

Strategic Planning for Americans for Indian Opportunity

Prepared for:
AIO Board Members

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BACKGROUND

AIO conducted a staff retreat August 22-24 at the Pobalamos in ABO, New Mexico. The purpose of the retreat was to initiate a strategic planning effort with the participation of AIO staff, primarily. The intent of this effort is to make AIO a more sustainable organization capable of making measurable progress towards achieving its mission, which in turn will benefit indigenous peoples and communities. On account of the variety of activities that AIO is engaged, it was determined that an alignment of goals, strategic directives and specific administrative actions will enhance the effectiveness and efficiency of the organization, especially as it embarks on a new era of leadership in the international arena. In light of the ever-increasing competition for funding, AIO believes that it is critical to develop, with the participation of some of its stakeholders, a strategic plan that will act as a roadmap, guiding the programmatic and administrative operations of the organization in its future initiatives.

Utilizing AIO's Indigenous Leadership Interactive System (ILIS™), Dr. Alexander Christakis, President of the Institute for 21st Century Agoras (www.globalagoras.org), facilitated the strategic planning retreat. Participants to the retreat included LaDonna Harris, President; Laura Harris, Executive Director; Ron Martinez Looking Elk, International Public Relations and Development Specialist; Mary Lucero, Administrative Assistant; Sonya Gavin, AIO Senior Fellow-Fund Development; Amanda Cobb, AIO Senior Fellow and AIO Board member; and James Lujan, AIO Senior Fellow-Videographer and Official AIO Archivist.

STRATEGIC PLANNING PROCESS

Prior to their participation in the interactive session with the ILIS™ methodology, the stakeholders were asked to review recommendations about AIO's future produced in a variety of gatherings, such as the 2000 Native Leaders Conclaves in Washington, DC, and in New Mexico, and a few others (see Appendix A). The AIO Board of Directors has endorsed most of these recommendations. It was decided to allocate the necessary

time to ensure that the meaning and intentionality of all of the 27 recommendations were understood by the participants of the strategic planning session. The twenty-seven recommendations were divided into two categories. The first category is shown in Table 1 and contains eight goals. The second category is shown in Table 2, and contains nineteen strategic directives. Approximately two hours were allocated to the discussion for clarification of the recommendations appearing in **Table 1: AIO Goals Endorsed by the Board**, and **Table 2: Strategic Directives Endorsed by the AIO Board**.

Table 1: AIO Goals Endorsed by the Board

- (1 - Goal) STRONG INDIGENOUS COMMUNITIES THROUGH CULTURALLY VALUE-BASED LEADERSHIP DEVELOPMENT
- (2 - Goal) THE ELMA PATTERSON RESOURCE CENTER OF INDIGENOUS KNOWLEDGE TO INCREASE THE INFORMATIONAL AND EDUCATION RESOURCES THAT ARE AVAILABLE TO NATIVE COMMUNITIES AND TO EDUCATE AMERICANS ABOUT CONTEMPORARY INDIGENOUS PEOPLES
- (3 - Goal) BROADER AND DEEPER IMPACT BY THE AMERICAN INDIAN AMBASSADORS PROGRAM
- (4 - Goal) INDIGENEITY AND AIO'S PHILOSOPHY REGARDING CULTURAL VALUE-BASED PRO-ACTIVE AND INTERACTIVE LEADERSHIP IS SHARED MORE BROADLY THROUGH STRONG RELATIONSHIPS AND PARTNERSHIPS WITH INDIGENOUS PEOPLES WORLD-WIDE
- (5 - Goal) AIO HAS A NATIONAL AND INTERNATIONAL EDUCATIONAL ROLE IN SHAPING PUBLIC OPINION AND GOVERNMENTAL POLICY REGARDING INDIGENOUS ISSUES
- (6 - Goal) STRONG NON-PROFIT SECTOR IN INDIGENOUS COMMUNITIES
- (7 - Goal) A GREATER PRESENCE AND VISIBILITY FOR AIO
- (8 - Goal) MORE PARTNERSHIPS, INNOVATIVE PROBLEM SOLVING, AND CONTEMPORARY INSTITUTIONS ARE BUILT BASED ON TRADITIONAL VALUES AND WISDOM

