



Fetzer Institute

Theory of Change and Organizational Development Strategy

INTRODUCTION

Dear Reader:

The Fetzer Institute was founded in 1986 by John E. Fetzer with a vision of a transformed world, powered by love, in which all people can flourish. Our current mission, adopted in 2016, is to help build the spiritual foundation for a loving world.

Over the past several years, we have been identifying and exploring new ways to make our vision of a loving world a reality. One aspect of this work has been the development of a new conceptual frame resulting in a comprehensive Theory of Change. This document aspires to ground our work for the next 25 years. Further, this in-depth articulation of our vision allows us to invite thought leaders across disciplines to help sharpen our thinking.

This document represents a moment when many strands of work and planning by the Institute board and staff came together in a very powerful way that enabled us to articulate our Theory of Change. However, this is a dynamic, living document, and we encourage you to read it as such. For example, we are actively developing detailed goals and action plans, and we continue to examine our conceptual frame, even as we make common cause with all who are working toward a shared and transformative sacred story for humanity in the 21st century. We continue to use our Theory of Change to focus our work, inspire and grow our partnerships, and identify the most pressing needs in our world.

I look forward to your feedback and invite you to learn about how our work is coming alive in the world through our program strategies, initiatives, and stories at [Fetzer.org](https://www.fetzer.org).

Sincerely,



Bob Boisture
Fetzer Institute President and CEO

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OUR MISSION AND COMMUNITY

Our Mission

Helping build the spiritual foundation for a loving world

We are spiritual beings. Born into mystery, we cannot escape the deep questions of existence and the human condition. We long for a life-affirming connection with transcendence—a connection that will give us the love, courage, and hope with which to build a life and to build a world. In the end, whether we find this sustaining spiritual connection makes all the difference.

Each moment in history presents its own new version of this spiritual challenge. Ours is the challenge of finding a personal spiritual path that will sustain us individually, while at the same time finding together the spiritual common ground on which to build a loving global community.

We face this challenge in a rapidly changing and increasingly fragile world. Globalization is overturning old ways, old values, and old institutions, lifting many but leaving many others behind. Religious, ethnic, and ideological conflicts are dividing us at precisely the time we need to be coming together. Climate change and environmental degradation are threatening the natural systems that sustain us and all life.

In our hearts we know that whether we meet and overcome



these challenges will ultimately depend far less on our technology, industry, and public policies than on whether a critical mass of us opens our hearts in love to each other and to the natural world. The future is in our hands, but it is much more in our hearts.

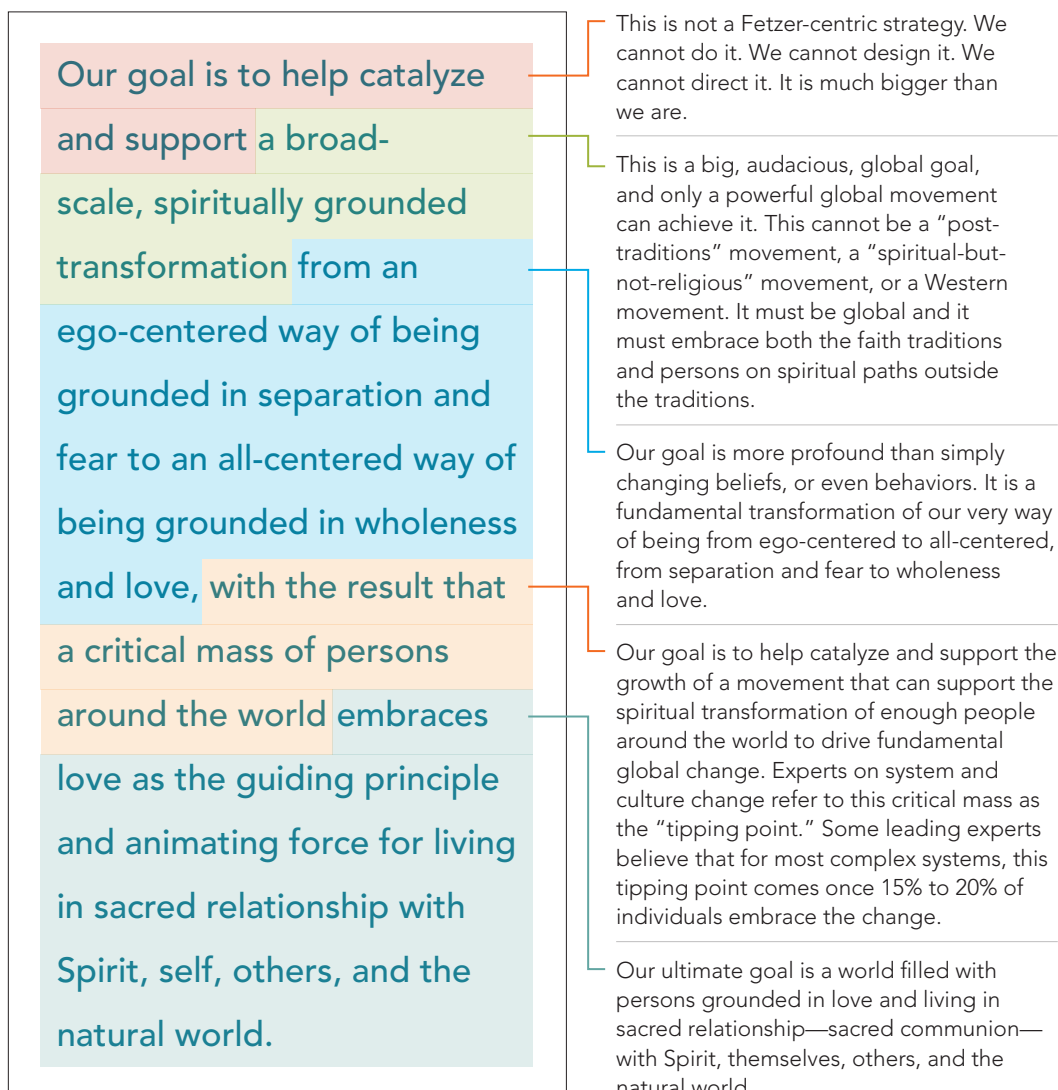
This is the exciting and important work of building the spiritual foundation for a loving world. Along with millions of others around the world, we wholeheartedly take up this work with joy and hope.

