Bill Bartels – *Organization Communications and Development | Systems Process Advising* - ***GreenSource Inc***.: https://gsiodac.blog

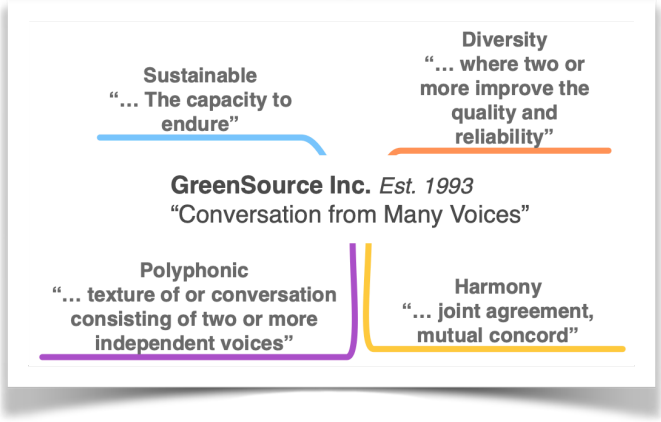
I think in and use *Mind Maps* to illustrate processes. https://en.wikipedia.org/wiki/Mind_map) My favorite, current tool is made by *Simplemind* (https://simplemind.eu). There is a free version and a pro version. Export of a given map also creates an outline of the map in .TXT file form. For those who think in a more linear way, this allows the creation of a list or matrix.

When we begin with a conversation around "How" a project or process is navigated, we are actually looking at the Why, Who, What, Where and When to contextualize the How. (Recommend Peter Block's The Answer to How is Yes.)

The basic form of an evaluation process identifies; *Foundational Values and Principles – Core Business or Project – Products* (A product is any unique offering, service, project, partnership or item) – *Revenue Architecture of each offering, service, or product – Systems of Support – Team*.

Each of these headings are balanced in relationship to: Specific Projects – Scope – Scale – Context – Competency – Capacity.

These maps are not forms to complete. They are an evaluation and prioritization tool:



- *To assess*
- *To develop an operations plan*
- *To identify and prioritize shifts or pivots*
- *To foster a deeper analysis of the project or process*
- *A way to get arms around complicated systems.*