Table 2: Strategic Directives Endorsed by the AIO Board

- (1 - Directive) BUILD A NATIONAL NETWORK OF EMERGING NATIVE LEADERS BY CONTINUING TO CONDUCT THE AMERICAN INDIAN AMBASSADORS PROGRAM, SELECTING A NEW CLASS EVERY TWO YEARS
- (2 - Directive) BECOME THE "SOURCE" FOR LEADERSHIP IN TRIBAL AMERICA BY SERVING AS A NETWORK HUB, REFERRAL SERVICE AND CLEARINGHOUSE FOR INDIGENOUS PROFESSIONALS
- (3 - Directive) CREATE PRACTICAL TOOLS TO DISSEMINATE LESSONS LEARNED, BEST PRACTICES, AND SKILL-BUILDING TECHNIQUES FOR LEADERSHIP AND COMMUNITY DEVELOPMENT
- (4 - Directive) PRODUCE DOCUMENTARIES ON INDIGENOUS LEADERSHIP
- (5 - Directive) DOCUMENT STORIES OF SUCCESSFUL NATIVE LEADERS LIKE THE AMBASSADORS AND PROGRAM ADVISORS
- (6 - Directive) PARTNER WITH ACADEMIC INSTITUTIONS SUCH AS HARVARD, UCLA, UNM AND OTHERS ON STUDIES, RESEARCH, AND OTHER PUBLICATIONS REGARDING INDIGENEITY AND OTHER NATIVE ISSUES
- (7 - Directive) EVALUATE AND MEASURE THE IMPACT OF THE AMBASSADORS PROGRAM ON INDIVIDUALS, COMMUNITIES AND TRIBAL AMERICA AS A WHOLE
- (8 - Directive) STRENGTHEN THE AMBASSADORS NETWORK BY DEVELOPING AN AMBASSADORS ALUMNI ASSOCIATION AND OTHER PROGRAMS
- (9 - Directive) DEVELOP AND IMPLEMENT AMBASSADOR PROGRAM OUTREACH / RECRUITMENT INITIATIVES THAT ARE AIMED AT SPECIFIC STATES / REGIONS AND TRIBES
- (10 - Directive) FORMALLY DOCUMENT AND DISTRIBUTE AIO'S RESEARCH AND DEMONSTRATION OF LEADERSHIP DEVELOPMENT
- (11 - Directive) TRANSLATE THE AIO CONCEPT AND MODEL OF LEADERSHIP DEVELOPMENT INTO SPECIFIC PRACTICES THAT CAN FOSTER INSTITUTIONAL CHANGE IN DIFFERENT SECTORS
- (12 - Directive) REPLICATE COMPONENTS OF THE AMBASSADORS PROGRAM INTO NEW AND EXISTING AIO INITIATIVES
- (13 - Directive) BUILD WRITTEN AMBASSADOR PROGRAM CURRICULUM AND PROCESSES THAT CAN BE SHARED WITH OTHERS
- (14 - Directive) DEVELOP AND IMPLEMENT A MODEL TWO-YEAR CAPACITY BUILDING PROGRAM FOR EMERGING INDIGENOUS LEADERS FROM THE US AND AOTEAROA (NEW ZEALAND) WHO WILL WORK TOGETHER IN A TRANSNATIONAL ALLIANCE TO IMPROVE THE QUALITY OF LIFE FOR INDIGENOUS COMMUNITIES WORLDWIDE
- (15 - Directive) DEEPEN FEDERAL GOVERNMENT'S UNDERSTANDING OF TRIBAL GOVERNMENTS AND THEIR ROLE IN THE U.S. FEDERAL SYSTEM OF GOVERNMENTS
- (16 - Directive) GARNER BENEFICIAL MEDIA ATTENTION FOR NATIVE ISSUES AND FOR AIO
- (17 - Directive) COLLABORATE WITH NATIVE AMERICANS IN PHILANTHROPY
- (18 - Directive) CONDUCT PRESENTATIONS FOR PROFESSIONAL ASSOCIATIONS, PARTICIPATE ON THE BOARD OF OTHER ORGANIZATIONS, ATTEND AND PARTICIPATE IN CONFERENCES
- (19 - Directive) CONVENE INDIGENOUS LEADERSHIP (AMBASSADORS / ADVISORS) ON A REGULAR BASIS TO GRAPPLE WITH THE ISSUES OF DEEPEST SIGNIFICANCE TO INDIGENOUS PEOPLES

PARTICIPANT FINDINGS

Following the clarification of the meaning of the 8 goals and the 19 strategic directives the strategic planning participants performed structural analyses and constructed patterns of meaning among the 29 recommendations by the AIO Board. By means of focused and open dialogue, in a mode similar to their ancestors, they produced three interesting relational patterns, shown in Figures 1, 2, and 3 in the following sections. The structural analysis and dialogue among the participants was supported by a software package, as described in Appendix B. For more information about the methodology and the computer software, the readers of this report are advised to visit www.CWALtd.com.

