

Your Philanthropic Quest Action Planning Kit

Special note if you're here with a team ...

Each member of the team will work on their own to complete steps 1 and 2. Then, the team will come together and repeat steps 1 and 2. That way, the individual thoughts can nourish everyone as the team continues through to the questions. (Except that step 8 and “Why” is again for individuals to work.)

When complete, you can talk together about what the experience was like if you like.

(Step 1 Bringing it all together) Brainstorming

Look back to your summary page. (That's the color diagram – “Your Philanthropic Quest”). See what it suggests you have going for you and what you aspire to.

With all of this in the background –
and what you've gotten in these days –
brainstorm your reaction to this question:

What are some ideas that could
dramatically advance
the cause you care most about
and perhaps get you closer
to seeing the kind of world you want?

You can jot a few or many here ...

Step 2 – Stretch your thinking as high and far as you can imagine

1. See what happens to your brainstorming, when you complete this audacious sentence,

If *only* I – or we – could _____...

Step 3 – OK, choose one to work

1. You've gone wide and high. Now among all of your brainstormed ideas, which one might –
 - hold the most promise, or
 - is the most strategic, or
 - simply, hold the most energy for you?

Sometimes, the best idea is one you have some measure of confidence you can achieve. That is, once you take into account all you – and y'all—have going for you.

It could be something that's already going on or has been planned.

2. Imagine what it would look like as this idea is coming to life in the coming year? What would that feel like? Use the next sheet of paper to write the headline that would be written a year from now, celebrating what you've accomplished. (You'll have a chance to share this with the group, if you'd like.)

[use this page for your headline]

Step 4 – Egaads, where to begin?

What's the first phase in bringing this big idea to life? (Later, you'll look at the first step. This is larger.)

Step 5: With whom?

Who comprises the critical mass to join you in bringing about the first phase?

(This could even be a group or organization that already exists and you or your organization could work with it.)

Tip: The critical mass is the fewest number of people who could make the greatest difference in getting the ball rolling.

Scribble a few names here, and then, see the sample map on the next page. And we've supplied some blanks for you, if you would like to make more specific your thinking.

(Step 5 – with whom)

***How Others
Can Make a Difference
In Your Realizing Your Best Year – and beyond***

Fill in a few blanks ...

*What could be useful –
that someone
can do for you?*

... and who could that be?

partner in thinking and strategy _____

partner in action _____

direct assistance or support (“delegatee”) _____

knows how to do this kind of stretch _____
(with the right mindset for you)

encourage, believe in you _____

important they know about it _____

must approve or can veto _____

to provide access to another _____

expertise, systems _____

more from Jim and Pam _____

other resources? _____

Remember, you *already have* more than enough, when it comes to what *you think you need*.