Just as moments in history bring their own spiritual challenges, there is a corresponding spiritual evolution of humanity that provides the potential to meet those challenges. Through our Community of Freedom, we bring the strengths of our institution into creative relationship with these spiritual challenges and capacities. The Fetzer long-term goal and strategic program areas serving that goal have emerged from this creative relationship.

Our Long-Term Goal

Our goal is to help catalyze and support a broad-scale, spiritually grounded transformation from an ego-centered way of being grounded in separation and fear to an all-centered way of being grounded in wholeness and love, with the result that a critical mass of persons around the world embraces love as the guiding principle and animating force for living in sacred relationship with Spirit, self, others, and the natural world.

Several key elements of this goal statement have important implications for our Theory of Change and our strategy:



Our Community of Freedom

John Fetzer saw clearly that the Institute's mission would not be the work of a single lifetime, but rather of many lifetimes, and, therefore, that our mission could only be carried forward by a deeply grounded spiritual community committed to what he called "freedom of spirit." Accordingly, in his final words of counsel to the Institute trustees, he said:

I am sure that as you listen, you will hear the ring of truth, first and foremost, trying to create a community of freedom ...

It was in this Community of Freedom, he said, that the Institute would discover the particular focus of its work in the world, noting only that, *Whatever the final verdict turns out to be, its summary will be unconditional love.*

The Institute has been living ever more deeply into this vision over the quarter century since Mr. Fetzer's death. Two milestones in this journey bear noting. The first came ten years after his death, when the trustees of the Institute and our sister organization, the Fetzer Memorial Trust, took up the challenge of stating as clearly and concisely as they could their understanding of the essence of John Fetzer's vision and the Institute's mission. The resulting statement has become our Guiding Purpose.

GUIDING PURPOSE

To awaken into and serve Spirit for the transformation of self and society, based on the principles of wholeness of reality, freedom of spirit, and unconditional love, and the integration of the inner life of mind and spirit with the outer life of action and service.

The second milestone came in the fall of 2013 when we renewed and redoubled our effort to put this Guiding Purpose at the center of everything we do. Since then, once a week, our entire staff of 60 comes together for three hours to work on this challenge. During board meetings, the trustees join in. We call these weekly meetings our "Community of Freedom Gatherings."

At these gatherings, we share in spiritual practice, work on building relationships and building trust, explore our spiritual identities, and discuss our emerging program vision and strategy. It has been exciting to realize that in this work, we are wrestling in microcosm with the same spiritual challenges that face the global community.

We are a spiritually diverse community of people on any number of spiritual paths, both within and outside the world's faith traditions, including some who simply ask not to be labeled. From this diversity, challenging questions have emerged: Is there a spiritual common ground



on which we can all stand? If so, what is it, and how can we honor the fact that we reach it by very different paths? How can we strengthen and deepen this common ground that unites us, while at the same time supporting each other in going deeper on the particular spiritual paths that each of us has chosen? How can we live our values of love, trust, authenticity, and inclusion in all that we do?

This effort has borne amazing fruit. Truly transformative love and leadership have come forward from every corner of our community. Through this work we are beginning to write the next chapter of the Fetzer story.

We have come to a new understanding of "freedom of Spirit" as entailing both the "positive freedom" to become the persons that Spirit intends

us to be and the freedom from coercion which allows us to pursue our spiritual journeys.

We have come to a new way of describing our spiritual common ground:

We are drawn into community by our shared experience that there is more to reality than physical reality, and that this “something more” binds us to each other and to all that exists in a deeply interconnected, meaningful, and sacred way, and calls us to a life of love.

We have come to a new way of describing the sort of community we are:

We are an inclusive, spiritually grounded community of love and hope.

And, we have come to a new clarity about the work we are called to do:

We want to help build the spiritual foundation for a loving world.

Our Community of Freedom is the foundation for all that we are and all that we do.



OUR THEORY OF CHANGE

THE CENTRALITY OF SPIRIT IN OUR THEORY OF CHANGE

Since our core goal is spiritual transformation, at the core of our Theory of Change must be our understanding of how this transformation occurs.

The opening words of our Guiding Purpose—*To awaken into and serve Spirit for the transformation of self and society*—capture the heart of our theory of transformation. We are transformed by awakening into and serving Spirit.



By “Spirit” we mean that “something more” within and beyond physical reality that binds us together with each other and with all things in a deeply interconnected, meaningful, and sacred reality, and that calls us to a life of love. Some traditions conceptualize this “something more” as God; other traditions conceptualize it in nontheistic terms.

The shared experience of Spirit is the spiritual common ground for our Fetzer community, and we believe it can be the spiritual common ground for the global community.

In affirming the existence of Spirit, we are making a profound ontological affirmation about our understanding of fundamental reality—namely, that meaning, purpose, and love are part of the very fabric of reality.