The Maps

1. Full Project Framing with Capacity Circle.

2. Full Project Framing

3. Annotated Full Project Framing Across the Top

4. A flow for getting a project out of your head and onto paper/file/stickies…

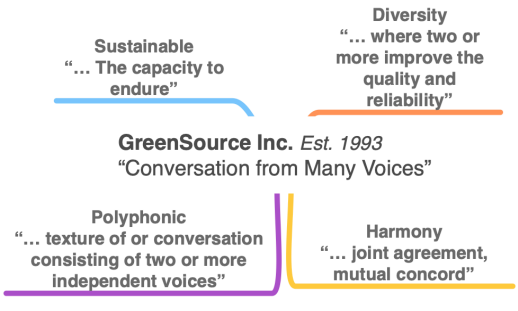
5. Discernment Flow

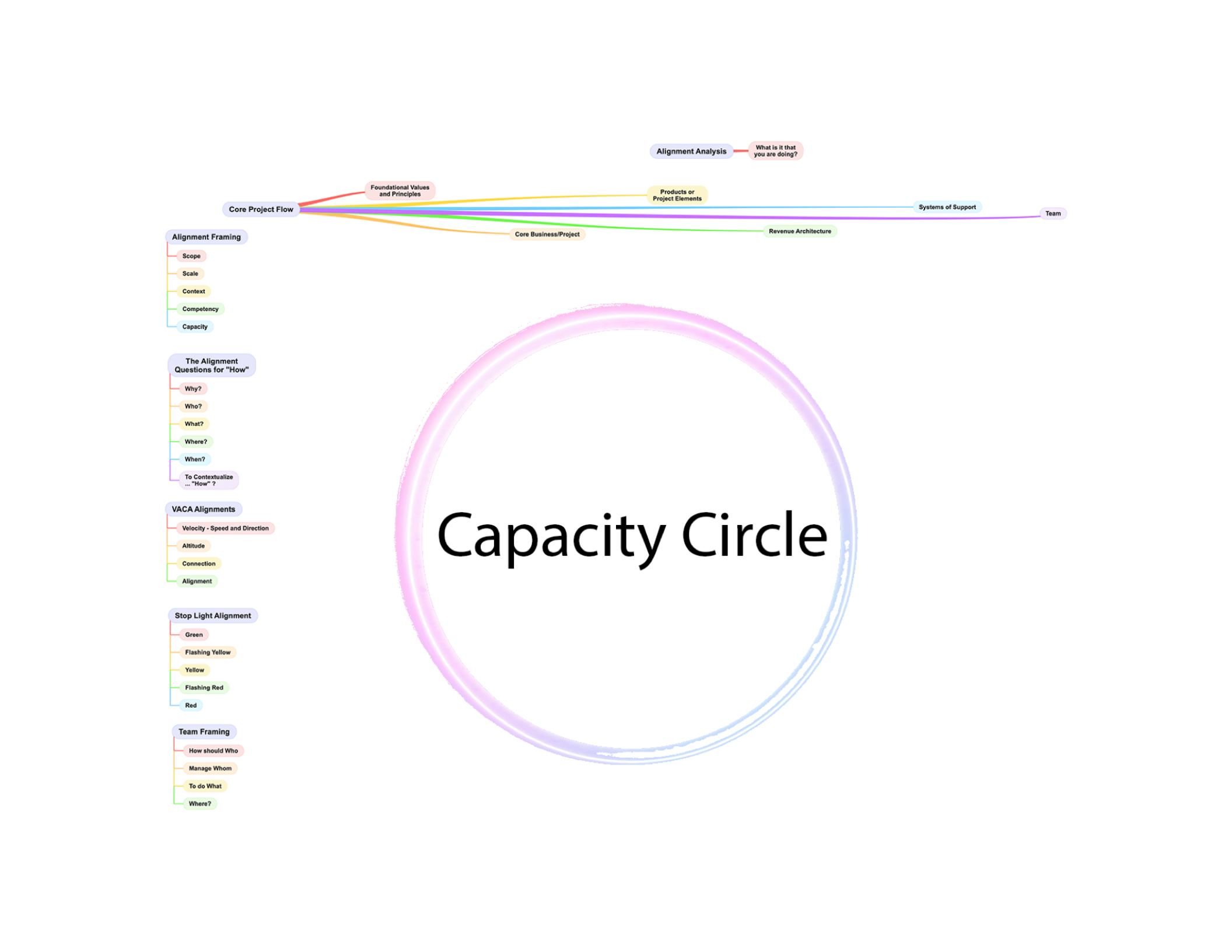
6. The various Core Businesses

7. An Entitlement Flow to have a project description and engage permitting layers

8. A framework for creating an operations flow that works for you!

9. An Organizational Framework for the Organization




Alignment Analysis
What is it that you are doing?
Foundational Values and Principles
Core Project Flow
Products or Project Elements
Systems of Support
Team
Core Business/Project
Revenue Architecture
Alignment Framing
Scope
Scale
Context
Competency
Capacity
The Alignment Questions for "How"
Why?
Who?
What?
Where?
When?
To Contextualize ... "How" ?
VACA Alignments
Velocity - Speed and Direction
Altitude
Connection
Alignment
Stop Light Alignment
Green
Flashing Yellow
Yellow
Flashing Red
Red
Team Framing
How should Who
Manage Whom
To do What
Where?
Capacity Circle

- From Idea To...
  - A set of framing and filters to clarify a project
    - Foundational Values and Principles
    - Core Business
    - Products
    - Revenue Architecture
    - Systems of Support and Coordination
    - Team
  - Universe Framing
    - Scope
    - Scale
    - Context
    - Compentency
    - Capacity
  - Contextualizing the How?
    - The Why?
    - The Who?
    - The What?
    - The Where?
    - The When?
  - The Business Unit Core Elements
    - Keeping the Lights On (KTLO)
    - Integration & Training
    - Scanning & Planning
  - Team Framing
    - How should Who
    - Manage Whom
    - To do What
    - Where?
  - Stop Light Filters
    - Green
    - Flashing Yellow
    - Yellow
    - Flashing Read
    - Red

Annotated Across the Top

From Idea To... → **A set of framing and filters to clarify a project**

Universe Framing
- Scope
- Scale
- Context
- Compentency
- Capacity

Contextualizing the How?
- The Why?
- The Who?
- The What?
- The Where?
- The When?

