



**Sacred Planning**  
Align with The Divine

### **Divine Invitation for Direction**

Divine Creator of the Universe, we thank you for the loving care that surrounds us on all sides and has brought us to where we are now. Today we invite your Spirit of Knowledge and Truth to be fully present with us in this Sacred Planning Circle of listeners who seek your wisdom and direction.

We ask with confidence that you open our hearts and minds to a greater understanding of who we are and a glimpse of your vision of who we might become. Through this Sacred Planning Circle, guide and direct each of us present in the pursuit of harmony within ourselves, with others, with all creation, and most especially with a Divine design for the next five years of our life here on earth.

Help us know all is well. As we work independently and together in this Sacred Circle, allow your Divine Spirit to inspire all of us to reflect your special love for each of us. So be it.

# Sacred Planning Circle Weekend Course

## Session Timeline

### Friday Evening Schedule

5:30 PM	Food and Fellowship
6:00	Course Orientation
6:15	Precious Objects
6:30	Personal Core Values
7:30	Personal Mission Statement
8:30	Personal Strategic Agenda
9:30 PM	Wrap up and Close

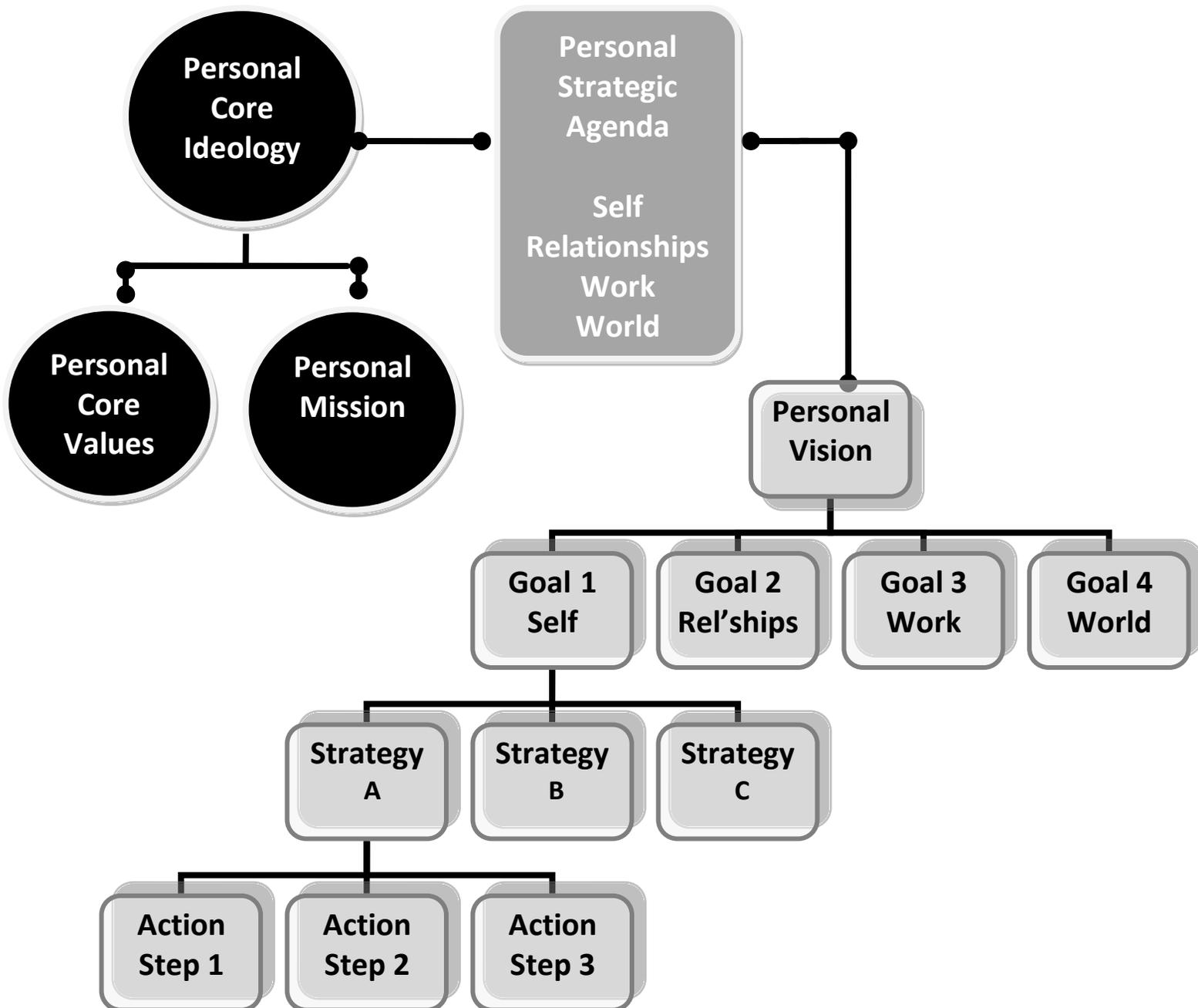
### Saturday Schedule

9:00 AM	Personal Vision
10:00	Personal Goals and Strategies
11:30	Personal Action Steps
1:00 PM	Wrap up and Close

# Your Sacred Plan Will Answer 7 Key Questions about You, Your Life and Your Future

- |  |                               |
|--|-------------------------------|
| 1. <i>Who am I?</i>  | <b>Your Core Values</b>       |
| 2. <i>Why am I here? What makes me come alive?</i>                     | <b>Your Mission</b>           |
| 3. <i>What are the main things?</i>                                    | <b>Your Strategic Agenda</b>  |
| 4. <i>Who, what, and where do I want to be in three to five years?</i> | <b>Your Vision of Success</b> |
| 5. <i>What must I accomplish to get there?</i>                         | <b>Your Goals</b>             |
| 6. <i>How will I get there?</i>  | <b>Your Strategies</b>        |
| 7. <i>What specific things will I do this year and by when?</i>        | <b>Your Action Steps</b>      |

# Strategic Planning Framework



# Step 1: Discern Your Core Values – *Who Am I?*

## Prayer for Guidance in Discernment of Core Values

Divine Creator of the Universe, take our hand as we journey inward to the center of our beings, searching for knowledge of who we are when we are at our best.

