

# Creating/Clarifying a Shared Vision of the Future for SCZC

## SCZC Board/Leaders Retreat

### February 9, 2013

9:30 to 3:00, Zendo

**Present:** Edie Brown, President, Chuck Overley, Vice President, Michael Bashista, Treasurer, Liz Milazzo, Secretary; at large: Sally Aguirre, Brian Corser, Chris Davidson, Rob Hoogner (present for morning only), Jeff Sherman. Non-voting: Nannette Overley.

**Absent:** Lisa Noble, member at large, leave of absence.

**3 Leaders in Attendance:** Kokyo, Patrick, and Gene

### Agenda

#### Goals for Retreat:

- Create/clarify a shared vision for the future of SCZC
- Gap analysis: current reality vs. vision
- Strategic Planning: alignment with mission/vision/values
  - Develop program goals, objectives, and measureable outcomes

#### 9:30am to 12:30pm

- Welcome and warm-up exercise
- Review board responsibilities
- Why is visioning important?
- Visioning Process
- Vision statements - examples
- Visioning exercise

#### 12:30 – 1pm Lunch

#### 1pm – 3pm

- Visioning exercise (continued)
- Gap analysis: current reality vs. vision
- Strategic Planning
  - Aim statements and SMART goals
  - Measureable outcomes and program evaluation

### Retreat Notes

Intention: shared vision for Zen Center.

Edie asked for group to start with Appreciative Inquiry and share some “Positives” to begin: We’ve accomplished a lot already. Much of what we’ve discussed in the last couple of years has come into being.

Shared understandings to begin the retreat work:

- Co-creators for today.
- Not here to change mission, but look at what it says now.
- Balance of inquiry and advocacy.
- Make mental models explicit – meeting participant will capture assumptions.
- Inquire and reflect on assumptions. E.g. say more about your view, what might change your view, and what is difficult about the situation?