



# **Strategic Plan**

## **2017 - 2020**

July 15, 2017

**\*\* Final Version \*\***

Developed by  
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Center for Spiritual Living San José  
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## Executive Summary

**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.

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). This report is the final deliverable of Phase 2: Strategic Plan Development, and it represents over 400 hours of combined work undertaken by the Center’s Board members.

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 Emeriti sought to understand the larger context that the Center exists within (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.

**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 that are presented here.

# History of the Center for Spiritual Living, San José

## The Early Years (1950s – 1970s)

The First Church of Religious Science of Greater San José, currently known as the Center for Spiritual Living San José, began its life in 1954 as the Science of Mind Fellowship. Originally, the group gathered to listen to the talks given by Dr. Dan Custer each Sunday morning. These talks were transmitted by phone line from the Geary Theater in San Francisco.

Soon, however, the congregation prevailed upon Dr. Custer to send his assistant minister, Dr. Wayne Kintner, to preach to the congregation each Sunday. As attendance grew a headquarters was established at 142 West San Carlos, by-laws were drawn up, and Dr. Kintner became the church's founding minister. Soon the church requested affiliation with the United Church of Religious Science and it was chartered October 25, 1956.

Attendance continued to grow, and the search began for a permanent location. On Christmas day, 1958, the congregation held its first service at its new location – 945 Willow Street. Dr. Kintner continued to lead the congregation until 1965. At that time Dr. Robert Scott became the church's new minister. The church moved to its current location at 1195 Clark Street in 1974.

## Continued Expansion (1980s – 1990s)

In 1981 Dr. Scott founded the School of Ministry in San José with his friend Dr. Jack Holland. He continued to lead both the church and the School of Ministry until he made his transition in 1985.

Rev. Carole Price began her work at the Center in September 1985. She thus became the third minister to serve the First Church of Religious Science of Greater San José in its then-32-year history. Under her direction, the Center became one of the largest churches in the denomination, and reached out to the community with the message of Religious Science. Rev. Carol Price left the San José ministry in 1992.

March 1993 marked the arrival of the fourth minister, Dr. Lloyd George Tupper. Subsequently, Rev. Bonnie Apps filled the minister position at Center for Spiritual Living from May 1996 through June 1999. Rev. Dr. David Bruner became the sixth minister – Senior Minister and Spiritual Director - on December 19, 1999. At that time, the Center had a staff of three.

## The New Century (2000 – 2017)

Significant growth and many positive changes have occurred since 1999. Average Sunday attendance, average Sunday donations and membership have steadily increased.

	<b>2001</b>	<b>2006</b>	<b>2012</b>	<b>2016</b>
Avg. Sunday Attendance	242	309	477	452
Avg. Sunday Donations	\$5,195	\$5,749	\$7,010	\$8,029
Membership	226	321	355	471

Several significant remodels were undertaken in 2001, 2006, 2009, 2011 and 2013 involving Fellowship Hall, sanctuary, office areas, Ernest Holmes room, conference room, and bookstore. The creation of the Sacred Space Garden and labyrinth was completed in 2013. In addition, new projectors, screens, chairs, paint, flooring, windows, sound systems and stage lighting were installed. Technology milestones include the installation of Center-wide wireless wifi in 2008, launch of Livestreaming in 2013, and installation of solar panels in 2015.

Also in 2015, the Center sold property on Delmas Avenue, allowing the Center to pay off the minimal debt that existed, and to establish the Center's first Facilities Reserve Fund. Subsequently, a reserve study was conducted of the entire property toward developing a 20-year plan for the building and facilities.

By early 2017, the Center had a full- and part-time staff of 12, including an Associate Minister, an Assistant Minister and four Staff Ministers. In addition, the Center is supported by over 40 licensed Religious Science Practitioners (RScP) and approximately 200 active volunteers.

## **Organization Vision – Mission – Purpose – 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.

### **Values**

#### Spiritual Living

We practice the spiritual principles of our faith consistently, through which we experience the presence of Source in, around and through ourselves, each other, and the entire planet. We cultivate a personal relationship with Source that we may know our own Divinity.