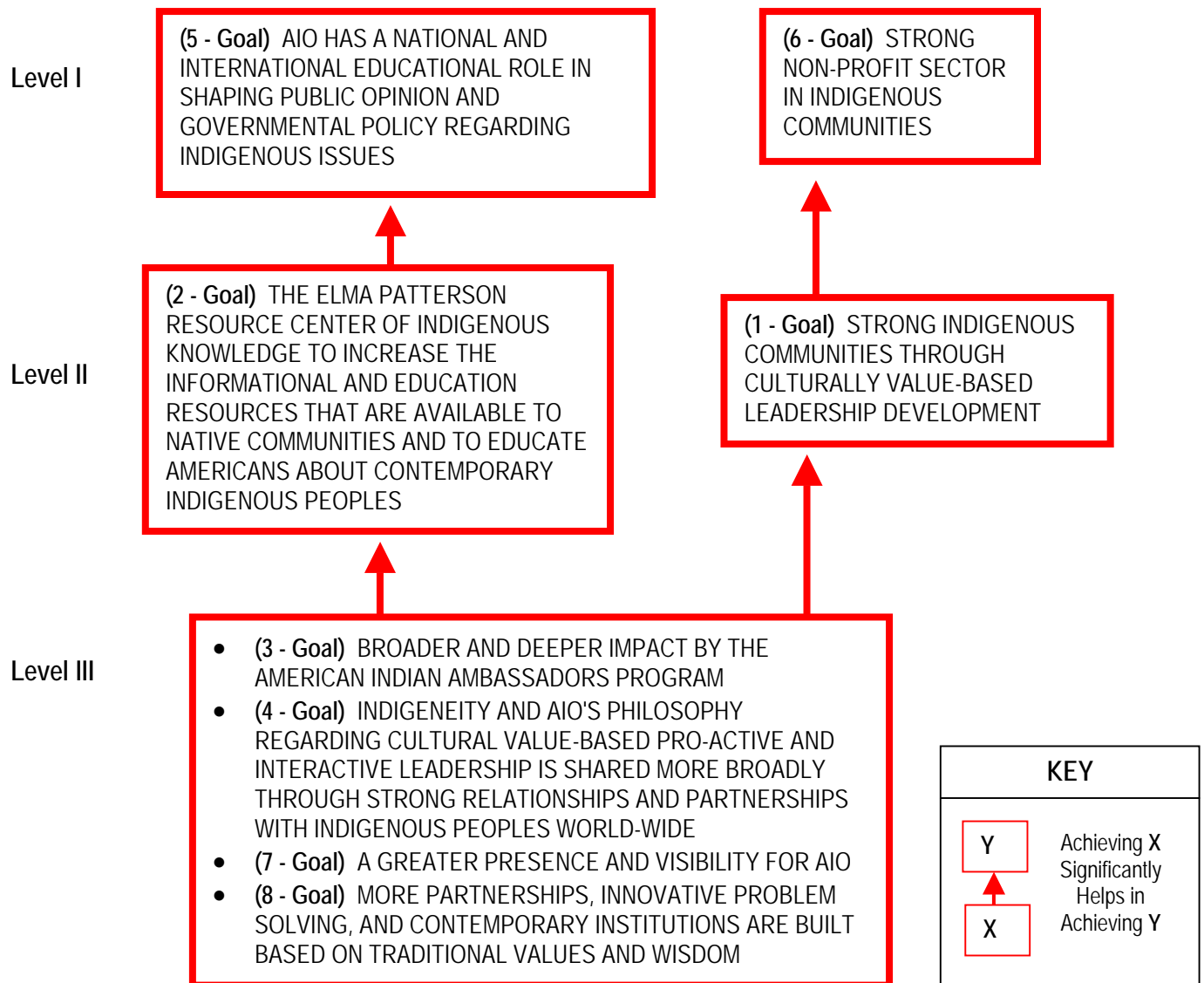
In the following sections we will discuss and interrelate those structural patterns and discuss their implications for the future of the AIO.

