



Strategic Plan Executive Summary

2017-2020

Adopted by the Board of Trustees, July 15, 2017

Executive Summary

The Board of Trustees (“Board”) for the Center for Spiritual Living San José (“Center”) initiated a Strategic Planning Project in April, 2016 with an anticipated completion of mid-2017. The projected timeframe for the strategic plan is ~3.5 years (2017 through 2020). The Strategic Plan Report (Report) is the final deliverable of Phase 2: Strategic Plan Development, and it represents nearly 2,000 person-hours of combined work undertaken by the Values Based Organization Assessment (VBOA) Team, the Phase 1 Strategic Planning Research Team, and the Center’s Board of Trustees and recent Trustees Emeriti.

Foundational to developing the Center’s first-ever Strategic Plan, the Board examined and re-confirmed the Center’s Organizational Vision, Mission, Purpose and Values:

Vision: A World That Works for Everyone

Mission: We Ignite Transformation Through Spiritual Living

Purpose: Transform Lives, Build Dreams and Reveal Love

Statement of Being

We believe that life is good, that God is all there is, and that love is the only power. We are a welcoming and inclusive community of inspired individuals caring for and about each other and the entire planetary family, bringing the gifts of active compassion and kindness to the world. Our purpose is to transform lives, build dreams, and reveal God through education, music, prayer, service, generosity, and play.

Core Values

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|----------------------------|---------------------------|
| 1. Spiritual Living | 6. Continuous Improvement |
| 2. Accountability | 7. Education |
| 3. Coaching and Mentoring | 8. Humor & Fun |
| 4. Community Collaboration | 9. Integrity |
| 5. Community Service | 10. Love |

Why a Strategic Plan?

The purpose of a strategic plan is to intentionally focus the **precious energy and resources** of an organization so that **talent, time and money** are most **effectively and efficiently utilized for the greatest impact**, in support of shared vision, mission, values and purpose.

Strategic Plan Goals

The Report outlines five strategic goals intended to direct and guide Center activities for the 2017 – 2020 timeframe, along with proposed tactics and metrics to measure progress toward each goal. These five goals, together, are the strategy to move the Center closer to its Vision.

The strategic plan developed by the Board, in support of the Center's Vision, Mission, Purpose and Values, sets forth that **by the end of 2020 the Center...**

1. Is a vibrant, thriving spiritual organization energized and operated by a highly effective team of Board of Trustees, ministers, practitioners, staff and volunteers, each striving to fulfill the mission, purpose, vision and values of the Center. (*People*)
2. Provides a robust educational platform that offers quality and diverse facilitators and subjects for a deeper understanding of Science of Mind, in an environment (in-person, virtual, and online) that invites purposeful, transformative and enriching experiences that foster a richer relationship with God, spiritual and personal development and transformation. (*Education*)
3. Provides a wide variety of ways to engage, participate and volunteer through multiple offerings and opportunities to connect and be of service to others. (*Engagement*)
4. Circulates abundance throughout the Center, reflected in the thriving interdependence of our finances, our people, and our relationships. (*Abundance*)
5. Is a hub of local area, community-based events and activities that support personal and community transformation, through involvement and visibility in the surrounding geographic community, across all boundaries and groups. (*Hub*)

This plan is built upon the findings from Phase 1: Investigation and Research. The final report from this phase was published on January 3, 2017, and covered six areas: demographics for Santa Clara County; geographic community issues and agencies; similar church offerings, projects and best practices; marketing best practices; current available technologies; feedback and suggestions from the Center congregation. Each of the six research areas provided a wealth of information and opportunities for the Center's future direction.

In Phase 2 – Strategic Plan Development - the Center's Board and recent Emeriti sought to understand the larger context within which the Center exists (demographics, societal challenges, micro and macro church trends, congregant priorities and desires) and sift through the abundance of opportunities to select and prioritize a subset of focus areas and possibilities that represent what they believe to be the best path for the Center for the next ~3.5 years.

Preceding the Strategic Planning process, the VBOA project took an in-depth look at our internal operations, and created the definitions for the 10 Core Values identified through our organization-wide values assessment. The VBOA findings were utilized in the development of the Strategic Plan.

Please note: No specific programs, such as Youth & Family, Music, Compassionate Care (and others) are mentioned in this Strategic Plan. This is intentional. The programs are a part of, and are woven into, the five overarching goals presented.