#### Accountability

Accountability is the outward expression of our integrity. We clearly define and articulate expectations and measures of success, and openly evaluate and share results, communicating in a non-judgmental and respectful manner.

#### Coaching and Mentoring

We help each other explore varied options and perspectives to uncover our own wisdom, build confidence and feel empowered to create our best life possible. We share our experience, expertise and knowledge in a safe and supportive environment to help each other learn, develop and grow.

#### Community Collaboration

We embody the spirit of teamwork to share resources, achieve desired results, and continuously improve. We share a common vision, mission, and goals, focusing on the highest possible good for the Community and our Center.

#### Community Service

We demonstrate our loving intentions and care for others through service to our Center and neighboring communities. We gratefully express our talents, we love doing good work, and we enjoy the satisfaction of teamwork and accomplishment.

#### Continuous Improvement

We identify opportunities and take action to reach our full potential, spiritually and practically, individually and as a community. This transformation expands individual consciousness, constantly evolving and improving a Center that works for everyone.

### Education

As a life-long learning community committed to personal growth and spiritual transformation, we provide classes, workshops, activities and events that help us live, powerful, purposeful and prosperous lives.

### Humor & Fun

We practice the art of lightheartedness, welcome playful enjoyment, and cultivate a positive outlook, reminding us that nothing needs to be “fixed,” and all is well.

### Integrity

Integrity is our personal, internal compass. Our thoughts, feelings, words and actions are visibly and consistently aligned, demonstrating to one another our principles and values, and how we want to be remembered.

### Love

God is Love. We are God/Source expressing as Itself. Therefore, we are Love. When we come from Love as our most basic foundation, we co-create a community and a world that works for everyone.



## Strategic Planning Process

The Center's Strategic Planning Project was kicked off by the Board (then called the CORE Council) in April, 2016. The Project has three phases:

1. Investigation and Research: May – December, 2016
2. Strategic Plan Development: January – May 2017
3. Plan Rollout and Implementation – June 2017 and ongoing

Phase 1 was conducted by a team of 27 volunteer team members<sup>1</sup> and entailed over 900 hours of volunteer time. Each volunteer selected two of the following six focus areas to investigate.

- Demographics: Analyzed demographic information for Santa Clara County, and for members and survey respondents from the Center
- Community: Researched the societal challenges that Santa Clara County faces through interviews and online research<sup>2</sup>
- Church: Investigated other churches of various denominations through site visits, interviews and/or websites. In addition, research was conducted in macro-level church trends through an extensive literature search<sup>3</sup>
- Marketing: Researched current marketing trends and compared the marketing techniques of other churches and the Center
- Technology: Investigated available technologies to assist the Center, primarily through online investigation and reading
- Internal: Analyzed congregant survey responses and feedback; analyzed geographic location of Center donors. This topic area included feedback and findings from the Values Based Organizational Assessment conducted in Q1 2015 – Q1 2016.

Focus area subteams defined target subjects and individual responsibilities. Throughout the research timeframe, individuals wrote up reports to document their learning from a specific interview, or church visit, or survey analysis, or whatever was appropriate for that topic area. In December, the subteam information was combined with additional analysis and extensive online research to produce the report published in January, 2017.

Phase 2 – Strategic Plan Development - was conducted by the Board of Trustees, along with recent Board Emeriti, for a total of 10 people<sup>4</sup>. From January – May 2017, this team spent seven half-day meetings plus homework, totaling over 400 person-hours of reading, visioning, brainstorming, discussion, writing, prioritization and refining the Center's strategic goals (including tactics and metrics) for the next ~3.5 years. This report is the synthesis of that work.

Phase 3 – Plan Rollout and Implementation – will begin in June 2017, and continue throughout the coming years. This phase will involve the Board, the Center staff and key volunteers. In addition, the strategic goals and tactics will be communicated to the Center members and congregation. A strategic plan “review and refresh” activity will be included annually as a vital part of each Board year, and will feed into the annual budgeting process.

