



From: Jeremy DeRoo, CEO
To: Dwelling Place Board
Date: October 4, 2021
RE: Strategic Planning for Dwelling Place

As Dwelling Place moves into its next strategic planning process, the CEO and Executive team will be seeking consultant services to assist us. Before soliciting proposals, we would like to discuss the idea of using this planning process to clarify “Why does Dwelling Place exist?” and how this “why” informs “How do we go about doing the work?” By contrast, the previous process focused heavily on “What will the work be?”

The expansion beyond the “what” is partly because work has already been performed to establish directionality here. The current strategic plan (Dwelling Place 2019-2022 Strategic Plan approved 8-7-19 [CEO Goals 2019 2020.pdf \(thirdsectorcompany.com\)](#)) establishes 4 primary priorities for the organization: Growth, CEO Succession Planning, Greater Community Awareness, and Staff Training and Development. The CEO succession, recruitment, and onboarding process appears to have generally affirmed these priorities, adding DEI as an additional priority and expanding CEO Succession to include succession planning for board and staff. This work appears to have laid a strong, practical foundation on which to build the 2023-2026 strategic planning process.

While this work established a strong foundation of what the work of the organization will be going forward, the departure of the long-term CEO does pose a significant change to the organization that is worth strongly considering during this strategic planning process. The transition of a long-term CEO creates an opportunity for the entire board and organization to broadly transfer and more intentionally hold the values and vision of Dwelling Place. A process designed around this opportunity would not necessarily result in changing the stated mission or vision of the organization, but would instead work to more intentionally articulate the organization’s values and purpose in a way that ensures a shared understanding of what these terms mean. In doing so, we can establish a language and framework that can improve communication and facilitate board and CEO decision making going forward.

If there is general agreement on the expanded emphasis for strategic planning this time around, the Executive Committee, working with the CEO, will work to secure a consultant to facilitate this overall process. The CEO, working with staff through existing committees, will likely develop measurable outcomes around the current strategic plan’s growth areas while the consultant guides both the board and staff through the identity-articulation process. This should allow us to accomplish both above-the-line and below-the-line planning during 2022.

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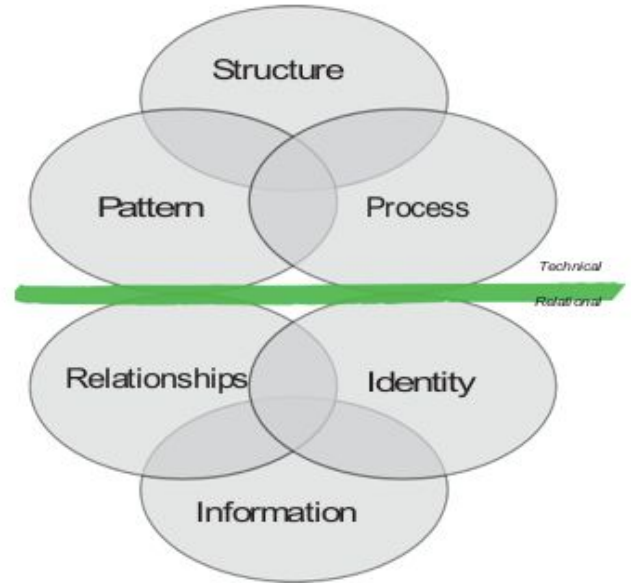


THE SIX CIRCLE MODEL

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The “hallucination” was that if you changed the structure of the organization – assigned people to have the primary responsibility for a key initiative – the organization would then respond to the change. Additionally, the thinking was that if you designed explicit processes that detailed out every step to of a change process, people would willingly respond and create the desired change.”

-Steve Zuieback and Tim Dalmau



Above the Green Line

Pattern (Strategies)	Structure	Process (Operations)
The systematic ways in which a system focuses its key strategies to accomplish its mission and goals.	The way a system organizes itself to conduct its work.	The standard processes (operations) that are used to build consistency and efficiency.

These three areas are absolutely essential but not sufficient to bring about and sustain change. Unfortunately, many leaders believe and operate as if these are the only components of work to bring about and support organizations and change efforts.