The Business Unit Core Elements
- Keeping the Lights On (KTLO)
- Integration & Training
- Scanning & Planning

Team Framing
- How should Who
- Manage Whom
- To do What
- Where?

Stop Light Filters
- Green
- Flashing Yellow
- Yellow
- Flashing Read
- Red

Foundational Values and Principles
- What is important to you?
- How (why, who, what, where, when) do you work with people?
- How (why, who, what, where, when) dos you expect people to work with you?
- How (why, who, what, where, when) do you expected to be treated?
- How (why, who, what, where, when) do you treat people, processes, and relationships?
- What are the three most important things to you?
- What is more important?
  - Relational business?
  - Transactional business?
- Are you at core, relational/transactional?
  - Describe what that looks like.

Core Business
- What is the core set of solving or practice that is your business?
- What is the value or solution that your business brings?
- What do you get paid for?
- What are the success metrics when what you do works?
- What are the foundational elements that are your core business (the why, who, what, where, when) that are your core business that are represented by each product?
- What parts or the business are relational?
- What parts of the business are transactional?

Products
- A product is any individual or discrete project/relationship/process - the deployed core business elements.
- May be a specific, separate product
- A separate partnership
- A separate client profile pool
- A separate revenue stream
- A separate or segmented service or product
- A specific entitlement

Revenue Architecture
- For Each Product, there will be a separate set of costs, income streams, and client/customer profile.
  - Elements of how the money works.
    - The Input, The Output, The Throughput.
    - The why, the what, the who, the where, the when of each profile.
  - What are the operational costs?
  - What are the income streams?

Systems of Support and Coordination
- Management
- Human Relations
- Accounting
- Marketing
- Compliance
- Training
- Forward Plannning
- Reference Library
- Operations
- Project Coordination
- Communications
- Customer Relations

Team
- How Should Who
- Manage Whom
- To Do What
- Where?
- Who is your team?
- What are the roles that your team executes?

What is it that you are trying to do?

Steps to Start (Getting it out of your head and on to paper (into computer))

I.
1. Move the idea from your head to paper, computer, and image

2. Start with What it is that you are trying to do?

3. What is the value add that you are selling?

4. What is it that you are solving?

5. What are people paying you for?

6. What is the business that you are in?

7. What is the Product?

II.
1. Who is doing this business?
2. Who is the Team?

III.
1. Where is this Business Located?

IV.
1. What is the Core Business?

V.
1. What are the product offerings.

VI.
1. Who is the Client?

VII.
1. What are the Steps to the Minimum Viable Market?

VIII.
1. Where is the Start Up Capital Coming From?

IX.
1. What Systems are in place to manage: A. Place B. Clients C. Content/Inventory D. Cash E. Taxes F. Team G. Conflict H. Success I. Challenge J. Priorities K. Capacity