Influence Tree Pattern among Goals

The first pattern produced by the participants in performing the structural analysis is shown as **Figure 1: Influence Pattern Among AIO Goals**. This tree-like pattern (see next page) displays the influence relationship among the eight goals. Those goals appearing at the lower levels (the roots) of the tree-pattern influence those at the higher levels (the branches). The interpretation of the arrows shown in Figure 1 is “making progress in achieving **Goal-X** will help the stakeholders SIGNIFICANTLY in achieving **Goal-Y**.” The four goals shown at level III of Figure 1 are in a **cycle of mutual influence**, namely making progress in achieving **Goal #3: Broader and deeper impact by the American Indian Ambassadors Program** will help significantly in achieving the other three goals appearing at the root of the tree in a box with bullets in front of them, and vice versa. In essence Figure 1 tells us that the four goals in the cycle at Level III of the tree exert significant supportive influence to all of the remaining goals. The implication of this discovery is that, if the stakeholders were able to make progress in achieving these four goals at the roots of the tree, they will be able to make significant progress in achieving practically all the other goals recommended by the AIO Board. These four goals are:

- Broader and deeper impact by the American Indian Ambassadors Program;
- Indigeneity and AIO’s philosophy regarding cultural value-based pro-active and interactive leadership is shared more broadly through strong relationships and partnerships with Indigenous peoples world-wide;
- A greater presence and visibility for AIO;
- More partnerships, innovative problem solving, and contemporary institutions are built based on traditional values and wisdom.

Figure 1: Influence Pattern Among AIO Goals



As stated earlier it is important to remember that the above goals exert strong leverage in the context of the AIO strategic planning vision and that they also are mutually reinforcing, namely achieving any one of the four will support the achievement of the other three in the cycle.

Field Pattern among Strategic Directives

Following the discovery of the roots of the tree of goals, the participants worked on discovering which of the strategic directives identified in Table 2 would impact strongly the roots of the tree presented in Figure 1. Through a similar disciplined dialogue as in the construction of Figure 1, they were able to identify the fourteen strategic directives, out of a total of 19 shown in Table 2, which are capable of exerting a positive impact in the achievement of the four most influential goals at the roots of the tree of Figure 1. The adoption and implementation of those fourteen strategic directives, all of which have been endorsed by the AIO Board, will enhance the capacity of AIO to make progress toward the achievement of its vision as described in Figure 1.

The next pattern the participants constructed is a classification of the fourteen strategic directives with the highest impact in achieving the vision in 5 distinct clusters, as shown graphically in Figure 2. These 5 clusters emerged from a dialogue exploring the similarities and differences of the meaning of these fourteen strong impact recommendations of the Board of Directors. The participants also proceeded to assign labels to each of the 5 clusters. This labeling represents an attempt to capture the essence of the meaning of a particular cluster. For example, the label for Cluster #2 is **Redistribution**. Seven of the 14 recommendations have been classified under this Cluster, making it the cluster with the largest number of observations. The label for Cluster #5 is **New AIO**. Only one observation has been assigned to this Cluster. For more details the reader is advised to review all five clusters of Figure 2.

Figure 2: Classification of Strategic Directives Determined as Being the Most Influential

