



## WGI BOARD OF DIRECTORS STRATEGIC SESSION: 1 & 2 JULY 2024

Venue: Palmer House Hotel, Chicago, Illinois

### Introduction:

The hybrid meeting of the WGI Board of Directors (BoD) proved to be a connecting experience where people could step into their authentic selves, contribute to deliberations, and think creatively. Most importantly, it was evident that the use of connecting habits created a safe space for effective engagement without dictating how people should interact. This allowed everyone to collectively lead the three days, ensuring that we learned and grew together as we clarified some crucial fundamental issues for WGI.

This collaborative spirit continued into the meeting with member organization representatives, where an overview of the BoD process was provided, and high-level thoughts about WGI's future were shared.



The engagement in the BoD and MO meetings was a special experience for people to connect, bond, and share as they embraced leading WGI and envisioning its future.

### Recap of WGI BoD meeting (01 & 02 July)

#### Day 1

The team discussed plans for upcoming events, emphasizing the importance of alignment with the organization's vision and values and the need for improved communication and technical setups. They also deliberated on the organization's mission to promote mental wellness, the role of choice theory in their approach, and the significance of leadership, connection, and celebration in creating a safe and relevant environment for the organization to thrive. Lastly, they addressed operational sustainability and the importance of inclusiveness within their international board, member organizations, and all other stakeholders.

## Day 2

The team discussed strategies to support the growth of MOs and implement global policies for better coordination and operations. They also explored ways to increase financial sustainability, improve governance, and prioritize initiatives based on impact and complexity. Emphasizing the importance of data-driven strategies, effective communication, and building strong relationships with representatives from the MOs, they recognized the need for a clearer understanding of active membership and a more systemic model for their operations.

## Next Steps

- The Board will finalize and adopt the new core values: connecting, leading, and celebrating. A formal motion needs to be passed by the Board at the next Board meeting.
- The Board will develop operational values and behaviors to complement the core values.
- The Board will consider how to communicate vision and values changes to member organizations.
- Nadia will update the website draft with the new vision and values language.
- The Board will further discuss and define WGI's role versus member organizations' roles with the MOs.
- The Board will explore ways to make meetings more inclusive for virtual participants.
- The Board will review the strategic plan in light of the new purpose, vision, mission, and values.
- The Board will prioritize and map out specific initiatives for implementation over the next 3–5 years.
- Develop a strategy for building the WGI brand, including promotion, representation, and thought leadership.
- Work on improving data collection and feedback systems from MOs and training participants.
- Develop a new membership model and financial sustainability plan for WGI.
- Develop partnerships and sponsorships for WGI.
- The Board will create a centralized resource library and improve the WGI website and platform.
- Develop a plan for improving governance and quality standards across the organization.
- The Board will strengthen networking and relationships between WGI and MOs.
- Gather current membership data and numbers from all MOs.
- Develop an induction package for new WGI members.
- Create a strategy for engaging younger demographics.
- Identify 2–3 key MOs to pilot new initiatives with over the next 6 months.
- Develop a video and information package to share updates with all MOs.
- Review and update WGI's policies and procedures.

## Day 1: 01 July 2024

### Organization Purpose, Vision, Mission, Values and Share-Oriented Approach

The session began with Lynn, the Chairperson, framing the discussion on the identity of the organization. She highlighted the need to distinguish between WGI as the international organization and the member organizations operating in their respective countries. It was emphasized that the relationship between WGI and the MOs should be clarified to focus on integration and complementarity rather than competition.



The importance of understanding WGI's identity as comprising the Board of Directors, member organizations, individual members, and external stakeholders was stressed. The purpose of WGI as an international organization with several global member organizations was explored. This discussion led to a brainstorming session where members could provide input.

They deliberated on shifting from a training-focused model to a share-oriented approach based on the Choice Theory framework. This change aimed to disseminate the organization's ideas more broadly and generate revenue from non-product-based sources. The team also discussed potential challenges, such as competing with member organizations, and considered refining their organization's values to promote mental and emotional well-being.