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<sup>1</sup> Strategic Plan investigation and research team members are listed in Appendix C

<sup>2</sup> A list of community organizations interviewed, visited or researched can be found in Appendix D

<sup>3</sup> A list of churches interviewed, visited or researched can be found in Appendix D

<sup>4</sup> Strategic Plan development team members are listed in Appendix C

## Strategic Goals – Tactics – Metrics

The strategic plan is 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 our 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*)

These five goals together are the strategy to move the Center closer to the organizational vision. Each of these strategic goals will be discussed in greater detail in the following section, and has a Board member assigned to oversee and champion progress toward these goals<sup>5</sup>. A list of all tactics, sorted by initiation year and functional ownership, is found in Appendix A.

### Terminology

- A goal describes a desired end state. Groups of goals form a strategy.
- Tactics are stepping stones, specific efforts or actions toward the goal. Each tactic has a functional owner within the organization (e.g., Finance, Education, Programs, etc.) and they are listed by the year of proposed initiation, i.e., the year in which activities related to that tactic should begin. In some cases, there are already efforts underway related to that tactic. These are noted with “[already underway]” at the end of the tactic description. Each tactic will need further development to determine how the tactic is to be achieved.
- Prioritization: Each tactic has been prioritized – High, Medium, Low. This prioritization does not reflect the importance of the tactic, as they are all important toward achieving the strategic goal. Rather, this prioritization reflects the tactic’s staffing / scoping priority – High priority tactics may have a substantial group assigned to it; Medium may have 4 or fewer people assigned; Low may have 1-2 people assigned.
- Metrics are ways to measure progress toward the goal, typically involving some collection of data and tracking those data elements across time. The functional owner for the related tactic is responsible for establishing and tracking the metric.

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<sup>5</sup> Initial Board member assignments listed in Appendix B.

## Goals, Tactics and Metrics

**Goal #1:** By the end of 2020, the Center is a vibrant, thriving spiritual organization energized and operated by a highly effective team that includes Board of Trustees, ministers, practitioners, staff and volunteers, striving to fulfill the mission, purpose, vision and values of the Center.  
(People)

### Proposed Tactics

#### 2017

- HR: [High] Increase focus on the Human Resources of the Center (e.g., contract an HR professional, staffing, training, compensation review, promoting diversity)
- IT: [High] Provide necessary tools, technology and training to increase productivity, communication and effectiveness for all levels of the organization (staff, volunteers, congregants) *[already underway]*
- Org Dev: [High] Develop and implement processes and methods that reinforce and reward behaviors that support and foster Center values in all levels of the organization and across all functions
- Org Dev: [High] Create and implement processes and an environment of objective assessment, accountability and acknowledgement (e.g., evaluation criteria for people and programs, constructive feedback and reviews, recognizing people's efforts)

#### 2018

- Org Dev: [High] Design and implement an effective organizational structure including roles, reporting relationships, responsibilities, staffing, job descriptions, qualifications, objective hiring criteria, and designation of paid vs. volunteer roles *[already underway]*
- Org Dev: [High] Assess, develop and train Board members, ministers, staff and volunteers, including team building, interpersonal skills, functional / job skills and Center tools and processes *[already underway]*
- Org Dev: [Med] Implement policies, plans and procedures to ensure the continued vitality and sustainability of the organization (e.g., succession plans, cross-training, contingency plans, term limits, hiring processes)

### Proposed Metrics

- Annual survey to measure overall satisfaction and morale of congregants, staff and volunteers
- Level of attrition: congregants, staff, volunteers
- Number of attendees at Sunday services, events, classes
- Average dollars per person of donations / tithes on Sunday and via fundraising
- Number of volunteers interested in serving in higher-level volunteer roles such as group / team / event leads and as Board members