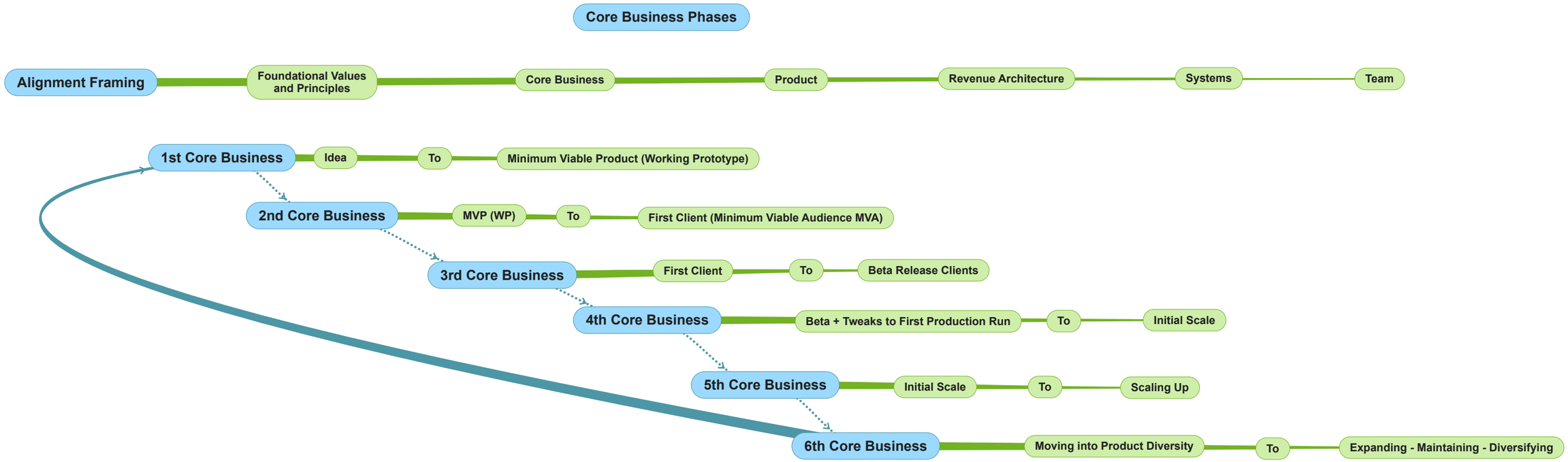
X.
1. What is the Revenue Architecture?
2. How does the Money Flow?
A. Inputs?
B. Throughputs
C. Outputs?

- **Alignment Elements**
  - **Questions**
    - Proof of Concept
    - Proof of Value
    - Alignment of needs with services
  - **Motivations?**
    - What compels activity?
    - What compels the sense of urgency?
    - What gets everybody's attention?
    - And with attention, a willingness to participate.
  - **Where is the organization in the Five Levels?**
    - Getting in the room?
    - Introduction
    - Engagement
    - Enrollment
    - Integration
  - **Where is Leadership Leading?**
    - Top?
    - Middle?
    - Rank and File?
- Of System of Service
- Of System of Need
- Capacity?
- Context?
- Scale?
- Scope?
- What is the project?
- **System Introduction**
- Why?
- Who?
- What?
- When?
- Where?
- How?
- **Elements Awareness**
- **Getting In The Room**
- **Context of Elements**
  - From the top
  - From the middle
  - From the bottom
- **Relationship of Systems Elements**
- **Capacity**
  - Organizational Capacity to Accept Support?
  - Comprehensive Economic Development Strategy? (CEDS)
  - Partnership Framing to get to first steps.
- **Introduction**
  - **Data**
  - **to**
  - **Data Base**
- **Taking Stock**
- **Access Points**
- **Collection Within**
- **Engagement**
  - **Data Base**
  - **To**
  - **Taxonomy Development**
- **Enrollment**
  - **Taxonomy**
  - **To**
  - **Analysis**
- **Execution/Integration/Conversion**
  - **Analysis**
  - **To**
  - **Operations Deployment**

Discernment is the ability to obtain sharp perceptions or to judge well. In the case of judgement, discernment can be psychological, moral or aesthetic in nature. Within judgment, discernment involves going past the mere perception of something and making nuanced judgments about its properties or qualities. Wikipedia

Discernment Framework

Core Business Phases



The Questions

1. Why?
2. Who?
3. What?
4. Where?
5. When?
6. To inform How?

Framing the Project

1. Scope?
2. Scale?
3. Context?
4. Competency
5. Capacity/Bandwidth

The first step... Where are you doing and what are you doing and ... what is the scope, scale and context of what you are doing?

Where, What, and How... What is the scope? What is the scale?

Ask and ask again and again. Is there a congruency in the project description and the narrative that follows?

Only when there is a complete foot print that is described in the project description is there a good reason to engage the regulatory schemes.

1. Project Description

Each project that moves from beginning to end begins with a description.

The process is step by step. The following flow boxes are created to help the applicant through the permissions from beginning to end. In order to do a Project/Business in Ventura County one must engage the regulatory schemes that exist in all jurisdictions. Those schemes may not be coordinated but, with a good project description, one can anticipate some of the challenges and navigate the processes with a clear vision of what your Project/Business is and how it will interact with the permitting processes.

Land Use Zoning: In every jurisdiction land use activities are regulated by a zoning ordinance. These documents identify the kinds of activities which will be acceptable on a specific piece of property.