Below the Green Line

Relationships	Information	Identity
It has to do with how a team or organization values its people – their emotional, physical and spiritual well-being; The level of connectivity among people across the system; the value placed upon collaboration and high functioning teams; and the level of connectivity of and the type of relationship between key teams, programs and operational systems.	Information is like oxygen in a system. In its absence, people will “make it up” in an effort to keep moving forward. Access to information greatly minimizes the negative rumors. When information is abundant, people focus on what is important and have greater security in knowing what is actually going on in the organization.	Human beings are meaning-seekers. Our actions are completely driven by our own set of values, beliefs and sense of identity. Therefore, shared purposes and principles of people in teams motivates individuals to work together in organizations.

All three areas are completely interconnected. In some ways information is like the vital nutrients for the living system, relationships are the conduits to infuse nutrition throughout the system and the identity is the concept or framework (mind) that organizes the system into a unique entity. All three are essential to the well-being of the whole.

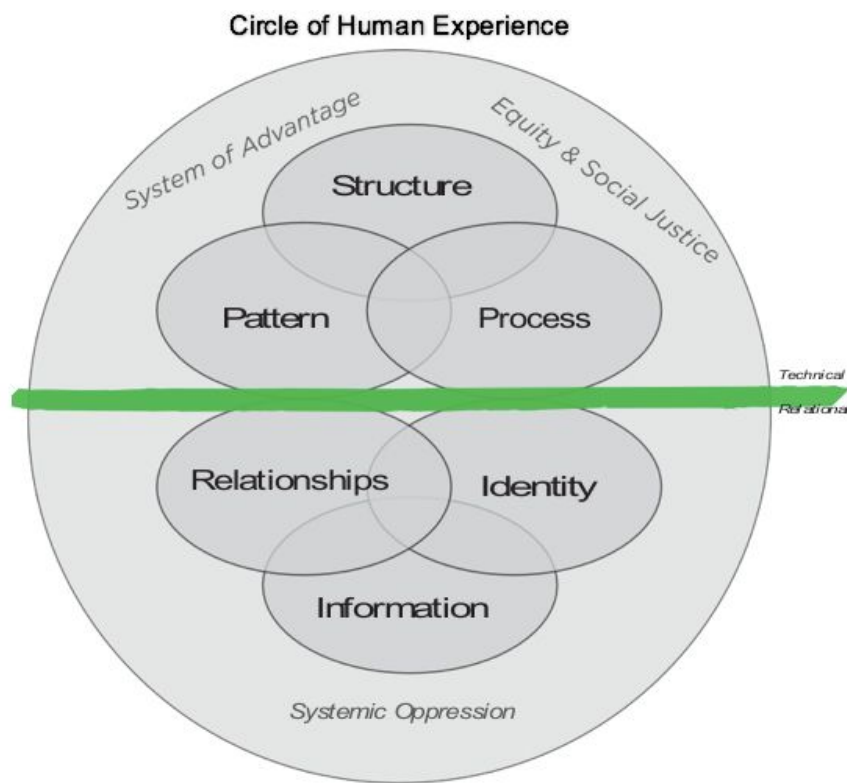
THE SIX CIRCLE MODEL

Circle of Human Experience

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As a leader for equity, the Six Circle model can also be envisioned as a Seven Circle model. This model recognizes that systemic oppression exists and negatively affects the dynamic interplay of working above and below the green line.