**Goal #2:** By the end of 2020, the Center 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*)

### **Proposed Tactics**

#### 2017

- Education: [Med] Provide certificated and enrichment classes that are aligned with the Center vision, mission, purpose, annual themes and values [*already underway*]
- HR: [High] Contract a qualified, experienced Education Director (paid or volunteer) to oversee and direct the Education programs (both certificated and enrichment) [*already underway*]
- HR: [High] Implement a process to select and retain the best presenters / facilitators / instructors for courses (certified and enrichment), workshops and presentation events, with emphasis on instructional / speaking expertise and diverse perspectives [*already underway*]
- Marketing: [High] Explore rebranding the name “Enrichment Programs” to something more active and pointing toward personal development rather than “enrichment”

#### 2018

- Education: [High] Research and implement small group discussion and learning groups at trained congregant homes (or via virtual meetings) to discuss monthly spiritual themes or topics. Leverage the learnings from previous Center efforts and related Centers for Spiritual Living Home Office’s efforts
- Education: [Med] Expand the range and variety of topics and materials covered in courses and programs to appeal to a multi-generational, multi-cultural congregation. For example: parenting skills, wellness programs, holiday celebrations from other faiths, spirituality for teens, resources and trends in elder care, new-member-only classes, studies of text other than Science of Mind (SOM), etc. [*already underway*]
- Education: [Med] Produce regular (e.g., quarterly or semi-annual) larger-audience, one-time educational events / workshops with recognized experts as presenters / facilitators who bring in new topics and materials, along with their name recognition and personal fan-base to the benefit of the Center [*already underway*]
- Education: [Low] Explore options for remote, virtual and online education, which could include other physical locations for classes, classes held via virtual platforms, online and self-paced courses

### **Proposed Metrics**

- Course and event evaluation forms and feedback
- Number of attendees and income generated
- Number of courses / events cancelled due to low enrollment
- Diversity of offerings and facilitators

**Goal #3:** By the end of 2020, the Center 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*)

### **Proposed Tactics**

#### 2017

- Marketing: [High] Increase visibility to ways that people can engage, volunteer and participate (e.g., webpage of all groups and teams and volunteer roles, pre-service videos highlighting a group / team / role, FB posts, guest blogs or eNews that highlight a group / team / role / project) [*already underway*]
- Marketing: [Med] Populate and launch the Center YouTube channel, both for marketing and educational purposes. Investigate expansion opportunities for the New Thought Channel [*already underway*]

#### 2018

- Org Dev: [High] Expand ways that congregants can be of service to Center operations (e.g., marketing / social media internships, guest bloggers, new member buddies, data entry, painting, facilities maintenance) [*already underway*]
- Programs: [Med] Establish new ways to create internal community and engagement (e.g., local retreats, new groups, artist exhibits on Center walls, increased pastoral care) [*already underway*]

#### 2019

- Education: [Med] Expand options to educate and connect congregants and others (e.g., “visiting minister” or “visiting choir” visits to local organizations, redo bulletin and collateral to help congregants capture learning nuggets from Sunday service, after-school youth program, visibility to other organizations’ learning events)

#### 2020

- Programs: [Low] Establish new, ongoing ways to support the broader community such as ongoing Outreach projects (e.g., reading mentors, food kitchen), service travel to other locations / countries, senior peer advocate volunteer with regular office hours, services in another language / translation

### **Proposed Metrics**

- Number of active Center volunteers quarter over quarter, year over year
- Total number of all volunteer hours provided to the Center (quarter over quarter)
- Sunday in-person and livestream attendance
- Number of active groups and teams, and level of active membership in each
- Number of “engagement events” during the year, and level of attendance (e.g., classes, workshops, retreats, presentations, projects, etc.)
- Retention rate of new members after 1 year and after 2 years
- Number of new members who become volunteers within their first year of membership

**Goal #4:** By the end of 2020, the Center circulates abundance throughout our center, reflected in the thriving interdependence of our finances, our people, and our relationships. (*Abundance*)