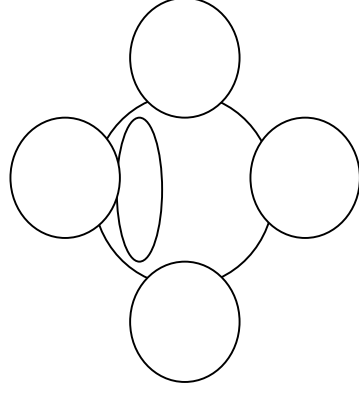
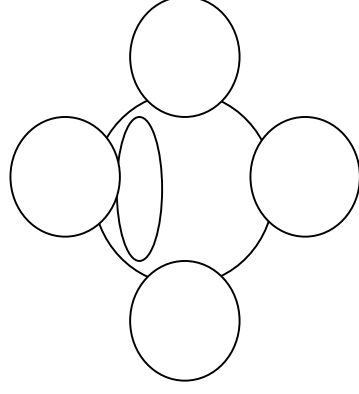
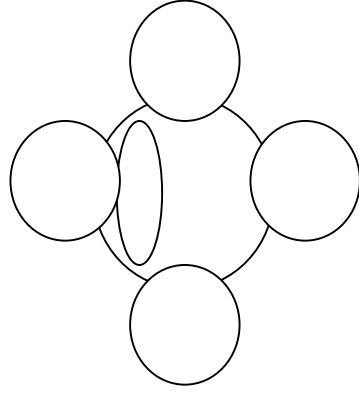
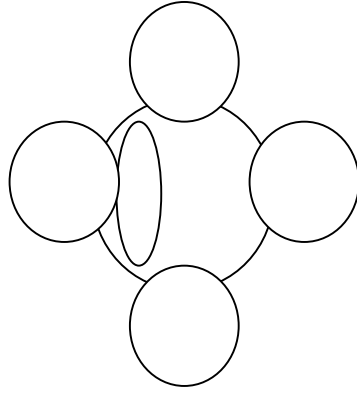
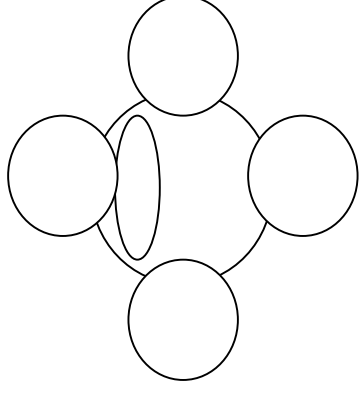
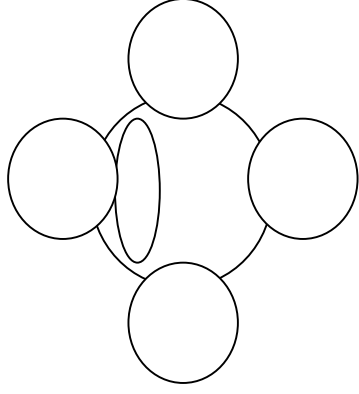
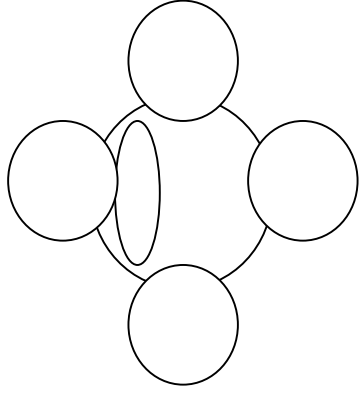
There may be just one missing piece to the puzzle, one next step, that will ensure the breakthrough.

SIM

Spheres of Influence Map

Your tool to choose candidates for engagement – based on the groups in which they have influence