As a result, every Project/Business needs to develop a description of its activity, its behaviors, in order to interact with the zoning code. This description will also help the Project/Business navigate all of the other regulatory schemes that impact Project/Business activities.

The purpose of working through the questions is to allow a Project/Business to identify those regulatory schemes which apply and to have a coordinated method for navigating the various schemes. If the process begins with a clear project description then the impacts of the Project/Business activity, where it can occur and how the permissions can be coordinated, all fall into place.

2. What and who, are the permitting and regulating agents in the place which you choose to do a project of business?

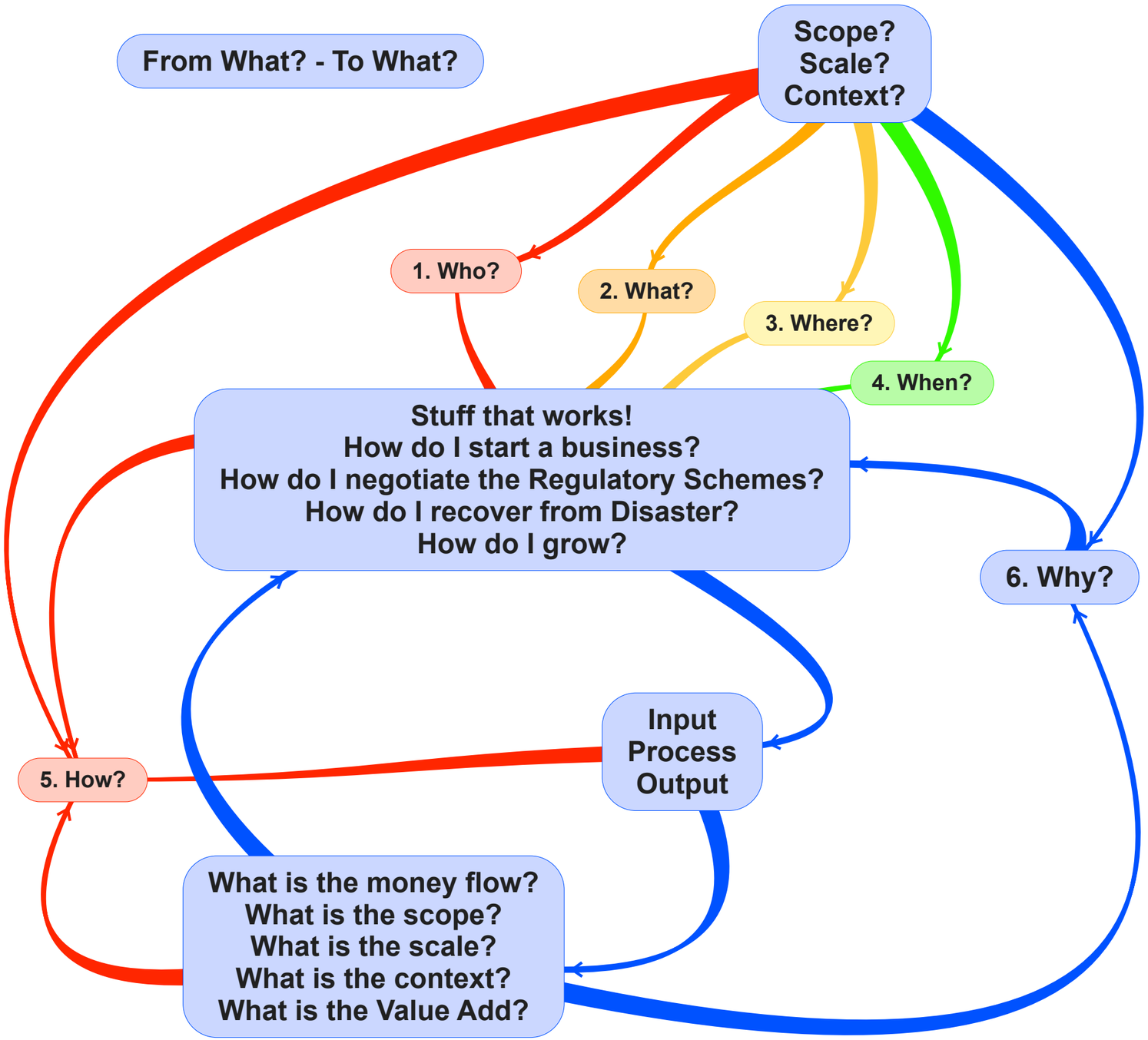
Using the project description and researching the location of your project will illuminate the regulatory permissions that you need to engage.

