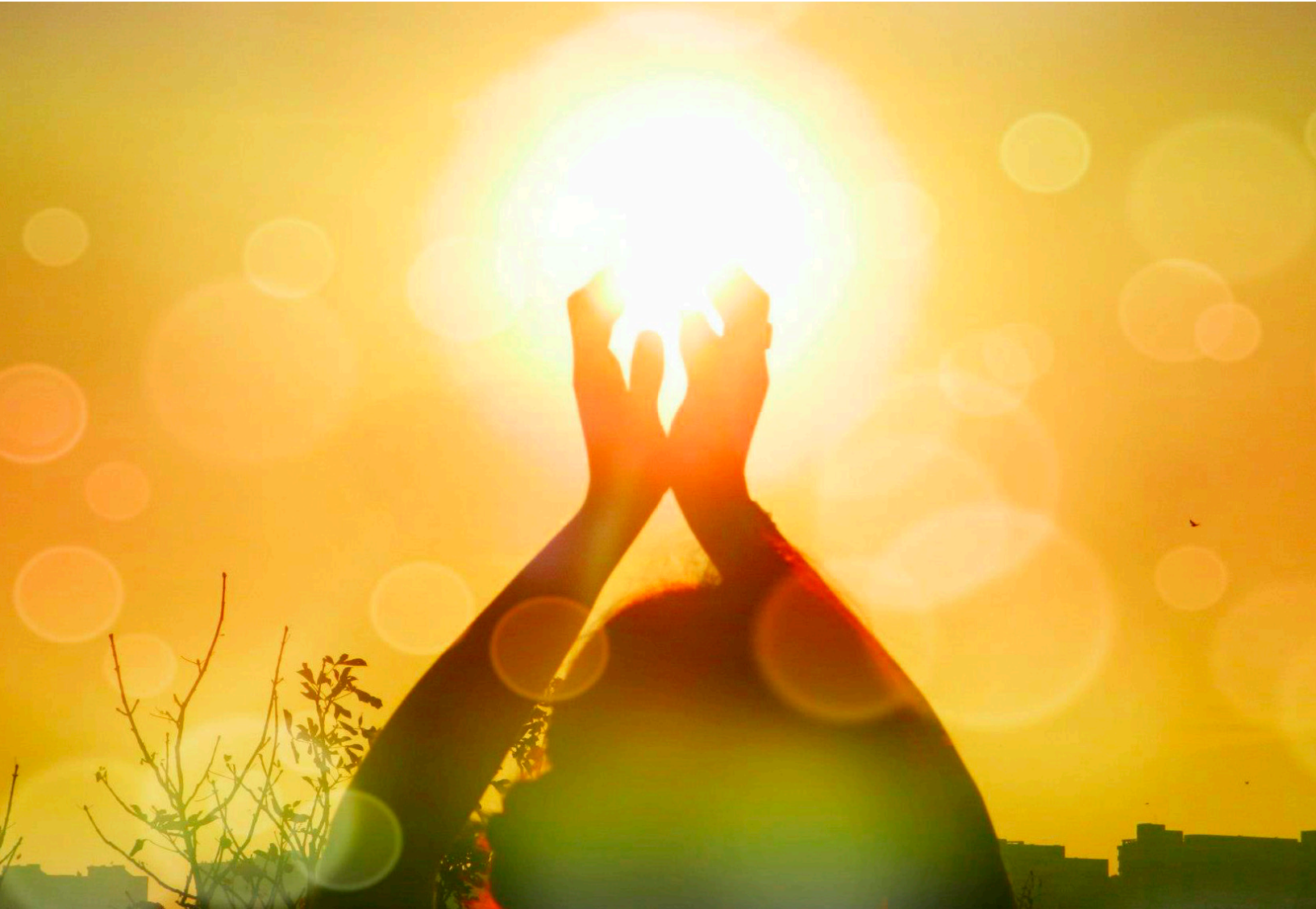




FOUNDATION *for*  
SELF LEADERSHIP  
*Supporting IFS Research, Training & Advocacy*



# PLAN OF ACTION | 2014-2017

(AUGUST 2014)

# This document contains excerpts of the 2014-2017 Plan of Action that the Board of Directors of the Foundation for Self Leadership approved on August 29, 2014.