The discussions were categorized into:

- Sharing and advocating Choice Theory
- Networking and building relationships with stakeholders
- Focusing on emotional and mental wellness
- Sustaining the organization

## Purpose

Further discussions led to several iterations of a statement encapsulating the purpose of WGI, culminating in a purpose statement creatively crafted by all members present. The newly proposed purpose is:

WGI's **purpose** is to:

**share and advocate** Choice Theory® by  
**modelling** effective relationships and  
**networking** with stakeholders.

## Vision and Mission:

The team continued to review the vision and mission statement. They highlighted and appreciated the process that yielded the current vision, which involved extensive consultation and engagement with MOs to collectively craft the current vision and mission. This ensured buy-in and ownership from member organizations. The team valued the process and the current framing of the vision and mission statement, suggesting that only minor adjustments should be explored.

Adjustments considered for the vision statement included:

Expanding the scope and applications to target areas beyond mental wellness, shifting the focus to broader societal issues. This led to the suggestion of framing it as 'social and emotional wellness.' The adjusted **vision** proposed is:

**'Inspiring social and emotional well-being to all humanity'**

The adjustment considered for the mission statement were:

- the collaborative element that we wish to highlight as we work with member organizations. The adjusted **mission statement** proposed is:

- ***The WORLD needs "a new model for LIVING"***
  - ***to create individual well-being and mental health,***
    - ***fulfilling relationships***
    - ***& satisfying work and learning environments.***
  - **We provide knowledge and skills, uniquely underpinned by Choice Theory®, an internal model of empowerment for "how people can get along better".**
  - ***We operate with Member Organizations around the world offering culturally respectful training & innovative initiatives.***

## Values

The team discussed the importance of values such as innovation, connection, and celebration in creating a safe and relevant work environment. They emphasized the need for adjustments in framing to maintain relevance and highlighted the values of connection and advocacy, focusing on mental wellness, self-growth, and collaboration. The concept of "celebrating" was introduced to focus on strengths and opportunities, and they discussed the connection between these values and the teachings of choice theory. Finally, they agreed that "connecting" would be adopted as one of their core values, emphasizing accountability, collaboration, and integrity. The team decided to revisit the concept of "innovation" in future discussions, considering its strategic importance without overemphasizing its operational implementation.

The team deliberated on the significance of leadership, emphasizing the need to move away from external control and embrace a self-confident approach. They discussed the terms "accountability," "leading," and "connecting," debating their operational and strategic implications. The concept of inclusivity was also highlighted, with the team considering words such as "respecting," "inspiring," and "celebrating" to guide their actions. The discussion concluded with the team valuing their product and theory, and focusing on the values of "connecting," "leading," and "celebrating," with particular emphasis on the latter as a positive and energizing aspect.

The core values proposed are:

**‘Connecting, Leading, Celebrating’**

## Day 2: 02 July 2024

### Growth and Strategic Planning

The day started with the team reflecting on the previous day's discussions on the purpose, vision, mission, and values.

They explored how to fulfil WGI's purpose by addressing the question: "What can WGI do that MOs cannot?"

The discussion included implementing global policies and procedures, maintaining consistent training, gathering information, and promoting well-being activities. They proposed creating a centralized database, a resource library, and a global feedback data source. The group also discussed the importance of high-value engagement, local trends, and global partnerships. They emphasized multiple perspectives, cultural sensitivity, and WGI's role as a spokesperson.



Topics included the organization's unique model, the potential for a global research database, and categorizing topics by importance. The team agreed to revisit their current strategic plan and make necessary adjustments for future success.

### Optimizing Work Processes and Strategic Shifts

The team focused on optimizing work processes, sharing updates, and building relationships through Zoom. They discussed the importance of data, standardization, policies, and a unified brand and identity across the organization. They also touched on collaborating with government programs, the need for sensitivity in decision-making, and shifting focus from governance to strategic activities. The team reviewed their progress and discussed the relevance of different levels of knowledge.

### Mapping Influence and Control

Laura led a comprehensive discussion on mapping the ideas generated onto a grid to identify the extent of their influence and control, focusing on the organization's budget, training activities, and membership models. The team also highlighted the importance of framing initiatives to increase revenue for both WGI and the MOs and discussed the need for improved organization and engagement with MOs on implementation issues. They also addressed governance, emphasizing authenticity to the choice theory model and improving engagement mechanisms. The team decided to focus on areas where they have control and influence.