This ontological affirmation informs all aspects of our Theory of Change and all elements of our strategy.

- **Spiritual transformation.** As noted above, awakening into and serving Spirit is at the heart of our understanding of spiritual transformation.
- **New Narrative.** The affirmation of Spirit is central to the ontological foundation of the New Narrative and infuses it with deep existential hope.
- **Global movement.** Spirit is both the guide and the “wind beneath the wings” of the global movement.
- **Spiritual communities.** The shared experience of Spirit provides the foundation for our Community of Freedom, as it does for many life-affirming spiritual communities within the faith traditions, and for many new forms of spiritual communities emerging outside the traditions.

- **Engagement with science.**

We hope to support the emergence of a scientific paradigm that opens space within the scientific understanding of reality for Spirit, free will, purpose, and objective value.

As noted above, a key element of our experience of Spirit is mystery. In experiencing and understanding Spirit, we “see through a glass darkly.” We “see” clearly enough to discern important truths about Spirit—most importantly, that at the heart of Spirit is love—but the glass is sufficiently opaque that a definitive understanding of Spirit is forever beyond our

reach. This limitation on the spiritual way of knowing (and corresponding limitations on the scientific way of knowing) is central to the epistemology of the New Narrative discussed below, as well as to our vision of an inclusive global movement for spiritual transformation.

THE TWO-LEVEL STRUCTURE OF OUR THEORY OF CHANGE

As noted above, we are persuaded that only a powerful global movement can catalyze the broad-scale, spiritually

grounded transformation that we seek. Given this conclusion, we must decide how to deploy our resources so as to maximize our contribution to catalyzing and supporting the emergence of this movement.

Answering this question requires a two-level Theory of Change. The first level must focus on the movement as a whole, identifying the key factors that will determine the growth and effectiveness of the overall movement. The second level must focus on Fetzer, identifying the most effective way for us to deploy our resources to support the growth and effectiveness of the movement.

Our Movement-Level Theory of Change

THE EMERGING GLOBAL MOVEMENT FOR SPIRITUAL TRANSFORMATION

We believe that the same powerful forces that have led us to conclude that a global movement for spiritual transformation is both urgently needed and realistically possible are drawing large numbers of other people and organizations around the world toward the same conclusion.

While still in the very early stages of its development, this global movement is emerging across cultures and spiritual paths in the form of a large number of smaller spiritually grounded transformation movements focused on a range of discrete social, economic, and environmental issues.

For the most part, these diverse movements do not yet have a strong sense of being part of a larger global movement for spiritual transformation. Some parts of the emerging movement

have articulated compelling visions and strategies for their particular work, but the global movement has yet to articulate a compelling overarching vision and strategy for the movement as a whole.

It is critically important that this nascent movement become self-aware—that is, that the myriad smaller movements develop a conscious awareness of being part of a broad-based and increasingly powerful global movement for broad-scale, spiritually grounded personal and social transformation.

This global movement will energize, empower, and align individuals by enabling them to see themselves not only as part of a particular issue-focused movement working on one of the many challenges facing humanity, but also as part of a much larger, more powerful global movement that, taken as a whole, has a vision for, and is working toward, comprehensive global transformation.

THE MOVEMENT'S CENTRAL FOCUS ON PERSONAL SPIRITUAL TRANSFORMATION

Our goal—and the goal of the emerging global movement—is catalyzing and supporting the spiritual transformation of a critical mass of persons around the world. Over the millennia, the faith traditions have evolved a broad range of spiritual practices that have the proven ability to support profound spiritual transformation. In recent decades, neuroscience, psychology, and other fields of science have also begun to provide important insights into the nature and process of spiritual transformation. It will be important for the movement to draw on and integrate both sets of insights.

The movement must also find effective ways to actively support spiritual transformation on a broad scale. As part of this work, it will be important to develop

invitational strategies to engage individuals at all points in the life span and all stages of the spiritual journey. Given the potential for profound lifelong benefits, it will be particularly important to support the positive spiritual and moral development of children and adolescents.

Many organizations are using secular approaches to support individuals of all ages in developing increased mindfulness, empathy, compassion, and awareness, as well as a more deeply grounded sense of life purpose. By providing a non-spiritual point of entry, such programs may reach many people who would be put off by an invitation framed in explicitly spiritual terms. Further, it seems likely that these secular invitations to engage in serious and sustained inner work will lead many individuals to the deep questions of existence and the human condition that are at the heart of the spiritual journey. This will create the opportunity for us and other spiritually grounded organizations to help these individuals deepen their spiritual search. An important challenge for the movement will be to find constructive ways to collaborate with these organizations offering secular approaches to inner growth.

Finally, it bears noting that while our Theory of Change emphasizes the importance of personal spiritual transformation as a driver of spiritually grounded social change, it is also true that a personal commitment to social

change may be a critical step in, and catalyst for, an individual's spiritual transformation.

THE NEW NARRATIVE

The Inadequacy of Today's Dominant Worldviews

Worldviews drive action. Our worldview is the story we tell ourselves (explicitly or implicitly) about the nature of existence and our place in it, about the purpose (or purposelessness) of life, about what will maximize our well-being and how to secure it, about the nature of our relationship with other people and the natural world, about the preferred social order, and about all the other issues that affect how we choose to live our lives.

Since our worldview is the map we use to navigate the challenges of existence, its usefulness is directly proportionate to its accuracy and completeness. Thus, in choosing among alternative worldviews, the relevant question is not which worldview describes the reality in which we would most like to live, but rather which worldview most accurately and completely describes the reality in which we do live.