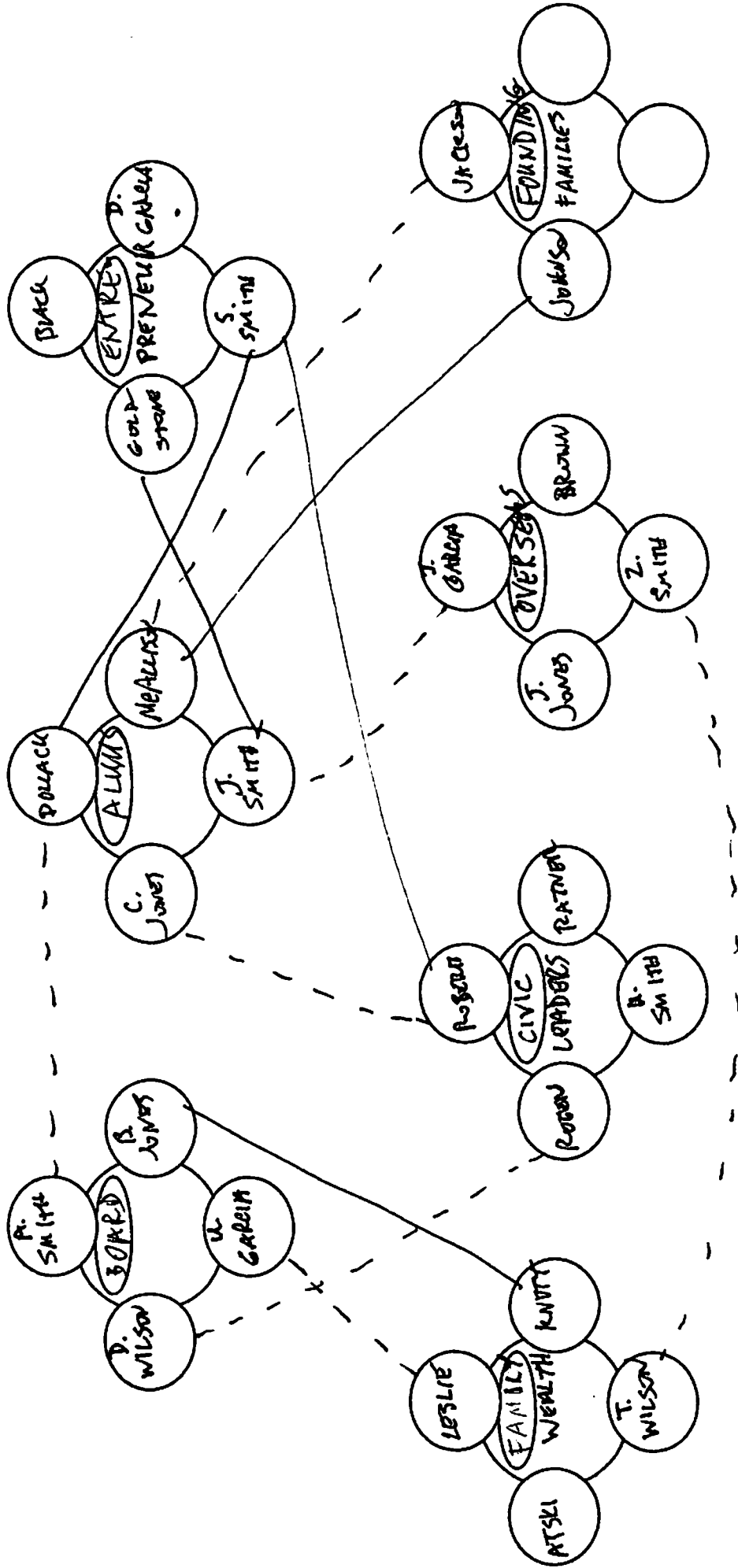
The more solid the connecting line,
the stronger the connection.



SIM Spheres of Influence Map

Your tool to choose candidates for engagement - based on the groups in which they have influence

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Step 6: So what's first?

What's the very first step that can get you off on the right foot – to ensure you're on the success path to achieve your big idea?

Tip: Consider the step may be merely clarifying an idea, making an appointment to explore a possibility that could catapult you ahead, making a decision – simply taking action, one small simple step.

Whatever it is, it's moving out of the *solo* that you've been in while you've been using this instrument, and getting into *conversation* right away.

Step 7 Right after the retreat – or even right now – who’s the first person you want to contact?

First person	...and then, most important person
<p>_____</p>	<p>_____</p>
<p>What’s their central interest? (1 or 2)</p> <p>_____</p> <p>_____</p>	<p>_____</p> <p>_____</p>
<p>What idea can I draw from what I learned or clarified here that’s likely to appeal to the person?</p> <p>_____</p> <p>_____</p>	<p>_____</p> <p>_____</p>
<p>It could be interesting to begin my conversation or email to this person by saying (actual words):</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>Optional: Is there anything I might I give to this person to read (including an email message) before?</p> <p>_____</p>	<p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p>
<p>Try-for date for 1st contact: _____</p>	<p>Try-for date for 1st contact: _____</p>

Step 8 – Now, some folks skip this step (smile). But if you’d like to take advantage of it all ...

Action Plan
for Community Benefit, Family, Work and Personal Life

To support me in realizing my best future, I want to take into account . . .

1. What I do well and want to continue doing – including what I said in the interview that I value about myself

2. What I want to do more frequently on a day-to-day basis

3. What I could begin experimenting with doing

4. What I’d like to try letting go of? At least temporarily, I’ll put them on my “not-to-do” list and see if I can live without them

What gives me energy?

Why?

- + What will I get if I cut through the distractions and noise around me – just as I've done for the last days – and focus myself unrelentingly on the idea I've expressed here?

- + And why is that good for me – and those around me, both near and far?

Pam and I are excited to be the wind at your back, joining you in capitalizing on all the other tailwinds you have going for you,

Jim and Pam