### **Proposed Tactics**

#### 2017

- Finance: [High] Revitalize stewardship program to include an expanded team, new messaging and a shift in perspective and attitude from transactional to relational regarding the practices of giving and generosity
- Finance: [High] Plan and implement a planned giving program to promote bequests and acknowledge this group of donors
- Finance: [Med] Review and revise the cost and fee structure for Center offerings (e.g., presentations, classes, workshops, shows), including tiered fees (e.g., seniors, members, youth, scholarships, general public) and minimum attendance / enrollment thresholds. This analysis should feed into the 2018 budget process
- Finance: [Med] Begin identifying and strategically engaging major donors

#### 2018

- Finance: [High] In time for 2019 budget, implement values and/or mission based budgeting that reflects core beliefs and includes a realistic savings goal. Send Board members to the Financial Freedom workshop in 2018
- Finance: [Low] Design and launch a major gifts and/or capital campaign fundraising effort
- HR: [Med] Contract a Development Director (paid or volunteer) to oversee all types of fundraising and donations

#### 2019

- Finance: [Low] Refresh and judiciously expand fundraising events and streamline fundraising processes [*already underway*]

### **Proposed Metrics**

- Sunday in-person and livestream attendance, along with amount of donations
- Fundraiser event attendance / unique bidders and net income
- Number of staff and volunteer hours needed to put on each fundraiser
- Dollar amount of pre-scheduled (i.e., non-Sunday) donations (quarter over quarter)
- Timeliness of acknowledgements and thank-you letters for donations
- Number and attendance (% of invited donor base) at donor appreciation events
- Evaluation and feedback from donor appreciation events
- Total number of all volunteer hours provided to the Center (quarter over quarter)

**Goal #5:** By the end of 2020, the Center 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*)

### **Proposed Tactics**

#### 2017

- Facilities: [High] Ensure that a) grounds and facility are clean, free of clutter, up-to-date, and aesthetically pleasing and b) that all equipment (e.g., AV equipment and technology) is functional with documented instructions nearby, to provide an appealing space to rent and/or place to attend events [*already underway*]
- Marketing: [High] Create marketing collateral (e.g., webpage, brochures) that describes Center grounds, facility, room sizes, room rental information and fees for local non-profits, community and rites of passage events, including an easy way to submit inquiries about room / space rental

#### 2018

- Marketing: [Med] Establish an internal role (could be volunteer) who ensures that Center events are consistently publicized locally (e.g., Willow Glen newspaper, local online calendars, local social media, MeetUp, etc). In addition, measure effectiveness of the publicity and adjust to maximize results [*already underway*]

#### 2019

- Marketing: [Med] Develop ongoing relationships and communication with select local organizations that support personal and/or community transformation, to share event information, contacts and ideas. Organization liaisons could be staff [*already underway*]
- Programs: [Med] Implement a program for regular (e.g., quarterly or semi-annual) sharing of the pulpit with other faith leaders
- Programs: [Med] Host spiritually-themed events at the Center that are widely publicized to the general public, and aligned with CSL philosophy and viewpoint [*already underway*]

#### 2020

- Marketing: [Low] Participate in, and publicize, events of partner organizations to create strong community relationships, increase visibility and reach of the Center, and provide service to those organizations [*already underway*]
- Programs: [Low] Host local community-based, general public events (e.g., neighborhood safety, non-spiritual workshops and lectures) at the Center that are widely publicized to the general public, and aligned with CSL philosophy and viewpoint [*already underway*]
- Programs: [Low] Investigate Center speakers / spokespersons (e.g., ministers, practitioners, leaders) going out to other organizations to talk about Science of Mind (SOM) and related spiritual topics

### **Proposed Metrics**

- Number of times facilities are rented (non-profit, for profit, individual, community), and amount of revenue generated
- Number of events and activities to which the general public is formally invited
- Number of general public (i.e., non-members) attending these events