This Plan is the result of a long deliberation, following analysis of insights and perspectives shared through questionnaires and one-on-one conversations by constituents within the larger IFS community. These include members of the IFS research committees, IFS trainers, and respondents to an open community-wide survey.

The Board thanks all those who contributed valuable comments, which helped refine the plan designed to realize a long-term achieve vision of bringing inner healing and well-bring to individuals and organizations.

No plan is rigid or static. As a roadmap, this plan is no different in the sense that the Board will remain attuned to changes in the external landscape of mental health, wellness, and organizational governance and changing needs of the community. The Foundation's Plan and ambitious goals reflect the best intention and professional judgment of the Board. Such goals are further consistent with the Center for Self Leadership's training mission and vision for bringing Self leadership to the world.

**BRIEF HISTORY & CONTEXT.** The Foundation for Self Leadership was incorporated as an independent nonprofit entity in the State of Illinois in 2001 to support the promotion of the Internal Family Systems (IFS) Therapy through the dissemination of research and training scholarships. The Foundation was activated in 2013 and a new board of directors was formed and introduced at that year's IFS Conference, where the inaugural annual Gala was hosted and a number of volunteers recognized.

The creation of a plan of action constituted the Board's first major task, which it completed in nine months. The professional diversity of the Board facilitated the development of a broad vision and establishment of strategic priorities for building the infrastructure for research, motivating independent IFS-oriented research in areas of mental health that meet significant needs within the United States and globally, and broadening the scope of IFS beyond psychotherapy.

The Board has benefited from invaluable insights generously shared by Richard Schwartz, PhD, Founder of IFS Therapy, and Jon Schwartz, MA, Executive Director of the Center for Self Leadership (CSL). The Foundation will continue to collaborate with a number of stakeholders, among them CSL and all IFS training sites within and beyond the U.S.; the community of IFS trainers and trained IFS psychotherapists and practitioners; and other entities around the world that shares its vision and values.

We do our work as a foundation on behalf of many anonymous individual patients and clients, who have benefited from IFS therapy, individuals who have discovered inner wisdom and harmony and a clearer view of the world around them through the IFS model; and all future individuals and organizations that will benefit from IFS as a paradigm for better living and governance.



## STATEMENT OF PURPOSE

### **VISION.** Healing, Well-being, and Self Leadership for All

Dedicated to deepening the impact of IFS as both a psychotherapeutic modality and a paradigm for better living, the Foundation for Self Leadership serves, and partners with, individuals and communities from around the globe, regardless of geography, demographics, culture, or personally held beliefs.

We envision and strive to support a world in which individuals behave and interact using inner resources of Self Leadership, identified by IFS, as a new paradigm for healing and living, bringing acceptance, compassion, and safety to each of us and, by extension, to the communities in which we live, including those with limited financial resources.

As a result of our collective efforts, the IFS treatment protocol will be recognized as an evidenced-based standard commonly used to improve mental health and guide the process of healing and emotional well-being.

Beyond psychotherapy, IFS will evolve into a widely accepted approach for promoting mindfulness, physical health and spiritual well-being among individuals; and for ushering effective governance and organizational well-being in various domains, among them business, law, education, as well as community-building within and across neighborhoods and nations.

## MISSION. Supporting IFS Research, Training, and Advocacy.

Toward realizing this multi-faceted vision within the healing professions and among people as an effective tool for better living, the Foundation will endeavor to accomplish three tangible goals:

1. To support Research in order to establish IFS as an evidence-based practice within psychotherapy and beyond, promoting Healing, Well-being and Self Leadership.
2. To broaden access to IFS trainings through Scholarships for students and individuals with limited financial resources.
3. To engage in Advocacy and outreach on behalf of IFS, with the intent of expanding its reach within and beyond psychotherapy in the global community as a new paradigm for better governance and living.

To advance these goals, the Foundation will build an operationally adequate infrastructure and support an ongoing fundraising effort, involving core volunteers and a lean staff, and will remain flexible and agile in response to emerging opportunities and changes in the external landscape.