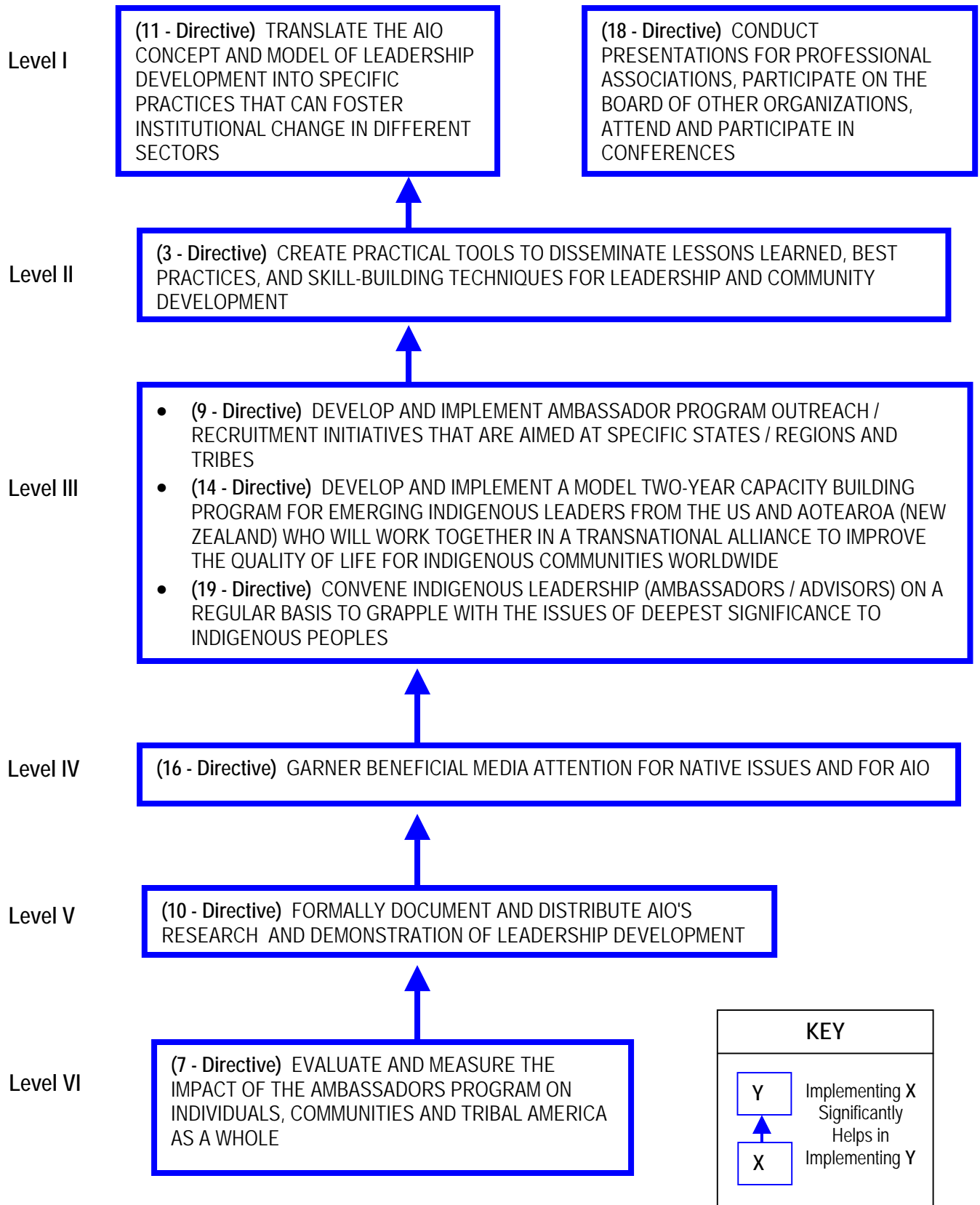
CLUSTER #1: CONTINUATION OF AMBASSADOR PROGRAM	CLUSTER #2: REDISTRIBUTION	CLUSTER #3: SHARING THE MESSAGE	CLUSTER #4: INDIGENEITY	CLUSTER #5: NEW AIO
<ul style="list-style-type: none"> ● (Strategic Directive – 1) BUILD A NATIONAL NETWORK OF EMERGING NATIVE LEADERS BY CONTINUING TO CONDUCT THE AMERICAN INDIAN AMBASSADORS PROGRAM, SELECTING A NEW CLASS EVERY TWO YEARS ● (Strategic Directive – 8) STRENGTHEN THE AMBASSADORS NETWORK BY DEVELOPING AN AMBASSADORS ALUMNI ASSOCIATION AND OTHER PROGRAMS ● (Strategic Directive – 9) DEVELOP AND IMPLEMENT AMBASSADOR PROGRAM OUTREACH / RECRUITMENT INITIATIVES THAT ARE AIMED AT SPECIFIC STATES / REGIONS AND TRIBES 	<ul style="list-style-type: none"> ● (Strategic Directive – 3) CREATE PRACTICAL TOOLS TO DISSEMINATE LESSONS LEARNED, BEST PRACTICES, AND SKILL-BUILDING TECHNIQUES FOR LEADERSHIP AND COMMUNITY DEVELOPMENT ● (Strategic Directive – 4) PRODUCE DOCUMENTARIES ON INDIGENOUS LEADERSHIP ● (Strategic Directive – 5) DOCUMENT STORIES OF SUCCESSFUL NATIVE LEADERS LIKE THE AMBASSADORS AND PROGRAM ADVISORS ● (Strategic Directive – 7) EVALUATE AND MEASURE THE IMPACT OF THE AMBASSADORS PROGRAM ON INDIVIDUALS, COMMUNITIES AND TRIBAL AMERICA AS A WHOLE ● (Strategic Directive – 10) FORMALLY DOCUMENT AND DISTRIBUTE AIO'S RESEARCH AND DEMONSTRATION OF LEADERSHIP DEVELOPMENT ● (Strategic Directive – 11) TRANSLATE THE AIO CONCEPT AND MODEL OF LEADERSHIP DEVELOPMENT INTO SPECIFIC PRACTICES THAT CAN FOSTER INSTITUTIONAL CHANGE IN DIFFERENT SECTORS ● (Strategic Directive – 13) BUILD WRITTEN AMBASSADOR PROGRAM CURRICULUM AND PROCESSES THAT CAN BE SHARED WITH OTHERS 	<ul style="list-style-type: none"> ● (Strategic Directive – 16) GARNER BENEFICIAL MEDIA ATTENTION FOR NATIVE ISSUES AND FOR AIO ● (Strategic Directive – 18) CONDUCT PRESENTATIONS FOR PROFESSIONAL ASSOCIATIONS, PARTICIPATE ON THE BOARD OF OTHER ORGANIZATIONS, ATTEND AND PARTICIPATE IN CONFERENCES 	<ul style="list-style-type: none"> ● (Strategic Directive – 19) CONVENE INDIGENOUS LEADERSHIP (AMBASSADORS / ADVISORS) ON A REGULAR BASIS TO GRAPPLE WITH THE ISSUES OF DEEPEST SIGNIFICANCE TO INDIGENOUS PEOPLES 	<ul style="list-style-type: none"> ● (Strategic Directive – 14) DEVELOP AND IMPLEMENT A MODEL TWO-YEAR CAPACITY BUILDING PROGRAM FOR EMERGING INDIGENOUS LEADERS FROM THE US AND AOTEAROA (NEW ZEALAND) WHO WILL WORK TOGETHER IN A TRANSNATIONAL ALLIANCE TO IMPROVE THE QUALITY OF LIFE FOR INDIGENOUS COMMUNITIES WORLDWIDE