## Appendices

### Appendix A: Tactics by Year and Functional Area

#### 2017

- Education: [Med] Provide certificated and enrichment classes that are aligned with the Center vision, mission, purpose, annual themes and values [*already underway*] (*Education*)
- Facilities: [High] Ensure that a) grounds and facility are clean, free of clutter, up-to-date, and aesthetically pleasing and b) that all equipment (e.g., AV equipment and technology) is functional with documented instructions nearby, to provide an appealing space to rent and/or place to attend events [*already underway*] (*Hub*)
- Finance: [High] Revitalize the stewardship program including an expanded team, new messaging and a shift in attitude and perspective on the practices of giving and generosity (*Abundance*)
- Finance: [High] Plan and implement a planned giving program to promote bequests and acknowledge this group of donors (*Abundance*)
- Finance: [Med] Review and revise the cost and fee structure for Center offerings (e.g., presentations, classes, workshops, shows), including tiered fees (e.g., seniors, members, youth, scholarships, general public) and minimum attendance / enrollment thresholds. This analysis should feed into the 2018 budget process (*Abundance*)
- HR: [High] Increase focus on the Human Resources of the Center (e.g., contract an HR professional, staffing, training, compensation review, promoting diversity) (*People*)
- HR: [High] Contract a qualified, experienced Education Director (paid or volunteer) to oversee and direct the Education programs (both certificated and enrichment) (*Education*)
- HR: [High] Implement a process to select and retain the best presenters / facilitators / instructors for courses (certified and enrichment), workshops and presentation events, with emphasis on instructional / speaking expertise and diverse perspectives (*Education*)
- IT: [High] Provide necessary tools, technology and training to increase productivity, communication and effectiveness for all levels of the organization (staff, volunteers, congregants) [*already underway*] (*People*)
- Marketing: [High] Explore rebranding the name “Enrichment Programs” to something more active and pointing toward personal development rather than “enrichment” (*Education*)
- Marketing: [High] Increase visibility to ways that folks can engage, volunteer and participate (e.g., webpage of all groups and teams and volunteer roles, pre-service videos highlighting a group / team / role, FB posts, guest blogs or eNews that highlight a group / team / role / project) (*Engagement*)



- Marketing: [Med] Populate and launch the Center YouTube channel, both for marketing and educational purposes. Investigate expansion opportunities for the New Thought Channel [*already underway*] (*Engagement*)
- Marketing: [High] Create marketing collateral (e.g., webpage, brochures) that describes Center grounds, facility, room sizes, room rental information and fees for local non-profits, community and rites of passage events, including an easy way to submit inquiries about room / space rental (*Hub*)
- Org Dev: [High] Develop and implement processes and methods that reinforce and reward behaviors that support and foster Center values in all levels of the organization and across all functions (*People*)
- Org Dev: [High] Create and implement processes and an environment of objective assessment, accountability and acknowledgement (e.g., evaluation criteria for people and programs, constructive feedback and reviews, recognizing people's efforts) (*People*)

## 2018

- Education: [High] Research and implement small group discussion and learning groups at trained congregant homes (or via virtual meetings) to discuss monthly spiritual themes or topics. Leverage the learnings from previous Center efforts and related Centers for Spiritual Living Home Office's efforts (*Education*)
- Education: [Med] Expand the range and variety of topics and materials covered in courses and programs to appeal to a multi-generational, multi-cultural congregation. For example: parenting skills, wellness programs, holiday celebrations from other faiths, spirituality for teens, resources and trends in elder care, new-member-only classes, studies of text other than Science of Mind (SOM), etc. [*already underway*] (*Education*)
- Education: [Med] Produce regular (e.g., quarterly or semi-annual) larger-audience, one-time educational events / workshops with recognized experts as presenters / facilitators who bring in new topics and materials, along with their name recognition and personal fan-base to the benefit of the Center [*already underway*] (*Education*)
- Education: [Low] Explore options for remote, virtual and online education, which could include other physical locations for classes, classes held via virtual platforms, online and self-paced courses (*Education*)
- Finance: [High] In time for 2019 budget, implement values and/or mission based budgeting that reflects core beliefs, is tied to the Center mission, and includes a realistic savings goal. Send Board members to the Financial Freedom workshop (*Abundance*)
- Finance: [Low] Design and launch a major gifts and/or capital campaign fundraising effort (*Abundance*)
- HR: [Med] Contract a Development Director (paid or volunteer) to oversee all types of fundraising and donations (*Abundance*)
- Marketing: [Med] Establish an internal role (could be volunteer) who ensures that Center events are consistently publicized locally (e.g., Willow Glen newspaper, local online