Accordingly, a worldview is only as strong as its epistemology. That is, it is only as strong as its understanding of the different ways in which we can gain valid knowledge about the nature of reality. Understanding the strengths and limitations of each

of these ways of knowing is of central importance. If we begin with a flawed epistemology, the inevitable result is a flawed understanding of reality.

In getting epistemology right, the central challenge is bringing the scientific and spiritual ways of knowing into right relationship. The dominant worldviews shaping our current reality fail to achieve this epistemological balance and integration. The proximate result is a failure to recognize the wholeness, sacredness, and mystery of reality. The ultimate result is conflict, fear, suffering, and despair.

In the post-Enlightenment West, intellectuals have enthusiastically embraced the scientific way of knowing while generally giving short shrift to the spiritual way of knowing. The ontological result has been the view that physical reality—matter and energy interacting according to universal natural laws—is the most fundamental reality. On this view, consciousness and the world of spirit are merely transient phenomena arising from the physical realm, and thus have no independent existence as part of the fabric of reality. This leads to an atomistic and determinist worldview in which there is no room for Spirit, the sacred, free will, meaning, or objective moral values.

At the other end of the epistemological spectrum, fundamentalist religious worldviews assert that their particular interpretation of

their sacred texts provides the definitive understanding of both spiritual and physical reality. Any scientific conclusions to the contrary are necessarily invalid. Along with this rejection of science, these fundamentalist worldviews also leave little room for mystery or mysticism—that is, for spiritual knowledge gained through the direct experience of Spirit, and for the cloud of mystery that prevents us from ever knowing Spirit fully.

Somewhere in between is the secular materialist worldview, dominant in the West and with growing influence in the rest of the world. It is largely uninterested in trying to understand ultimate reality, focusing instead on the acquisition of wealth, power, and/or sensual experience. Its epistemology is best described as a superficial gleaning of emotionally appealing concepts from both science and spirituality. Given this lack of a serious epistemology, it cannot give a serious account of the nature of reality, leaving its adherents without a compass as they confront the deep questions of existence and the human condition.

The common thread, as noted above, is a failure to bring the spiritual and scientific ways of knowing into a balanced and complementary relationship, and a consequent inability to recognize the unity, wholeness, and sacredness of physical and spiritual reality, and to acknowledge the ultimate mystery of existence.

The Emerging New Narrative

A far better and more complete account of the nature of existence and the human condition is beginning to emerge, brought forth by a stronger epistemology.

Recent advances in science and the philosophy of science are pointing toward an emerging scientific paradigm that opens up space within the scientific understanding of reality for the possibility of the independent existence of consciousness, free will, and Spirit.

At the same time, globalization is giving rise to a new global spiritual perspective. This new perspective is calling into question the dogmatic affirmations of the many and conflicting fundamentalist religious worldviews. At the same time, it is celebrating the fact that the mystical streams within each of the great traditions have, in their very different ways, charted spiritual paths to a life-affirming and transformative experience of Spirit and an understanding that we do, in fact, live in a sacred reality with love at its core.

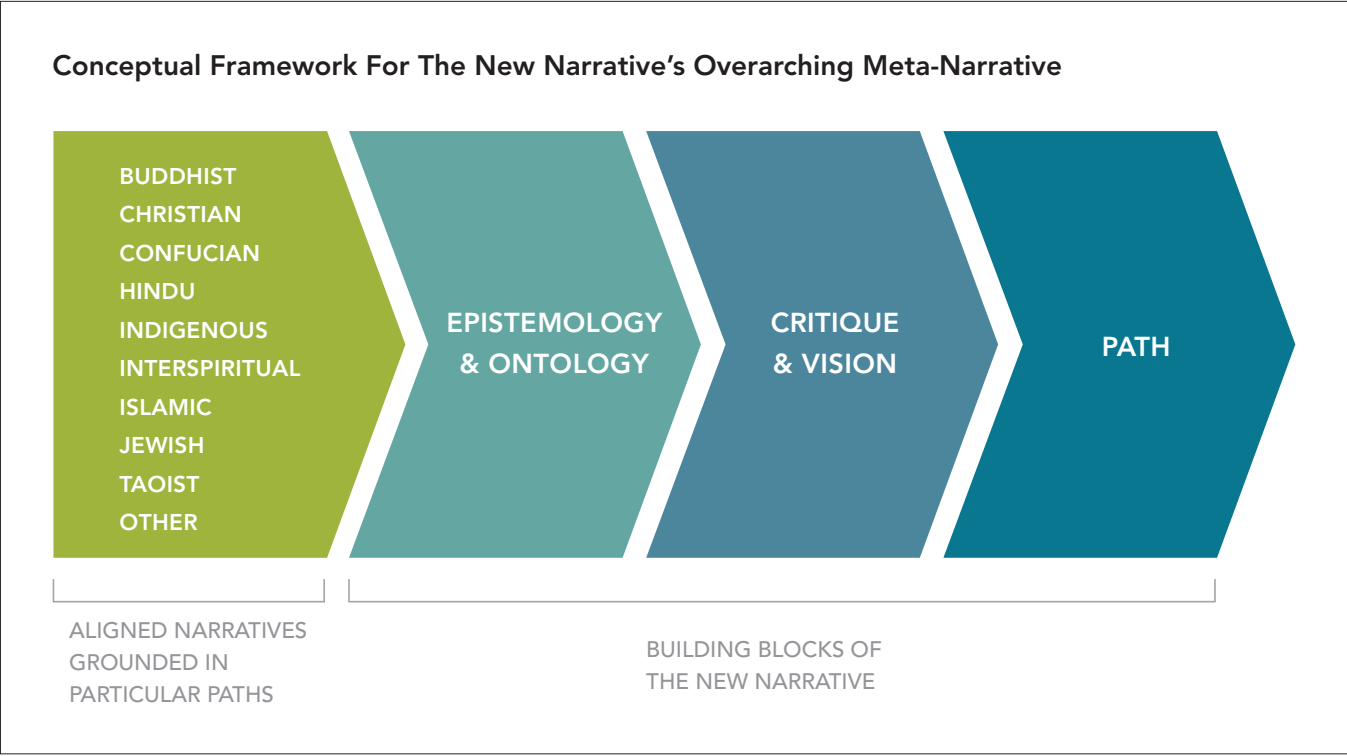
The synthesis of these new scientific and spiritual perspectives is, at last, bringing these two ways of knowing into right relationship. This new epistemology is, in turn, giving birth to a New Narrative that both celebrates science's marvelous new story of the emergence of the cosmos and affirms that Spirit, wholeness, and love are at the very heart of reality. This new