Influence Pattern among Strategic Directives

With the fourteen strategic directives organized in five clusters, the participants to the strategic planning session were asked to individually and subjectively select the five that in their opinion would be the most effective in accomplishing the vision of the AIO. Ten strategic directives emerged from the voting results as being of higher relative importance.

The third pattern produced by the participants through a structural analysis is Figure 3. This tree-like pattern displays the influence relationship among the ten strategic directives of higher relative importance. Those strategic directives appearing at the lower levels (the roots) of the tree-pattern influence those at the higher levels (the branches). The interpretation of the arrows shown in Figure 3 is “adopting and implementing **Strategic Directive-X** will help the stakeholders SIGNIFICANTLY in adopting and implementing **Strategic Directive-Y**.” The Strategic directive with the strongest leverage is shown at level VI of Figure 3, namely **Strategic Directive # 7: Evaluate and measure the impact of the Ambassadors program on individuals, communities and Tribal America as a whole**. By studying Figure 3 one sees that there are two other strategic directives that are also influential, which appear at Levels V and IV. These three strategic directives are close to the roots of the tree, and exert supportive influence to six out of the remaining seven strategic directives. The implication of this observation is that, if the stakeholders were able to adopt and implement the recommendations presented at Levels VI, V, and IV of Figure 3, they will be able to make significant progress in adopting and implementing practically all the recommendations assigned to the other clusters in Figures 2 and 3. The only recommendation from the Board that appears not to be connected to the roots of the influence tree, in accordance with the majority vote of the participants at the strategic planning session, is **Strategic Directive #18: Conduct presentations for professional associations, participate on the board of other organizations, attend and participate in conferences**.