*See Appendix for a pertinent view of the IFS Universe as interpreted by the Board.*



## **OUR PROMISE, PHILOSOPHY & VALUES.** Embody a Self-Led Organization.

The Foundation's Board, in order to realize our stated goals, aspires to develop an exemplary "Self-Led Organization." Operating in accordance with the mindfulness-based IFS model, which is an integration of systems thinking and multiplicity -of-mind theory, we embrace our common humanity, openness, and desire to serve the greater good as a framework for deliberation and decision making.

We strive to conduct our board meetings and all our activities alike with a high level of curiosity and a strong desire for collaboration. We will take time to establish a safe space for difficult conversations, gently guide each other to a place of inner calm and clarity when we are emotionally triggered, and treat protective voices and opinions with empathy and no judgment. We believe it is the responsibility of each member of the Board to ensure that our discussions are held in a climate of compassion and care.

We will engage in all activities and practices, mindful of what binds us, welcoming of our differences, open to hearing from and speaking for our individual parts, and determined to uphold high standards of integrity and transparency in decision making.

We will work closely and collaboratively with the Center for Self Leadership, the greater community of IFS practitioners, and other partnering organizations aligned with our vision and values, to make key strategic decisions that validate and expand the role of Self Leadership for all people across the world.

*[The Board has also approved a statement governing how it will conduct its meetings and deliberations. This pledge will be posted on the Foundation's website under Values.]*



# OBJECTIVES & STRATEGIES



In support of Research, toward establishing IFS as an evidence-based practice, the Foundation will promote and fund high-quality IFS-based academic and clinical research across a broad spectrum of professional applications and in areas that promise high public value.

**IFS Adherence Scales.** We will fund and oversee the effort to identify, validate, and refine the IFS fidelity-coding for use in psychotherapy clinical research (Year 1 | In progress). This will be considered a first effort in what may evolve into a series of fidelity scales to be used in a variety of research applications as pertinent (Year 2 and beyond).

**Research Review System.** We will establish and implement a transparent, unbiased system for reviewing research grant proposals involving a council of independent Advisors, with input and participation from members of the newly-formed “Research Development Team,” and within established areas of priority—see Research Priorities below (Year 1). *[The Foundation will not attempt in any way to influence the results of the research, will endeavor to avoid any perception of influence, and will maintain at all times a hands-off approach when it comes to the actual research.]*

**Research Priorities.** We will determine areas of research funding priority and endeavor to support research projects within them. Lead among these areas of priority for the foreseeable future are research on the efficacy of IFS in treating individuals suffering from trauma, depression, and anxiety:

1. Effects of IFS on PTSD & Traumatic experience
2. Physiological Effects of IFS
3. Effects of IFS on Anxiety & Depression
4. Emotional Wellbeing & Broader Impact of IFS.

In order to implement these priorities, we will establish and facilitate partnerships with prominent researchers and research centers, both private and public including VA medical centers in the U.S.; invite research projects that involve neuroscience and brain imaging; and support the development of grant applications involving IFS research.

**Research Resources.** We will facilitate the establishment of research materials and platforms that would be of value to independent researchers seeking to engage in IFS-oriented research. Among these products and programs, we will establish:

**Searchable Online Library.** We will sponsor the development and maintenance of an annotated, searchable library of IFS resources organized by the Research Development Team and link up to the comprehensive IFS bibliography to be developed by CSL. (Years 1-2)

**Online Research Portal.** We will develop a web-based research portal connected to the Foundation’s website, which provides news and resources about IFS research with the help of the Research Development Team. (Year 2)

**National Registries.** We will support the submission of applications to national evidence-based practices and programs, starting with SAMHSA’s NREPP. (Year 1 | NREPP Submission completed)

**Research Database.** We will develop and maintain a research database comprised of institutions and individuals interested in conducting and/or being a part of IFS research. (Years 1-2)

**IFS in Academia.** We will explore new ways to introduce professors in the psychological sciences and psychotherapy to IFS and invite their graduate students to participate in IFS research. (Ongoing)

We will engage the Research Development Team in this effort and remain open to supporting and developing new projects, not listed in this plan, which are fully consistent with our mission and vision and promise to bring greater benefits to our work or visibility to IFS. (Ongoing)

# 2.

In support of Broadening Access to IFS Trainings for those individuals and agencies with limited financial means, the Foundation will develop and fund a comprehensive Scholarship program.