and more complete account of reality lights the path that can take humanity from our current way of being grounded in separation and fear to a new way of being grounded in wholeness and love.

By affirming that reality is sustained by Spirit and has love at its core, the New Narrative provides the new lens through which we can see the deep causes of the needless pain and suffering in our world, envision a new world transformed by love, and chart a realistic path of spiritually grounded personal and social transformation that can carry us toward that vision.

Pulling these thoughts together into an organized framework, we can think of the New Narrative as having five essential building blocks: (1) a new and stronger epistemology, (2) a new and stronger ontology, (3) a comprehensive critique grounded in this ontology of the deep causes of the pain and suffering in our world today, (4) a comprehensive vision of a world transformed by love, and (5) a realistic path to move toward this vision. We believe this New Narrative can provide the spiritual common ground for a true global community and an effective roadmap for a powerful global movement for spiritual transformation.

In thinking about the substance and structure of the New Narrative, it is also important to remember and respect the fact that the faith traditions (as well as spiritual paths outside the traditions) reach this spiritual common ground by very different paths. This means that the New Narrative must be a robust but minimalist overarching meta-narrative spacious enough to embrace aligned narratives grounded in each of the faith traditions, as well as in emerging spiritual paths outside the traditions. The following diagram provides a simple graphic representation.



The Role of the New Narrative in Awakening and Empowering the Global Movement

As noted above, myriad spiritually grounded change movements are emerging around the world but are not yet aware of being part of a comprehensive global movement for spiritually grounded personal and social transformation. Because the New Narrative provides a comprehensive vision for this global spiritual transformation, it has the potential, if clearly articulated and broadly disseminated, to awaken this global movement consciousness.

The Role of the New Narrative in Aligning the Movement

As discussed below, the global movement will necessarily be a decentralized web of highly autonomous individual and organizational actors. The New Narrative can provide the movement with the worldview that organically aligns the independent initiatives of these autonomous actors so that they add up to a comprehensive and coherent movement strategy.

The Role of the New Narrative in Growing the Movement

Finally, by providing a rationally and emotionally compelling personal and global vision, the New Narrative will become a

powerful force drawing new members into the global movement.

THE RELATIONSHIP BETWEEN THE GLOBAL MOVEMENT AND THE FAITH TRADITIONS

The global movement's strategy for engaging the faith traditions must be informed by three realities of our current world. First, each of the traditions provides practices and paths that lead to profound life-affirming personal transformation. Second, each of the traditions also contains extremist, dogmatic, and life-denying paths that contribute to many of the world's most intractable problems and conflicts. And third, for the foreseeable future, a solid majority of people in the world will be on spiritual paths within one of the traditions.

Two key conclusions follow:

- The movement will never reach critical mass to drive significant global transformation without broad participation from within the traditions. Thus, the movement must have an energetic and effective strategy to engage large numbers of people within the traditions.
- To increase the traditions' positive contribution to life-affirming personal and

societal transformation, the movement must support those within each tradition, and particularly those leaders within each tradition, who are trying to shift the tradition's center of gravity away from extremist and life-denying dogma toward the direct, transformative experience of Spirit.

MOVEMENT BUILDING: NETWORK MODEL, LEADERSHIP AND STRATEGY, AND OUTREACH

Network model. The global movement must necessarily be a decentralized web of autonomous members, without a center, centralized leadership, or a formally adopted movement strategy. Provided, as suggested above, that the New Narrative can function as the worldview that aligns the efforts of these independent actors, this decentralized model can be a great strength, since it can empower all members of the movement to take the initiative in leading and serving wherever they are and in whatever way they can.

Leadership and strategy. While the movement will not have centralized global leadership, its effectiveness will be greatly increased if it has multiple leadership nodes, with each

node comprising leaders who can come together to develop a coordinated strategy for their portion of the global web, catalyze initiatives and steer resources in support of this coordinated strategy, and link to and coordinate with other leadership nodes. Some of these leadership nodes will focus on particular sectors (e.g., business, government, healthcare, education), others on particular challenges (e.g., environmental sustainability, peace building, social justice), and others on linking disparate parts of the movement within a particular country or region.

To continue to grow, the movement must also develop an ever-increasing number of committed and effective leaders. Thus, leadership development must be a continuing priority.

Outreach. The movement will also need effective outreach strategies capable of enlisting the committed support of ever-larger numbers of individuals and organizations.