Figure 3: Influence Pattern Among Most Important Strategic Directives



AUTHORS CONCLUSIONS

The authors of this report conclude that, on the basis of the structural analysis and the deliberations of the participants to the strategic planning session, it is essential to adopt and implement the three deepest strategic directives as displayed in Figure 3. These three strategic directives have emerged from the strategic planning work as the highest priority, requiring the allocation of energy and resources by the staff and the leadership of the New AIO. These highest leverage directives are:

- **Strategic Directive #7: Evaluate and measure the impact of the Ambassadors Program on individuals, communities and Tribal America as a whole (Level VI);**
- **Strategic Directive #10: Formally document and distribute AIO's research and demonstration of leadership development (Level V);**
- **Strategic Directive #16: Garner beneficial media attention for Native issues and for AIO (Level IV).**

Now that AIO has a more focused strategic alignment, the next steps will be to further flush out the strategic plan to include specific tactics, key staff, timelines and performance measures for achieving the highest leverage strategic directive. AIO will also need to assess its current organizational structure (staffing) and systems, and develop an implementation plan that will maintain the culture of the organization (its core values, beliefs and behavior norms) and build its capacity to achieve the vision shown in Figure 1.

AIO plans to convene a second staff retreat in November to continue this process.

APPENDIX A

AUGUST 2000 NATIVE LEADERS CONCLAVE Selected Recommendations

- Bring AIO's invaluable resource of knowledge and experience – current and past Ambassadors, Advisors, Board of Directors and staff – to a higher level of consciousness by engaging them in productive problem-solving forums
- Build meaningful relationships with other Indigenous peoples in the world to develop effective partnerships to achieve common goals, and to increase awareness and understanding about Indigenous issues
- Explore ways to better capture, articulate and share Indigenous philosophies, knowledge, solutions and stories
- Develop, plan and implement a problem-solving forum with Native Leaders
- Work on strengthening AIO's fund-raising and public relations capabilities
- Begin to develop a “new knowledge” library by and for Native Americans
- Continue to explore methods for modeling the Ambassadors Program in other communities
- Strategize on ways to make international exchanges among Indigenous peoples more effective

ADMINISTRATIVE GOALS & STRATEGIES

Draft

GOAL: Diversify AIO's revenue/income streams

STRATEGY: Increase AIO's foundation grants by *dollar amount* by *date*.

STRATEGY: Increase AIO's corporate contributions by *dollar amount* by *date*.

STRATEGY: Increase AIO's government grants by *dollar amount* by *date*.

STRATEGY: Increase AIO's contributions from individuals by *dollar amount* by *date*.

STRATEGY: Develop an earned income revenue stream by *date*.

GOAL: Develop the staffing capacity of the organization to implement the strategic plan

STRATEGY: Develop and implement a cross-training plan for AIO staff.

STRATEGY: Develop procedures manuals for each position's primary responsibilities.

STRATEGY: Send staff members to relevant training seminars and conferences

STRATEGY: Based on the new strategic direction of the organization, restructure
and/or expand the organization staffing.

Sample Staffing Scenario

- President
- Executive Director – *Laura Harris*
- Administrative Assistant – *Mary Lucero*
- Executive Assistant/Scheduler
- Office & Projects Manager
- Director of Development/Public Relations
- Director of Programs
 - American Indian Ambassadors Program Coordinator
 - International Program Development Specialist – *Ron Martinez Looking Elk*
- Publications Manager

GOAL : Continually enhance the Executive Director's leadership capabilities

STRATEGY: Develop and implement a professional development plan for the
Executive Director

TACTIC: Assemble a peer support network – an informal and intimate group of 3-5 close advisors who the Executive Director can call on for advice

TACTICS: The Executive Director will keep apprised of developments and trends within the leadership development sector by monitoring such groups as the Aspen Institute, Heartland Center for Leadership Development, The Black Leadership Forum, Leadership Association, etc.

GOAL 4: Develop the organization infrastructure to implement the strategic plan

STRATEGY: Acquire Wireless internet service

STRATEGY: Upgrade the computer hardware and software of all staff members. Network everyone together.

TACTIC: Upgrade everyone to a computer that has *such and such memory, hard disk space, software capabilities, etc.*

TACTIC: Upgrade the Internet skills of all staff members.

GOAL 5: Develop a comprehensive communications plan that will augment AIO's fundraising efforts.

STRATEGY: Update the website to include press releases, Ambassador program updates, newsletters, articles, etc.

APPENDIX B