1. *Assure* that transformative spirit quality of engagement is not lost
2. *Create* a contemporary story including change agent stories
3. *Listen* to Eastern Wisdom about living with “both – and” not “either – or”
4. *Provide* spiritual support for ICA–USA
 - Staff
 - Volunteers
 - Networks
5. *Commission* skilled individuals to create “life transforming events” (e.g. the new RSI, ITP, GFM) so that change networks have powerful staff to run them
6. *Activate* EI with programs including the archives, research, books, international programs, building, etc.
7. *Make* archives “google-able”

D. Resume research efforts that inform and impact community and societal issues (7 advice proposals)

Specific advice from LL Event working groups:

1. *Convene* regular research-oriented gatherings
2. *Get* a place at the table for national policy. This means having a designated spokesperson
3. *Activate* research networks and conduct collective research as intensely as we once researched the Social Process Triangles
4. *Have* ICA–USA develop a national discourse program and secure a major fund partner to underwrite the national discourse delivery
5. *Focus* on 1 – 2 issue priorities
6. *Create* few comprehensive screens (helping people connect the dots)
7. *Make* knowledge relevant – bleed the meaning out of current information overload

E. Use modern technology to support effective internal and external operations (6 advice proposals)

Specific advice from LL Event working groups:

1. *Develop* capacity and platform for ICA–USA “webinars” on a regular schedule and options for “organic” use by anyone on site
2. *Make* archives “google-able”
3. *Use the web to create* a contemporary story including change agent stories
4. *Have* a real web presence so we get “found” by people looking for our skills
5. *Participate* officially in web-based communication
6. *Upgrade and maintain* website
 - *Include* stories and dialogue
 - *Compile* and maintain relevant data
 - *Assure* open communication by all
 - *Exchange* monthly reports
 - *Create* visual symbol of ICA network



What does ICA-USA need to do to support, serve and/or be an integral part of emerging/existing change networks?

F. Use face-to-face interaction a preferred way to communicate and collaborate (6 advice proposals)

Specific advice from LL Event working groups:

1. Active follow-up to the Living Legacy Event dialogue
2. *Symbolize the new ICA-USA*
3. *Meet the Diaspora face-to-face.* We are still “in-person” in our operations
Diaspora = A dispersion of a people from their original homeland and/or the community formed by such a people; A dispersion of an originally homogeneous entity, such as a language or culture)
4. *Hold* regionally sponsored events for visits by board and staff
 - Extend “face to face” exposure of ICA-USA staff and Board to the “*Big We*”
Get staff out to the networks
All ICA USA staff and board members to Japan 2008
 - Conduct conversations with ICA-based regional organizations
 - Establish a communication tree via phone and e-mail
 - Organize periodic conferences around specific focus topics; Host national dialogues on social issues
5. *Convene* regional gatherings to elicit corporate wisdom and recruit for the 2008 International Conference in Japan
6. *Share* “approaches that work” nationally --ToP trainings and other projects

G. Develop and clarify ICA-USA’s governance/management values, roles and processes (6 advice proposals)

Specific advice from LL Event working groups:

1. *Assess* organizational readiness to set up and follow a governance/management structure
2. *Create* institutional roles that allow us to clear uncomfortable issues
3. *Listen* to Eastern Wisdom about living with “both – and” not “either – or”
4. *Expand* EI and ICA Boards with member representation selected by constituents
5. *Recruit* staff, board, volunteers, trainers with diversity in mind including age and ethnic diversity
6. *Symbolize the new ICA-USA*

H. Strengthen ICA-USA and ICAI Partnership (4 advice proposals)

Specific advice from LL Event working groups:

1. *Establish and expand* creative relationship with ICAI
2. *Convene* regional gatherings to elicit corporate wisdom and recruit for the International Conference in Japan 2008
3. *Coordinate* fund raising with ICAI
4. *Strengthen* relationships with ICAI



What does ICA-USA need to do to support, serve and/or be an integral part of emerging/existing change networks?