**Scholarship Endowment Fund.** We will raise an endowment fund in support of the scholarship effort. (Ongoing)

We will set up a funding target for scholarships per year and establish the endowment percentage policy.

**Criteria for Awarding Scholarships.** We will establish and disseminate criteria for granting scholarships for sanctioned IFS trainings and other IFS-focused continuing education activities managed by various organizations. (Years 2-5)

We will review and incorporate CSL's policy for scholarship evaluation and dissemination (Years 2-5)

We will identify training programs in Mental Health Agencies eligible for scholarship funds. (Years 2-5)

**Local Engagement.** We will target and set up regional fundraising programs and nomination efforts dedicated to scholarships. (Years 3-5)

We will reach out to the New England Annual Steering Committee Meeting and interested parties within the U.S. and internationally. (Years 2-5)

We will form an IFS Scholarships Team to provide assistance and support in this effort.

# 3

In support of Advocacy, the Foundation will advise, support and collaborate closely with the Center for Self Leadership and the community of IFS practitioners to expand the vision of IFS as a new paradigm for living.

**IFS Communication Campaign.** We will consider funding a broad public relations campaign about the Foundation and IFS. (Years 2-5)

We will gather/produce as an example a collection of stories, printed material as well as videos demonstrating the benefits of the IFS Model for the general public.

We will support an active social media platform around the Foundation and IFS.

**Supporting New Programs and General Trainings.** We will support the development of Self-leadership-oriented programs in organizational governance and businesses and the promotion a training program organized and administered by CSL for the general public.

**Supporting IFS Technologies.** We will support a project that helps bring technologies to IFS, increasing access and usability for the general population.

**Energizing the Community.** We will help expand the IFS circle beyond psychotherapy and energize the IFS community.

We will engage volunteers to help with important jobs and activities and identify a Recognition and Rewards program necessary to maintain the involvement community. (Year 1 and ongoing)

We will develop partnerships with other foundations and organizations that share complementary missions and visions. (Year 1 and beyond)

We will form an IFS advocacy Team to help us fulfill these objectives. We will further partner with organizations that share the Foundation's values and vision and engage in joint initiatives that would promote IFS applications in various settings.



# Operational Structure

In order for the Foundation to achieve its goals, the following operational infrastructure will be developed.

**Leadership.** We will establish and maintain a fully functioning Board of Directors, which include founding members for a two-year term, to be followed-up by an appointed Board for Years two and beyond. We will grow the Board by seeking individuals who are leaders in their professional fields and who share the values aspired by this Foundation.

**Staffing.** We will work to develop and fund as appropriate competent professional staff for the Foundation over time.

**Areas of Interest.** We will establish an organizational structure that will help broaden the vision and scope of IFS along a continuum, to promote healing on one end and overall well-being on the other.

*HEALING.* Guiding individuals to achieve emotional healing involves psychotherapy and mental health-related activities; this requires the process of emotional “unburdening” as a component of the IFS work (see Healing-to-Well-Being Continuum).

*WELL-BEING.* Achieving a wholesome state of well-being beyond psychotherapy has many facets. These include, for individuals: medical health, education, and spirituality; and for organizations: self-led practices in business management and organizational development, mediation and law, politics, and education. These areas may or may not include unburdening as defined by the IFS model.

*PARADIGM FOR BETTER LIVING.* IFS as a paradigm for better living and stronger relationships can facilitate good parenting, harmony among couples, and cohesive families and communities, even more enjoyable team sports. Such applications do not include unburdening, but allow for an expanded understanding of internal our internal processes including Self Energy and our parts.

*SELF LEADERSHIP* is the foundation supporting all components of the work. Each of these areas of application may have a research, scholarship, advocacy and fundraising component to it.

*[See Appendix for the Universe of IFS applications as interpreted by the Board.]*

**Leadership & Support Teams.** We will lead the formation of the “Research Development Team,” whose members consist of invited volunteer members of the IFS Community, define its role, function, and close working relationship with the Board. The Team will engage in activities to help realize the Goals of the Foundation in the Promotion of IFS Research. Areas of interest will include development of adherence scales, maintaining the annotation effort, identifying new research directions and establishing contacts with prospective IFS researchers, and tracking interest in IFS research. We will further help establish “Affinity Groups” as needed.