INCLUSIVE SPIRITUAL COMMUNITIES IN SERVICE OF THE GLOBAL MOVEMENT

Given the great spiritual diversity of the global community—and, increasingly, of local communities—the global movement's success will also depend on its ability to help spiritually diverse communities find and deepen spiritual common ground while at the same time honoring the very different paths by which members of the community reach this common ground, and supporting each member in going farther and deeper on his or her particular path. This will require learning a whole new way of being in spiritually grounded relationship with individuals on other spiritual paths. Addressing this challenge must be a top priority.

ENGAGING SCIENCE IN SERVICE OF THE GLOBAL MOVEMENT

The global movement stands in a very interesting and complex relationship with science. In the recent past, it seems that science and spirituality have been at odds more often than in alignment. Yet, as discussed above, the global movement's New Narrative relies on frontier science to create the opening for a scientific understanding of fundamental reality that has room for Spirit, and thus makes possible a new synthesis of the spiritual and scientific ways of knowing. In addition, new developments in neuroscience, psychology, biology, and other fields of science are providing important new insights into the nature and process of spiritual development and transformation. For both of these reasons, it will be vital that the global movement develop the capacity to energetically and productively engage with the scientific community. (See page 19.)

Our Institute-Level Theory of Change

Our Institute-level Theory of Change is our answer to the question "Given the needs of the global movement outlined above, how can we deploy our resources to maximize our contribution to the growth of

the movement?" Our Theory of Change has two parts. The first part focuses on how we will work: what sort of organizational form, culture, and processes do we need to maximize the effectiveness of our support

for the global movement? The second part focuses on what we will do: will we support the global movement in relation to only some or all of the key needs outlined above, and, with respect to those needs that we do

address, what will we actually do to maximize our support for the movement?

HOW WE WILL WORK

The Centrality of Spirit and Our Community of Freedom

Everything we are attempting to do depends on the strength and vitality of our Community of Freedom. Spirit is and must always be at the center of our Community of Freedom. The purpose of our Community of Freedom is to support each other, individually and collectively, in “awakening into and serving Spirit for the transformation of self and society.” Only if we continue to support each other in this hard and never-ending work of personal and communal spiritual transformation will we be able to authentically and effectively go out into the world and support the spiritual transformation of others. Continuing to strengthen our Community of Freedom is essential to this work.

Maximizing Leverage

Our global movement vision and strategy are extremely ambitious in relation to our staff and financial resources—so ambitious, in fact, as to be highly unrealistic unless we can very significantly leverage those staff and financial resources. Accordingly, we must

aggressively use all available leveraging strategies, including the following:

Leveraging the power of bold and compelling ideas. We are already seeing how our overall strategic vision can influence the strategies and resource allocations of other organizations and individuals in ways that bring them into alignment with our goal and strategy. This underscores the importance of continuing to put major emphasis on developing and sharing the most compelling version of our strategic vision.

Leveraging the power of bold leadership. Another powerful source of leverage is becoming widely recognized as a strong and effective leader of the emerging global movement. Our values require us to be a servant leader, but this does not mean that we cannot provide bold, high-profile leadership. Indeed, at the current moment, to be a true servant leader of the global movement requires us to confidently embrace this leadership responsibility.

Leveraging staff resources. Our staff is too small to implement our strategy without very substantial help from outside advisors and consultants, as well as from program partners. Accordingly, learning how to leverage our staff resources most effectively must be a top priority. In designing every project, we need to focus on how we can effectively develop and implement the project with

maximum reliance on consultants, advisors, and partners, and with the smallest possible commitment of our own staff resources. In short, our default must be to directly perform activities that can be performed effectively only by Institute staff, and to outsource everything else. This is a big shift in approach and, therefore, will require a significant reinvention/relearning effort.

Leveraging our resources by increasing the size of the program team. Given the ambitious program strategy outlined below and the resulting need to aggressively outsource tasks to consultants and advisors, it seems likely that we will need a larger program team to coordinate the activities of these consultants and advisors. While this larger staff will reduce to some extent our funds available to support program expenses, this reduction should, more than likely, be offset by our co-investor strategy, discussed below.

Leveraging our financial resources by finding co-investors. It is reasonable to expect that as we become increasingly recognized as a strong and effective leader, we will be able to attract significant co-investments from individual philanthropists and organizational funders who share our vision but do not have our capacity to develop and implement compelling strategies. Attracting these co-investors is an essential element of our leveraging strategy.

Holding the Whole in Service of a Single Goal

A necessary condition for empowering individual initiative while achieving alignment of effort across our organization will be ensuring that all members of our staff understand, at a level appropriate for their individual responsibilities, the substance of and rationale for our overall strategy, as well as how their individual work and the work of their teams contribute to the effective implementation of the overall strategy. Key elements of this “holding the whole” strategy include the following:

Single-minded pursuit of one goal. The most fundamental requirement for ensuring that all of our efforts remain aligned is constantly reminding ourselves that everything we do must be in service of our single overarching goal of “helping to catalyze and support a broad-scale, spiritually grounded transformation from an ego-centered way of being grounded in separation and fear to an all centered way of being grounded in wholeness and love.” This commitment is the ultimate touchstone for deciding whether and how to engage in any activity.

A single, highly integrated strategy. A second key to “holding the whole” will be to understand how our various sub-strategies fit together into a single, highly integrated strategy in service of the global movement.

Everyone understands and owns the whole strategy. As noted above, our organizational effectiveness will be greatly enhanced if we can ensure that all staff understand, at a level appropriate for their responsibilities, our overall goal and strategy and how their work contributes to this strategy. Further, we must go beyond understanding to a strong personal commitment to doing everything each of us can to ensure the success of that strategy.