I. Develop effective working agreements (3 advice proposals)

Specific advice from LL Event working groups:

1. *Have* clear formal statements on legal relationships and rules:
 - With other networks
 - Related to ownership and copyrighting of materials
2. *Design* agreements to establish formal relationships with existing ICA network/city partnerships
 - Such as the Uptown Chamber and active network groups in North Carolina, Troy, Minneapolis, Denver, Seattle, Albuquerque, Greensboro, Asheville, Phoenix, Coquito, Georgia etc.
 - Develop legal agreements that clarify relationships; consider using Canadian model for intellectual property rights to head us in same direction
3. *Create* a memorandum of understanding for delivering ICA programs by local groups, national networks and major organizations

J. Demonstrate fiscal responsibility and establish a sustainable revenue base (3 advice proposals)

Specific advice from LL Event working groups:

1. *Provide* an economic basis for ICA – USA by:
 - Establishing a broad donor base
 - Creating a sustainable program delivery model
 - Pricing courses appropriately and/or flexibly in order to enable as many as possible to participate
2. *Articulate* what is our economic model
 - Have the conversation about open source versus proprietary profit
 - Determine where revenue stream can/will be generated
3. *Be* the pioneering standard of change network organizations that operates with fiscal **responsibility**

K. Reconcile and heal relationships in order to go to places that are better than now (3 advice proposals)

Specific advice from LL Event working groups:

1. *Conduct* a formal, facilitated conciliation process
2. *Facilitate* reconciliation, expose existing lines of communication and systematize. *Employ* inclusive, accepting language
3. *Create* institutional roles that allow us to clear uncomfortable issues

Advice Debriefing



The SHIFT:

What are we moving *from* and *to*?

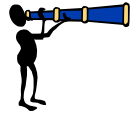
- *From* being told the future *to* defining the future
- *From* illusion *to* reality
- *From* a storm on the lake *to* a sign of dawn
- *From* bewilderment *to* hope
- *From* dark *to* light
- *From* confusion *to* “aha!”
- *From* confused *to* slightly less confused
- *From* a full pantry and refrigerator *to* making the meal
- *From* the Year of Discernment *to* waiting to see what emerges
- *From* fear *to* life is good

The FEARS and FASCINATIONS

As you look toward the future, what are your fears and fascinations?

- *Fascination* about the story we will come up with and *fear* about finding the money to enact the new story
- *Fascination* about getting advice out and *fear* about how it will be used
- *Fear* about not being able to change and *fascination* that we possibly could
- *Fascination* with the new staff and *fear* that we won't give them time and space to develop the organization
- *Fascination* with the tendency for policy-makers to not consult with people and *fear* about whether the disestablished find a place at the table
- *Fascination* with the invitation of the ICA-USA Board to be involved in policy and *fear* that no action will be taken to make that happen
- *Fear* of losing some of the past heart of the people and *fascination* about working in fiscal responsibility
- *Fascination* with the possibility of getting involved in national policy issues and *fear* of a decision not to make it happen
- *Fascination* with the depth and breadth of ideas at this table and *fear* of not really accomplishing things
- *Fascination* with the magic of face to face energy and *fear* of getting lost in the web world
- *Fascination* with the important actions that programs could create among people; *fear* that the focus will be on what is created vs. people
- *Fascination* with the fact that we are all ex-ICA except for the staff who are learning what ICA-USA is
- *Fascination* with the hopes, dreams, caring and wishing and *fear* about where the money will come from
- *Fear* of the remarkable difference in our time frames, work and perspectives and *fascination* with the remarkable unanimity we have
- *Fear* that we will lose some vision due to pigeonholing and *fascination* with the possibility of really working together in new ways
- *Fascination* with the hopes and dreams and *fear* of the cynicism that can overtake everything

Closing Reflection



Personal HIGHLIGHTS...

What for you was a highlight, insight, or hindsight of our work in the past two days?