3. Project Description Questions

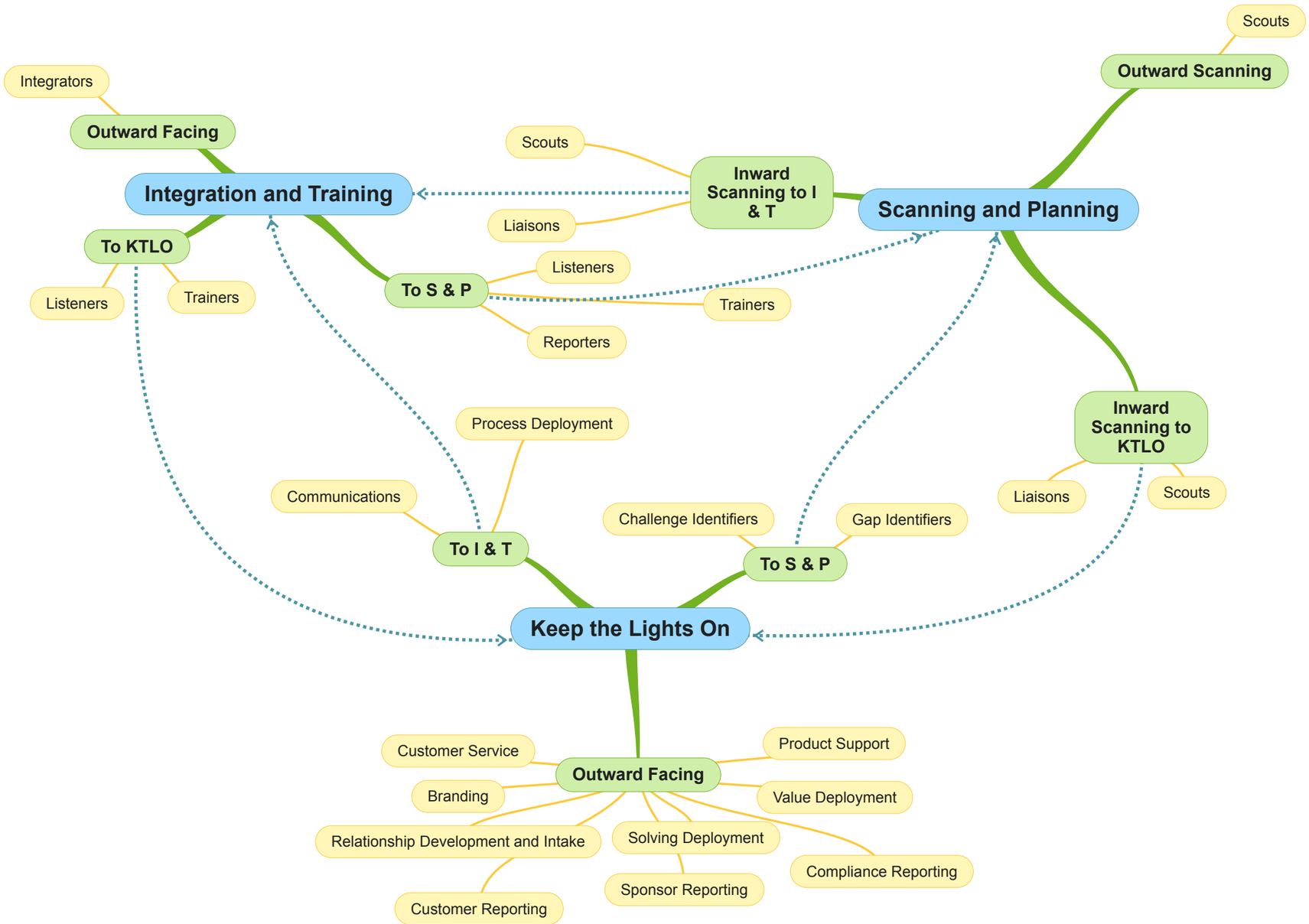
Where are you doing this project?
Is the project on a legal lot?
Is this a primary or ancillary use?
What are the physical constraints of the site?
How does the water flow on the site?
What are the interface constraints? (Wild Land Fire, Animals, Traffic)
What is it that you are going to do? Parking?
What impacts will you have?
Number of cars coming and going?
How much power?
Water needs?
Gas?
Will you make noise?
Will you put out smoke?
Do you need a buffer from your neighbors? Do they need a buffer from you?
Food Prep?
Access Easements?
Is it hazardous?
Pervious surface/impervious surface?
Soils?
Where are you going to do this?
Is it allowed?
What is the zoning?
What is the process to start doing it? How is it allowed?
Who do you have to ask permission? Business License?
Building and Safety?
Planning?
Environmental Health?
Fire?
Public Works?
Schools?
Neighbors?
Police?
Who do you have to tell? Local Folks?
County Folks? State Folks? Federal Folks?
Who is the business? Just you?
A company?
Traffic?
When are you going to do this?
What are your hours?
Are those hours flexible?