No distinction between program team and program support team. The historic distinction at the Institute between the “program team” and the “program support team” is directly contrary to the culture and way of working we need to create. We are all members of the program team, because every activity performed by every staff member is essential to the success of our program strategy. If a particular activity does not contribute importantly to the success of our strategy, we shouldn’t be doing it. We are all in this together.

Transparency and the free sharing of information. Transparency and free sharing of information are essential to enabling every staff member to understand and own our overall strategy.

Everyone is a leader. As noted above, a necessary condition for the global movement’s growth and effectiveness will be

its ability to produce an ever-increasing supply of committed and effective leaders. As with all aspects of our work, we will only be able to help the movement meet this challenge if we learn how to grow leaders within our own community. We have already recognized that each member of our staff has both the opportunity and the responsibility to be a leader in living our values and strengthening our Community of Freedom. It is equally important that we learn how to empower each member of our staff to use his or her full creativity, initiative, energy, and passion in finding the most effective way to implement our external program strategy.

Building an Entrepreneurial Culture

As noted above, our goal is audacious, and our resources are modest. Further, our strategy is complex and emergent, and we are implementing it in a complex and rapidly changing world. To succeed under these conditions, we will need to embrace the values, mindset, and practices of successful entrepreneurs. These include out-of-the-box thinking; an instinct for finding high-impact/high-return strategies and programs; continuous innovation; a willingness to take prudent risks, accept failure, and learn from mistakes; and an unshakable commitment to success. Embracing these changes will require another big shift in our culture and practice.

Program teams as social entrepreneurs. We will have a small interdisciplinary team for each of the program initiatives described below. In consultation with senior leadership, these teams will be responsible for developing the strategy to achieve the goal(s) of the initiative, and then to build the team and find the partners and funding to effectively implement this strategy. In other words, the teams will need to function as entrepreneurs in a startup venture. We will need to build the entrepreneurial culture and entrepreneur-friendly systems and processes to support this way of working.

A partner, not a funder. Our commitment to work as a partner rather than a funder is integral to this entrepreneurial strategy. As for any entrepreneur trying to launch an ambitious enterprise, our success will depend on finding and working effectively with the program and funding partners essential to the success of the enterprise. Our commitment to a partnership strategy is also important from a broader, movement-level perspective. A movement is a web of partnerships; an effective movement is a web of effective partnerships. We will only be effective in helping catalyze and support a powerful global movement if our work is animated by a true sense of partnership and if we develop the culture, values, and skills to be a strong and effective partner. In the past, our programmatic interactions

with other organizations too often had the feel of a grantor-grantee relationship, with a strong focus on contractual obligations and legal compliance. To develop the capacity to be an effective partner we will need to make significant changes in our culture and way of working. We need to determine as quickly as possible what these changes are and how to implement them.

A dynamic organizational model. To meet the challenge of implementing a complex and emergent strategy in a complex and rapidly changing world, we will need a dynamic and flexible organizational model rather than a rigid departmental and team structure. A key challenge will be determining what core competencies and expertise we need within our staff, and what specialized expertise we should secure from consultants, partners, and advisors. Another key challenge will be how to define the roles of the program directors in the way that best supports this dynamic organizational model.

Streamlined, flexible, and dynamic systems and processes. To make the shift from a funder culture focused on contractual obligations and legal compliance to an entrepreneurial culture committed to innovation, prudent risk-taking, and effective partnerships, we will need to reengineer many of our core systems, processes, and agreements to make them simpler, more flexible, and more user-friendly, both for us and for our partners.

A commitment to learning.

Given our complex and emergent strategy and the complex and dynamic world in which we are working, we need to become highly effective in using rapid feedback loops and developmental evaluation to continuously iterate toward more effective strategies and programs. Further, to maximize the alignment and effectiveness of our entire team, we need to become highly effective in capturing the key learnings from each aspect of our program work and making these learnings readily available to our entire team.

Using “Tipping Point” Strategies

Many experts in systems change believe that once 15% to 20% of the individuals within a system adopt a new attitude or behavior, the system will “tip” such that the great majority of individuals within the system will ultimately adopt this new attitude or behavior. This “tipping point” insight should inform the development of our program strategies as we work for a broad-scale transformation. That is, we should give priority to working with the innovators and early adopters who can catalyze broader change.

Engaging Local Communities Around Our Mission

Actively engaging the local communities in Southwest Michigan—where we are based—

with our mission is important for multiple reasons. We want and need our families, friends, and neighbors to understand and be excited about what we do. Further, we cannot be authentic and effective in our global work unless we have integrated our commitment to spiritually grounded change into our everyday lives. Finally, if, as we believe, the global movement is emerging, it must be emerging here in Southwest Michigan, and we need to find it and support it.

WHAT WE WILL DO

Using a Broad-Based Strategy that Addresses All Elements of the Movement-level Theory of Change

The movement-level Theory of Change outlined above identifies six essential requirements for the movement's success:

1. Keeping Spirit at the center of the movement and its work.
2. Providing strong support for personal spiritual transformation.
3. Developing and disseminating a compelling New Narrative.
4. Developing an effective movement-building strategy focused on networking, leadership, strategy, and outreach.

5. Nurturing new forms of inclusive spiritual community.
6. Engaging science and philosophy.

In developing the second half of our Institute-level Theory of Change—i.e., “What we will do to maximize our contribution to the global movement?”—the first question is whether to support the movement in all of these areas or in only some. We have decided to provide support in all six areas. Our rationale is that we will maximize our impact by presenting a vision and a strategy that are big enough and bold enough to have the potential to turn the global tide from separation and fear to wholeness and love.