calendars, local social media, MeetUp, etc). In addition, measure effectiveness of the publicity and adjust to maximize results *[already underway] (Hub)*

- Org Dev: [High] Design and implement an effective organizational structure including roles, reporting relationships, responsibilities, staffing, job descriptions, qualifications, objective hiring criteria, and designation of paid vs. volunteer roles *(People)*
- Org Dev: [High] Assess, develop and train Board members, ministers, staff and volunteers, including team building, interpersonal skills, functional / job skills and Center tools and processes *[already underway] (People)*
- Org Dev: [Med] Implement policies, plans and procedures to ensure the continued vitality and sustainability of the organization (e.g., succession plans, cross-training, contingency plans, term limits, hiring processes) *(People)*
- Org Dev: [High] Expand ways that congregants can be of service to Center operations (e.g., marketing / social media internships, guest bloggers, new member buddies, data entry, painting, facilities maintenance) *(Engagement)*
- Programs: [Med] Establish new ways to create internal community and engagement (e.g., local retreats, new groups, artist exhibits on Center walls, increased pastoral care) *[already underway] (Engagement)*

## 2019

- Education: [Med] Expand options to educate and connect congregants and others (e.g., “visiting minister” or “visiting choir” visits to local organizations, redo bulletin and collateral to help congregants capture learning nuggets from Sunday service, after-school youth program, visibility to other organizations’ learning events) *(Engagement)*
- Finance: [Low] Refresh and judiciously expand fundraising events and streamline fundraising processes *[already underway] (Abundance)*
- Marketing: [Med] Develop ongoing relationships and communication with select local organizations that support personal and/or community transformation, to share event information, contacts and ideas. Organization liaisons could be staff *[already underway] (Hub)*
- Programs: [Med] Implement a program for regular (e.g., quarterly or semi-annual) sharing of the pulpit with other faith leaders *(Hub)*
- Programs: [Med] Host spiritually-themed events at the Center that are widely publicized to the general public, and aligned with CSL philosophy and viewpoint *[already underway] (Hub)*

## 2020

- Marketing: [Low] Participate in, and publicize, events of partner organizations to create strong community relationships, increase visibility and reach of the Center, and provide service to those organizations *[already underway] (Hub)*
- Programs: [Low] Establish new, ongoing ways to support the broader community such as ongoing Outreach projects (e.g., reading mentors, food kitchen), service travel to

other locations / countries, senior peer advocate volunteer with regular office hours, services in another language / translation (*Engagement*)

- Programs: [Low] Host local community-based, general public events (e.g., neighborhood safety, non-spiritual workshops and lectures) at the Center that are widely publicized to the general public, and aligned with CSL philosophy and viewpoint (*Hub*)
- Programs: [Low] Investigate potential for Center speakers / spokespersons (e.g., ministers, leaders, pracs) going out to other organizations to talk about Science of Mind (SOM) and related spiritual topics (*Hub*)

## **Appendix B: Board Member Assignments to Goals**

Below are the initial assignments of current Board members to be the Board liaison / champion / monitor of each goal's progress. The Board members will work with the functional leads to help plan and oversee the various tactics supporting the goal.

It is anticipated that these assignments will shift over time. Future Board member recruitment and nomination efforts will include attention to interest and skill in these areas, such that a retiring Board member can make a hand-off to an existing or new Board member as a goal-owner, with the intent that all Strategic Planning goals are covered by the Board as a whole.