**Advisory Council.** We will establish an independent Advisory Council, with expertise in, research, legal, foundational development and fundraising.

**Communications.** We will keep the community abreast of the Foundation’s progress, produce an annual report showcasing pertinent developments in IFS research and training and acknowledging donors, and regularly solicit input from the community of practitioners and researchers. We will further help set up a mechanism with CSL for following up regularly with individuals attending IFS workshops or lectures who express interest in the mission of the Foundation.

**Governance.** We will periodically review and update the Foundation’s Bylaws, and Policies, and do our due diligence regarding legal and financial obligations.

**Transparency.** We will seek legal counsel where pertinent to establish conflict of interest and compliance statements for Board members, and publish such statements on the Foundation’s website.

**Collaboration with CSL.** While we maintain our organizational independence, we will continue to seek consultative and administrative support from CSL as well as from partnering organizations and volunteers within the IFS Community.

## ORGANIZATIONAL DEVELOPMENT

A separate fundraising plan will be developed to support, and as a companion to, the strategic priorities. The plan will incorporate strategies and specific implementation timelines. This is a macro-view of the fundraising initiative.

In order to support the Foundation, we will set up and administer an ongoing fundraising program.

**Consultation.** We will seek consultation to establish the fundraising strategy consistent with our priorities. (Year 1 and ongoing)

**Funding Goals.** We will set up target fundraising goal for immediate (2014-2016) and for long term (2016-2020).

**Case Statement.** We will craft a funding case statement that provides compelling reasons to give to advance IFS. (Year 1)

**Database.** We will set up and maintain a robust fundraising database (may be different from research database). (Year 1 and beyond)

**Funding Strategy.** We will determine a methodical fundraising approach to meet the target goal. (Years 1-2)

# The IFS Universe: Promoting Self Leadership for Inner Serenity and Global Peace

HEALING ← ————— WELL-BEING ————— → PARADIGM FOR LIVING

Through the Professions					Through Direct Public Outreach			
HEALTHCARE		EDUCATION & HUMAN SERVICES		GOVERNANCE	LAW, POLITICS & PEACEMAKING	FAMILIES & PARENTING	RELATIONSHIPS	COPING & GENERAL EMPOWERMENT
Mental Health	Physical Health	School Counseling	Social Services	Business Management & Organizational Development				
Treating PTSD & Effects of Trauma	Health Coaching	Dealing with Bullying Issues	Shelters & Homelessness	Executive Coaching	Mediations & Arbitration	Adolescents Counseling	Couples Counseling	Life Coaching
Treating Anxiety & Depression	Treating Autoimmune Diseases	Dealing with Issues Relating to Sex, Drugs & Alcohol	Care for Military Veterans	HR Trainings	Prisoners' Counseling & Re-entry	Senior Care	Mediating Family Feuds	Self Help: Adults
Treating General Addictions	Pain Management	Hyperactivity & Attention Deficit	Domestic Violence & Women Shelters	Personnel Crisis Management & Communication Consulting	Resolving Issues with Gangs & Neighborhood Tragedies	Overcoming Crises at Home	Strengthening Business Partnerships	Self-Leadership for Young Adults (Mobile Apps)
Treating Eating Disorders	Self-Leadership for Young Adults (Mobile Apps)	Building self-esteem and self-confidence	Soup Kitchens	Leadership Training Programs	Post-War Reconciliation - Generational Healing & Forgiveness	Instituting Peace and Harmony at Home	Resolution of Community Conflict	Personal Growth & Development

SIMPLIFIED CHART - PROMOTING & EXPANDING SELF LEADERSHIP			
HEALING ←		WELL-BEING	→ PARADIGM FOR LIVING
WITHIN PSYCHOTHERAPY (UNBURDENING)		BEYOND PSYCHOTHERAPY	
MENTAL HEALTH	PHYSICAL HEALTH		
PTSD Anxiety Depression Addiction	Medical Condition	Health Coaching Business Mediation Law Prison Reform Higher Education Spirituality & Meditation	Parenting Couples Families Schools Sports