### Organization Control, Influence, and Sustainability Discussion

The team discussed the organization's control and influence over various initiatives, focusing on financial sustainability, partnerships, and sponsorships. They acknowledged the need to increase control, particularly in financial sustainability, and discussed associated challenges. They also emphasized thought leadership and representation.

### Financial Sustainability and Membership Strategy for WGI

The discussion focused on WGI's financial sustainability and the need for higher autonomy and control for member organizations. They proposed that members contribute directly to WGI's financial sustainability and discussed a new membership strategy, including lowering the entry barrier, expanding the global footprint, and offering enhanced member benefits. They touched on the concept of 'subscribers,' balanced representation, and quality control. The team explored governance complexity, leadership effectiveness, and integrating cultural variations into operations, aiming for a more systemic model focused on responsibility and intentionality.

### Prioritization Strategy and Team Communication

The team discussed a prioritization strategy for their projects and initiatives based on impact and complexity, aiming to boost momentum with quick wins.

### Prioritizing Initiatives for Brand Building and Sustainability

The team prioritized initiatives based on impact and complexity, focusing on brand building through promotion, representation, and thought leadership. They emphasized the need for a data-driven strategy to enhance user experiences, integrate quality improvement, and address gaps in risk areas. They highlighted the potential of data for securing funding and the value of partnerships. Financial sustainability, governance, and continuous quality improvement while considering cultural variations were identified as top priorities. Action items included identifying steps to implement strategic initiatives and engaging the MOs in the process.

### Strategies for Securing Funding and Strengthening WGI

The team discussed strategies to secure funding and labor contributions for their initiatives, emphasizing the need for a compelling case presentation to their partners. They strategized on improving information dissemination and building stronger relationships with representatives from the MOs. Plans included involving key members to lead, creating live video content for better member engagement, and optimizing the organization's components. They identified the need for a clearer understanding of active membership, a capacity review of all systems, and resolving issues with the organization's database.

## Aligning the Initiatives with Current Priorities

The team identified initiatives of high value and separated them into:

- Quick wins: Initiatives that can be easily achieved and positioned to move quickly.
- Hard to achieve: Initiatives that are more difficult and positioned for long-term strategic intent.

The four priority areas developed over the last two years were positioned to make sense of the creative discussions that highlighted key initiatives.

The initiatives were categorized under the following pillars:

### 1. Building the Identity of WGI

- Systems to enable compliance and consistency
- Payment of fees
- Inductions
- Number of members
- MO feedback
- Tracking for continual improvement
- Website improvement
- Representation
- Thought leadership

### 2. Engaging Stakeholders

- Network – Sharing experiences
- Board to MO relationships
- Celebrate globally
- Network – interest groups

### 3. Honoring the Integrity of CRTLM

- Shared resources – central library
- Platforms on the website
- Templates
- Setting standards

### 4. Developing a Sustainable Organization

- Increase revenue
- Sponsorships and partnerships
- Promotion of WGI
- E-commerce
- Voice of the 'customer' – progress data, training feedback, governance





The team reviewed the current priorities of WGI based on the identified initiatives and revised WGI's priorities. The proposed priorities of WGI are:

**1. Building the Identity of WGI**

- Clarify the role, value, and relationship of each element of WGI (BoD, MOs, committees, external stakeholders, members)
- Unify our brand

**2. Engaging Our Stakeholders**

- Increase support for and from MOs
- Expand the footprint inward and outward (external)
- Develop the voice of the stakeholders (data collection, visibility, feedback) for quality improvement

**3. Honoring the Integrity of CT & RT**

- Ensure internal standardization of the teaching of Choice Theory and Reality Therapy
- Ensure the relevance of CT & RT through the professional development of faculty and research

**4. Developing a Sustainable Organization**

- Address the internal and external competitive environment
- Build capacity of WGI – MOs, Committees
- Restructure the organization at all levels to meet the needs of a new vision and mission
- Increase revenue (MO to WGI & External to WGI)