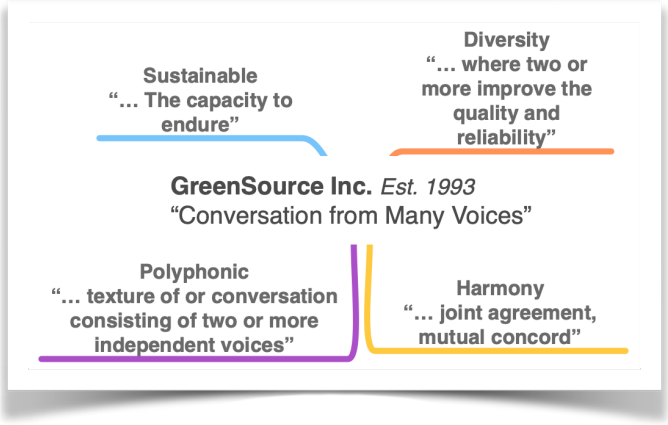
4. Potential Permitting Schemes in need of coordination for an individual project (Never a complete list)

CEQA
NEPA
Environmental Health
Building and Safety
Planning
Food and Drug Administration
Agricultural Permissions
Specific Plans
Area Plan Overlays (Santa Monica Mountains, Hillside, Slope Density)
Air Quality Management
Map Act
Fire
Watershed Protection
Flood Plain Management
Public Works
Local Agency Formation Commission (LAFCO)
Police
Business License
Special material permits
Regional Water Quality Control Board Storm Water/Discharge (MS 4)
Coastal Commission
Americans With Disabilities (ADA)
State Regulations
Federal Regulations
Local, County, State, and Federal Taxing Authorities


From What? - To What?
Scope?
Scale?
Context?
1. Who?
2. What?
3. Where?
4. When?
Stuff that works!
How do I start a business?
How do I negotiate the Regulatory Schemes?
How do I recover from Disaster?
How do I grow?
6. Why?
5. How?
Input
Process
Output
What is the money flow?
What is the scope?
What is the scale?
What is the context?
What is the Value Add?

Inward and Outward





Some **Simple Practices** to help with Strategic planning. This is also called Organizational Communications and Development.

1. Listen for when the word *BUT* is used - either by you or in reference to the project, try replacing it with the word *AND*.

2. When the question *HOW* is asked, hear it as *Why, Who, What, Where, and When* all to contextualize the How.

3. Before reaching out to a regulatory layer or scheme, be clear about your project. Why are you doing it? Who is doing it? What are you doing? Where is it being done? When is it being done?

4. Aligning your project with your own capacity is critical. Being clear on the scope, scale, and context of the project - the elements of alignment with your competencies and the total capacity of what you can do will help prioritize the next steps in a process.

5. A project is a set of processes in relationship. The work of planning is to have as much alignment as possible from the beginning. Let this work be fun.

6. There are always areas of concern or worry, write them down… start a, " things that scare/worry/keep me awake/wake me up in the …" book so that these little gremlins don't live in your head. Once they are out, it is much easier to negotiate and assess each of them.

7. This is your project, ***own it***!