



Sky Creek Dharma Center

Strategic Planning Retreat Agenda

Saturday October 6 2007

9 am – 4 pm

Introductions:

- Please briefly share why you are here and what would make this day feel successful to you.
- Overview of Agenda and Planning Committees Desired Outcomes (Jessica)

Establishing the Context:

- A review of the history of the Dharma Center (timeline activity) (Jasper and Amos, all)
- Our accomplishments so far (timeline activity) (Jasper and Amos, all)
- Our current statement of purpose (Amos)
- Discussion (brief) of Articles of Incorporation and Bylaws (Amos)
- Discussion (brief) of current status of incorporation (Amos)
- Overview of management practices to date (Amos)
- Our past and current financial Status (Jessica)

Five Minute Workshop #1: What is a Strategic Plan? (Tracy)

Planning Activity I: Articulate our mission for the Dharma Center (Tracy)

Planning Activity II: SWOT Analysis (Strength, Weaknesses, Opportunities, Threats) (Tracy)

Planning Activity II: Identify Strategic Initiatives (**30 minutes**)

Five Minute Workshop # 2: What is a Capital Campaign? (Amos)

Planning Activity III: Work group for each Strategic Initiative. (Tracy and Amos Support)

Five Minute Workshop #3: Goals, Objectives, Activities: The elements of a plan (Tracy)

Form workgroups for highest priority strategic initiatives. Workgroups outline plans and present to the whole group for comments

Planning Activity IV: Organize the Board of Directors

Five Minute Workshop #4: What are the responsibilities of a Board of Directors? (Tracy)

Planning Activity V: Identify Next Steps (Amos)

Plan for completing a strategic plan

Next Meeting Date

Closure Comments (Tracy facilitates) (30 minutes)

Mission Statement Activity

1. What do you see as the current purpose of our center? Consider its purpose in relationship to you personally, to the sanghas(s) you meet with, to the Buddhist community in general, and to the wider community of Chico and the North State as a whole.

2. How does the Center benefit you personally? Your sangha? Our community? The region? What value do we add to each of the above?

3. SWOT analysis (Strengths-Weaknesses-Opportunities-Threats)

S:	What are our strengths as a center (all levels-individuals to sangha at large)?
W:	What are our weaknesses ?
O:	What opportunities exist that may help us realize our mission? Try to get creative-maybe there are opportunities we have yet to see.
T:	What are the threats to our continued existence (an example might be one of the groups pulls out and the remaining groups have to carry the financial burden)? Again, try to be really complete. The more aware we are of possible threats to our existence, the better we can deal with them.

Visioning Activity

Part I: Imagine the best-case scenario for each of the questions below, based on ideas that are most appealing to you personally. Write brief descriptive responses.

1. In five years, a new person visits the dharma center for the first time. What do they *see* and *hear*? How will they describe the center to others?
2. In five years, there is a feature story about the Dharma Center in a local news publication. What are its main points?
3. Five years from now you explain to someone how you personally have benefited from your participation in the Dharma Center. How do you describe these benefits?
4. Five years from now you are reflecting on what contributions you have made to the Dharma Center. What have those contributions been?
5. Imagine we are finishing our fifth year of operation. In the past year (2012) where have our funds have come from, and how they have been used?

Part II: Share your responses with two or three other people. As a group, develop a synthesis of your vision for the future.

Part III: As a group, consider what types of activities will be needed *starting now* to achieve your vision for 2012. List these activities.

Part IV: Review your list of activities. Combine them into groups which are logically related and can be thought of as major strategies upon which to base our plan.

Share Parts II, III, and IV with the whole group. Listen carefully to what the other small groups share.