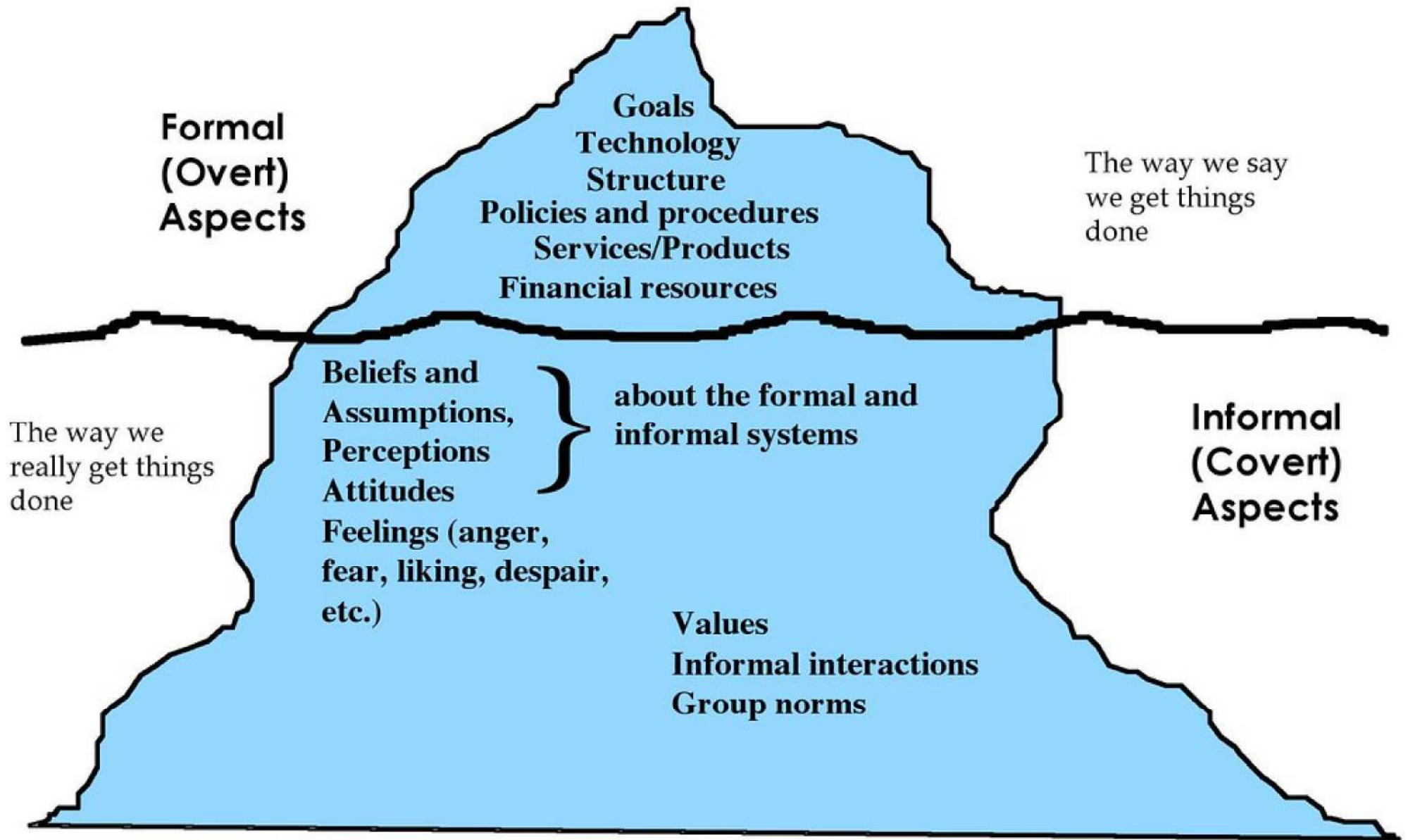
In the Six Circle Model, all six circles are important to creating organizational success. Traditionally the greatest amount of attention has been focused on the top three circles. Working within this framework allows us to see the critical and interdependent impacts of people as reflected by the bottom three circles. This is especially true as groups seek to understand how bias, conscious and unconscious, may be impacting teaching and learning at the individual, institutional and structural levels - the seventh circle.



Some questions to inform your use of the Seventh Circle:

- Who are the people affected by the current inequity being discussed?
- What historical patterns (around race, class, language, etc.) may be informing the dynamics in this context?
- Who has power here? What is power based on here? Who is at the table?
- How are oppression, internalized oppression and transferred oppression playing out right here, right now? (In this school, in this group, in this organization, in this district?)
- How safe is it here for different people to share their truth?
- What are the potential unintended consequences of our proposed solutions/actions? Do the proposed solutions ignore or worsen existing disparities for the group in which we are focused?

Cultural Iceberg



Created by Stanley N. Herman. TRW Systems Group, 1970