

**BRIGHT WAY ZEN****RESEARCH ON STRATEGIC PLANNING AND VISION/MISSION****RESEARCH MEETING NOTES BY LORNA SIMONS ON STRATEGIC PLANNING/VISION/MISSION****Meet Bartt Brick about 12/26/16**

Background: During a career at U.S. Bank, he managed many different programs and was frequently involved in strategic planning.

One approach is to discuss a strategic plan first, then let the mission unfold from that. Otherwise, you might find things you put in your strategic plan aren't actually what you do.

**STEPS (a series of questions)**

1. In 5 years, I will be most proud of my organization if it:
2. In 5 years, I will be most disappointed in my organization if it does not:
3. SWOT: strengths and opportunities; weaknesses and threats
4. Practical aspects, in our case probably
  - a. Space
  - b. Finances
  - c. Spiritual: more and wider variety of activities; actively recruit new members
5. Identity: three big ideas that will define the organization in 5 years.

(Continued on next page for graphic.)

**THREE-PILLAR AND CAPSTONE PLANNING SCHEME**

For each pillar, choose a strategic goal. How would each goal make us feel proud and failure to reach it disappoint?

Then discuss:

1. How do we measure success?
2. How do we raise money to support this goal?
3. Three tactics to achieve this goal.

**THEN:** In the capstone, write a description of what the organization looks like and what it represents as it fulfills these three goals. One often finds that the actual goals discussed allow you to realize, "Oh, THAT is what we are really doing" rather than what you may think you are doing.

What do we look like and what do we represent at we fulfill these goals?

GOAL 1	GOAL 2	GOAL 3

**EXAMPLE:**

Goal: Increased dharma activities

How do we measure success?

How do we raid money to support the goal?

Three tactics:

1. Design the activity
2. Get the staff
3. Publicize

**CRITICAL NEED: Do no let anybody be left out of the process, you need buy-in.**

**Goal of the planning/visioning process:** To create a management strategy that most successfully positions us for success in our strategic goals.

**Potential stumbling block:** Some people want to retreat from practical considerations.

**If we plan to associate with other Zen groups:** What would our responsibilities be?



#### **MEETING WITH ANNIE HEART OF FAMILY BRIDGE.**

Annie is the executive director of Family Promise, a homeless family day shelter in Hillsboro. She said she could meet with us if we'd like.

Mission: What are our goals?

Strategic Plan: How will we support those goals?

Decisions to be made:

1. Who needs to be involved?
2. What outcomes do we want?
3. Who will benefit from what we do?

Will donations be a requirement of membership, as that affects the non-profit aspect? Always has to be suggested donation.

Do we have By-Laws? Yes. Need to review them.

If registered as a non-profit, need an annual review by a CPA. In-kind donations need to be tracked on the books, which includes volunteer hours at an hourly rate, grants. Volunteers need to keep a log of what they did and how long it took.