Representative discussion comments:

- The party
- Singing songs
- Seeing books I didn't know were written
- Betty Pesek's book and journey as depicted in the chronology of her life
- Experiencing the facility
- The many common elements in the brainstorm reports of the six working groups
- Photos with audience-written captions at the celebration
- Meeting the people
- Seeing old colleagues and meeting new ones
- World of Human Development film
- The "green tree" symbol used in the grouping of the advice
- Watching skilled facilitation and changing strategy
- Meeting the new staff and seeing the faces of those on the Board
- Tai Chi early in the morning led by Ruth Gilbert
- Dick Alton's presence; he worked on the initial *Living Legacy Event* starting in 2005
- Reflecting on what we are moving From- To and see where people are standing – it was very affirming
- The strange black and white film (*Ecumenical Institute* documentary program on TV) just after seeing "The War" documentary by Ken Burns and reading the book about Joe Mathews
- Bursts of laughter revealing a shared sense of humor
- Executive Director Nino's welcome comments
- Meeting Nino's wife
- Carolyn's summary of the last 16 months
- Ken's summary "Since the beginning of time" to consciousness

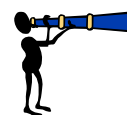
REVELATIONS about the future...

A familiar adage claims that "the future is more or less clear at every moment." At this moment, what would you say is clear or less clear regarding the network organization?

Representative discussion comments:

- Operating on consensus decision-making all the time vs. giving and getting advice. A helpful shift in images
- Doing things on behalf of others. Maybe we did not have everyone that was needed here and maybe that is still something we need to do, but we did our best to work on behalf of the whole network
- ICA-EI has always lived by events. If I were to ever write a book it would be about "management by events." I think it will be important to continue building the future in events that involve groupings of people
- The future of the organization is unclear but there is clearly a lot of hope
- The legacy is alive and well in the network
- Something called research is going to happen
- What is need is clear, how is not clear; advisory council – not optimistic on how.
- Unclear about where the ICA is going but clear about the need for courage and joy of living dangerously – the concept of fear and fascination

Closing Reflection Continued



On DISCERNING...

The weekend was billed as “The Living Legacy Event - *“Discerning a vibrant legacy for today and the future.”* What would you say to those who will ask you – so what did you discern?

Representative discussion comments:

- Reached back farther into history in order to move forward in ways which will take us further
- Quality of the organization form is in question within the context of vibrant community – have more emphasis have on form
- Relationship of the Order, EI and ICA not worked out – We all recognize them to be from the same base
- “Best practices”; never really understood the focus on Secondary integrity etc. I would have screamed but it would have resulted in confusion so surface not seen smoothly. I hope that what we mean by “Best Practices” allows the underneath and surface to look alike
- Eclectic group from wide diversity of places – not who we were but who we want to be moving forward
- Not hear the EI/Order referred to in years. We had something important; a connection to the things were and are it is easier to move into the future – organization goes on cyclical journeys
- Organization form/eclectic group/ jargon that cause confusion – Saving the hope that this new day brings transparency; being transparent is important to the future - not back room decision-making or selective communication is not acceptable
- Same spirit of openness, respect for differences, willingness to go in directions we had come in with and not pushing an agenda

Insights about PROFOUND VOCATION...

How did our dialogue and analyses inform you of “Profound Vocation” in these times?

Representative discussion comments:

- I know that I am doing what I was born to do. All was training for this moment
- Doing the necessary deed; most of the time I don’t have the energy for that, most of the time not the courage for that, it comes at great cost; when step back to create space, something appears. I like to do things perfectly – I am a type A person to the hilt; All my life this has caused me a lot of trouble. In the midst of all that, there has always been a colleague – a team – to support and show the way. I am nurtured in the midst of this community – come hell or high water – I have been able to stand tall (don’t ask me how I stand tall
- I continually conclude in discussions with my husband that we continue to fail retirement – but you are clearly succeeding at re-firement
- When I experience myself in the junction between the external and the world of spirit; and know that that is what the world needs; seeing it reflected in lives of those around me
- Profound vocation is not the stuff I want to leave behind but what I want to take with me
- Profound vocation – totally perplexed about that – I can talk about a profound jigsaw puzzle; I do partition/ all the other stuff that is there
- Shirley Heckman Snelling is my image of profound vocation after hearing all the stories and qualities during her birthday conversation,

GLOSSARY OF INITIALS

EI – Ecumenical Institute

CRC – Community Resource Center – at 4750N.
Sheridan Road

ED – Executive Director

GFM – Group Facilitation Methods

ICAI – Institute of Cultural Affairs International

IToP – International ToP Training of Trainers

ITP – International Training Program

LL – Living Legacy

OE – Order Ecumenical

RS-1 – Religious Studies 1 – a course offered by EI

ToP – Technology of Participation

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