10 Principles of Holistic Policy Design and Analysis

1. Establish the context and Define the problem

What is the problem that the policy is either 1) trying to address/solve or b) trying to prevent? Think of the current situation and elements affecting its creation. What values are being expressed, or not? Is there any mal intent?

2. Find the Underlying Cause

Use a diagnosis to understand that problem's underlying cause – Use the Structured Natural Resource Diagnosis (from Allan Savory), a Root Cause Analysis tool, or multiple.

3. Understand your Direction

Visit and understand/clarify holistic context or vision/mission/desired state, etc

4. The Right People

Are the right people at the table, at the right time for the right reasons?

5. Tools

Review Tools that have been used historically, how they have been used, and other options available

6. Management Guidelines

There are certain guidelines for effective management. Review these guidelines and their associated questions, from the book, *Holistic Management*.

7. Spend time alone

Maintain "the buck stops with me" mentality; literally think about the situation alone. Maintain Deep Reflection, and individually craft a skeletal structure to a policy that will work.

8. Enlarge the Focus

Keep your perspective off of the problem. Ask this exact question: What does the problem prevent the people (in situation/whole under management) from achieving?

9. The Sale

You will need to think carefully about when you sell the policy, to whom, and in what stages. You will always have to sell the policy to someone. There will be a need to bring people into the formation of the policy early on and a need to bring these same or others in at a later point in the process. Strategize. In your sale, remember 1) Evoke Values, 2) Establish Context 3) Delve into Details.

10. Tracking Progress

What will we look at to ensure the policy, once implemented, will be successful? Who will gather information, at what time and what will the results tell us? How do we change the plan accordingly?

Other Critical Points

1. _Bruno Factor_(s) – what/who are they are how are they impacted? These are people/resources that are _the keystones_ to the organization. It may be lowest tier people. Time and again these people/resources are not recognized and efficacy/efficiencies can erode rather quickly without proper attention.

2. Understand particular Chains of Production for enterprises/organization. Provide detail. Have you possibly misidentified the _weak link_? It may be simple to do. If you have misidentified it, then you will have all sorts of other distractions because you are looking at the wrong priority, or you are not clear enough on details of that link.

3. Remember there will be _externalities that you cannot predict_. List as many possible ones as you can. Are these agreeable? Think of five more. What are repercussions for this policy? What or who else might be in the loop that is affected?

4. What is the _opportunity cost_ of time and energy – goes along with Marginal Reaction test.

5. _Lemming Effect_ – some will not voice concerns or criticism for fear that it will affect a position, retirement, job, etc.

6. _Ego_ – whose is in the way or whose ego will be bruised?

7. _Opportunity_ – what other opportunity(ies) do/es the creation of this policy present to the whole, interest groups, or your own smaller network?