Goal #1: People – Susanne Mulcahy, Mitsie Smith

Goal #2: Education – Dr. David Bruner

Goal #3: Engagement – Sandy Sherrill

Goal #4: Abundance – David Field, Ann Marshall

Goal #5: Hub – Les Lindop

## Appendix C: Strategic Planning Teams

### Strategic Planning Research Team

- Marcia Bencala
- Cici Bower\*
- Tom Bower\*
- David Bruner
- Jackie Corvelle\*
- Dave DiLullo
- Sharon Doherty\*
- Jill Eisenhart
- Liz Fedyna
- Jacque Hansen\*
- Andy Jackson\*
- Ilia Jackson\*
- Liza Jensen\*
- Pat Lasserre^
- Nancy Le
- Mat Lindstedt\*
- Mauricio Lopez
- Patrick Lynch\*
- Sarah Mozelle^
- Susanne Mulcahy+
- Susan Neva
- Tracy Rogers\*
- Barbara Valdez\*
- Ron Wade\*
- Raquel Watjen
- Eric Watjen

\*: was a team member for a portion of Phase 1 (either concluded early or joined late)

+: was the Board liaison

^: was a “consultant” to the team in a specific area of expertise

### Strategic Plan Development Team

Board members:

- Dr. David Bruner
- David Field
- Les Lindop
- Ann Marshall
- Susanne Mulcahy (Chair)
- Sandy Sherrill
- Mitsie Smith

Board Emeriti:

- Marcia Bencala
- Liz Fedyna
- Ron Wade

Both teams were led and facilitated by Dorcas Kelley

## **Appendix D: Strategic Planning Research Sources**

### **Churches / Venues Investigated**

- Albuquerque CSL
- Cathedral of Faith
- Center for Spiritual Enlightenment
- Center for Spiritual Living Peninsula
- Crossroads Community Church
- Jubilee Christian Center
- South Bay Church
- Spiritual Living Center of Atlanta
- Unitarian Universalist Los Gatos
- Unity Palo Alto
- Unity San José
- Venture Church Los Gatos
- Vive Church (formerly C3 Silicon Valley)

### **Community Organizations Interviewed**

- African American Community Service Agency – Shirley (Receptionist)
- Billy DeFrank LGBTQ Community Center – Gabrielle Antolovich, Board President
- Campbell Unified School District – Dr. Eric Andrews, Superintendent
- Center for Spiritual Living, San José – Jamie Campos, Rev. Susan Overland
- Children’s Discovery Museum of San José – Autumn Young, Marketing Manager
- Grail Family Services – Veronica Goei, Executive Director
- Project Cornerstone – Anne Ehresman, Executive Director
- Sacred Heart Community Services – Rachel Wright, Director of Research
- San José Community College – Roland Montemayor, VP of Student Services
- San José Downtown Association – Scott Kines, Director
- San José Peace and Justice Center – Michelle Cordova, Executive Director
- San José Senior Citizens Commission – Warren Gannon (Chair), Tracey Gott (Recreation Supervisor, Senior Services) and Robert Winsor (Commission Member)
- San José Silicon Valley Chamber of Commerce – Matthew Mahood, President and CEO
- Santa Clara County Office of Education – Joseph DiSalvo, Board Member
- Santa Clara County Office of Veterans Services – Marion Moses, Director
- Second Harvest Food Bank - Bernadette White, Community Relations Coordinator, and Amy Kaiser, Director of Programs
- Silicon Valley Interreligious Council (SiVIC) – Rev. Dr. D. Andrew Kille, Chair
- Thriving Neighborhoods Initiative, Greater Washington Community, Ignatian Center, Santa Clara University – Irene Cermeño, Program Director
- Willow Glen Business Association – Scarlet Myers, Executive Director

If you have questions, concerns or feedback about this Strategic Plan,  
please contact:

Susanne Mulcahy, Chair, Board of Trustees, [susannemulcahy@cslsj.org](mailto:susannemulcahy@cslsj.org)