Based on experience, we are confident that we can enlist key thought leaders and organizational partners to work with us in developing such a comprehensive vision and strategy. We are not aware of any other organization working holistically to address this challenge. We think this open field significantly increases the likelihood that the vision and strategy that we and our partners develop will command the attention of a broad audience and attract significant individual and organizational support.

By virtue of adopting this holistic approach, our Institute-level Theory of Change precisely mirrors the movement-level Theory of Change outlined above.

As discussed above, our commitment to keeping Spirit at the center of our community and work animates and guides all that we do. Accordingly, we support the first requirement for movement success—keeping Spirit at the center—not through a separate strategy, but rather through all that we do.

We are committed to developing program strategies to support the movement in each of the other five areas: (1) personal spiritual transformation, (2) the New Narrative, (3) movement building, (4) spiritual communities, and (5) engaging science.

We believe the principles that follow should guide the development of the strategies.

Supporting Personal Spiritual Formation and Transformation

Supporting the positive spiritual development of children and youth. Supporting the positive spiritual development of children and youth significantly increases the likelihood that they will be able to successfully navigate the challenges of adolescence and reach adulthood with a robust and life-affirming spirituality. It also significantly increases the likelihood that they will grow into the young leaders essential to the continued growth of the global movement.

Making maximum use of web-based strategies. Thanks to the Internet, for the first time in

human history we have the ability to give the great majority of people around the globe access to resources that can help them continue to progress on their spiritual journey, whether their spiritual path is within or outside one of the traditions. We need to take maximum advantage of this opportunity.

Supporting and strengthening a global network of spiritual retreat centers. Web-based support for personal spiritual growth is a complement to, rather than a substitute for, the physical places that can invite individuals into a sacred space for spiritual growth and renewal. A robust global network of spiritual retreat centers can make an important contribution in ensuring broad access to these sacred spaces. We are well-positioned to help support and strengthen such a global network, and we should take advantage of this opportunity.

Developing strategies to support integration of spiritual growth and outer action. Our Guiding Purpose clearly states our foundational commitment to supporting individuals in “the integration of the inner life of mind and spirit with the outer life of service in action.” Past and current Institute programs confirm our capacity to do this effectively. This should continue to be a priority in our work.

Producing a “First Draft” of the New Narrative

As discussed above, a clear and compelling articulation of the New Narrative will powerfully support the growth and effectiveness of the global movement in multiple ways. We have already developed a solid conceptual framework for the New Narrative, and we are well positioned to convene and support the thought leaders and faith leaders who, working within this framework, could actually write a compelling “first draft” of the New Narrative. The process of developing this first draft would significantly broaden and deepen our network of relationships with thought leaders and faith leaders. The publication of this first draft would help guide and grow the movement.

Helping the Global Movement to Become Self-Aware and to Grow

We are also well positioned to catalyze and support a range of high-impact program initiatives to help the global movement become self-aware and to grow in size and effectiveness. As noted in the foregoing discussion of the movement-level Theory of Change, taking the New Narrative into the world should make a major contribution to helping the global movement become self-aware. We also have the capacity to support the self-awareness and growth of the global movement through

program initiatives to map the movement, connect movement leaders, help movement leaders and members develop a deeper understanding of subjects relevant to their work, and nurture young leaders.

Supporting the Growth of Communities of Freedom

Continuing to strengthen our own Community of Freedom is fundamental to the effectiveness of everything we do. This must continue to be our top priority. Further, by sharing the story of our Community of Freedom, we can make an important contribution to supporting the development and growth of other inclusive spiritual communities. We can also support the development and growth of these communities by continuing our current mapping work and through initiatives to connect and support the leaders of these communities.

Engaging Science in Support of the New Narrative and Spiritual Formation/Transformation

The Institute is strongly positioned to engage the natural and social sciences, philosophy, and theology in support of the New Narrative, and to draw on the natural and social sciences for new insights into the process of spiritual formation and transformation and the centrality of love to human flourishing. This will involve two distinct and

complementary ways of engaging the scientific community.

The first mode of engagement will focus on bringing together thought leaders from science, philosophy, and theology to explore and articulate the ontology and epistemology of the New Narrative. The emphasis here will be on assessing and synthesizing the current state of knowledge and thought in these key areas. While the primary objective will be articulating the ontological and epistemological foundations of the New Narrative based on the current state of knowledge, an important secondary objective will be to identify the most important questions for further research.

The second mode of engagement will focus on helping to develop strong research strategies to explore these cutting-edge questions and then mobilizing the resources

required to implement these strategies. In some cases, the Institute may provide direct funding for such research. However, given the breadth of our global movement strategy and the modest size of our resources relative to the cost of major research programs, our greater contribution will be to help make a sufficiently compelling case for these research priorities to persuade other funders with far greater resources (both governmental and non-governmental) to fund these research strategies.

Within this proposed Institute-level Theory of Change, our engagement with science will be integrated into virtually all of the proposed program initiatives outlined below. Most significantly, intensive engagement with science would be at the heart of our work on the epistemology and ontology of the New Narrative. The primary

output of this work would be a comprehensive review of the scholarly studies that focus on the non-material dimensions of fundamental reality. A secondary output would be to identify fruitful areas for further research and to make a strong case for funding this research. By playing this catalytic role in helping shape research priorities for the field, we and our New Narrative partners should be able to mobilize significantly greater research funding than we could provide on our own. Fetzer has used this strategy effectively in the past.

Beyond the New Narrative strategy, engagement with science will also be an important part of the spiritual transformation initiative, the mapping initiative, the initiative to build a TED-like platform in support of the global movement, and the sector leadership strategy.



This version of the Fetzer Institute Theory of Change was last updated November 2018.



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