Along the way, help us see ourselves as you do, and show us what ideals are most essential to the person you created us to be. Help us see which ones nurture our growth and make us feel healthy and whole. Reveal to us which ones are so central that without them we would not be the unique people we are or want to be. Show us clearly the very few ideals we place before all others.

Help us know all is well. As we work independently and together in this Sacred Circle, allow your Divine Spirit to inspire all of us to reflect your special love for each of us. So be it.

**Purpose of this exercise:** To identify what ideals define you when you are at your best.

### Your Personal Core Values will ...

Anchor you in what you stand for and hold dear above all else. Your core values shape your identity.

### Strategic question to discern what makes you YOU...

*“Who am I?”*

### Your tasks today

1. Think about the most important ideals that shape your life. These will be at the heart and soul of the matter when you make choices and decisions about yourself, your relationships, your work, and the world. Here are some examples of core values:

- Trust
- Faith
- Authenticity
- Reliability
- Loyalty
- Generosity
- Faith
- Love
- Community
- Wisdom
- Service
- Compassion
- Kindness
- Honesty
- Security
- Achievement
- Equity
- Justice
- Balance
- Humor
- Perseverance
- Family
- Responsibility
- Spirituality
- Stability
- Truth
- Vision
- Adaptability
- Creativity
- Peace
- Joy
- Integrity
- Hope
- Passion
- Courage
- Respect

2. List up to five values that define what matters most to you (they do not have to be from this list).

## Step 2: Writing a Personal Mission Statement – *Why Am I Here?*

### Prayer for Guidance in Discernment of Mission

Divine Creator of the Universe, thank you for leading us to a deeper understanding of who we are. As you guide this Sacred Planning Circle in our next step, speak to us about the purpose for which we were created. Help each of us answer the question 'why am I here on earth?'

We ask with confidence that you reveal the unique work in this life that is only ours to do. Show us what would be missing in the Universe if we had not been born.

And as you lead us to these sacred truths, help us write powerful purpose statements that simply express the reason we exist. Words we can remember and repeat that will compel us to get up each day, inspire us to engage in your Universe, and empower us to make whatever difference is uniquely ours to make.

Help us know all is well. As we work independently and together in this Sacred Circle, allow your Divine Spirit to inspire all of us to reflect your special love for each of us. So be it.

**Purpose of this exercise:** To draft a personal mission statement.

### Your personal Mission Statement will ...

Anchor you in the essential reason for your existence, prevent you from engaging in activities and pursuits that are off-mission, and help you focus your decision-making. Your personal Mission Statement defines your purpose.

### Strategic questions to find your purpose ...

*“Why am I here? What makes me come alive? What moves me?”*

### Your tasks today

1. Think about your values, what you are passionate about, and what makes you who you are. For example: My purpose is to use my passion and expertise in technology to inspire researchers to create drugs to cure rare diseases.
2. Draft your personal mission statement using the template below:

*Believing* (your core values and/or expertise)... +

*I am here to* (your primary purpose or the value you create and for whom)... +

*So that* (impact you want for your life or the expected outcome) ...

"The two most important days in your life are the day you are born and the day you find out why." Mark Twain

3. Apply the following tests for mission to your draft mission statement:

- Does it flow from your core values?
- Does it answer the question 'why do I exist?'
- Is it understandable?
- Is it clear?
- Is it memorable?
- Is it enduring?
- Is it compelling?

4. Write your revised draft here.

5. When you are satisfied with your draft, write it onto the easel pad provided and post for group discussion.

**Here are some samples of Personal Mission Statements:**

- To be a teacher. And to be known for inspiring my students to be more than they thought they could be. - *Oprah Winfrey, founder of OWN, the Oprah Winfrey Network*
- To use my gifts of intelligence, charisma, and serial optimism to cultivate the self-worth and net-worth of women around the world. - *Amanda Steinberg, founder of DailyWorth.com*
- To be a great healer of mankind.
- To be a super entrepreneur and bring wealth and value to those I serve.
- To be a hero and a defender to those who do not have the means to defend themselves.
- To give myself to those with very little and show them how to create abundance for themselves.
- To bring my music to the masses.
- To bring love and laughter to all those who come into my presence.
- To be a great competitive athlete who makes the competition have to evolve.
- To give unconditional compassion and warmth to people who are in need.
- To create the best and most healthy mouthwatering dishes that tantalize the taste-buds of millions.
- To create artworks and masterpieces that captivate and intrigue audiences.
- To bring quality programming to Television that educates people and expands their horizons.
- To be a wise and inspiring teacher to the young future leaders of the world.
- To be a thrilling writer who is a companion to many.

### Step 3: Create Your Strategic Agenda – *What Are the Main Things?*

**Prayer for Guidance in Discernment of Strategic Agenda**

Divine Creator of the Universe, thank you for showing us more about what we stand for and our purpose in life. Now we ask you to show us what opportunities we have to live our best lives and what holds us back from achieving our purpose.

Lead us into all truth about the gifts and talents we have been uniquely given and our most critical areas of challenge. Help us separate and prioritize the challenges and opportunities we should pursue from those that should not distract us, worry us, or make us fearful.

Help us know all is well. As we work independently and together in this Sacred Circle, allow your Divine Spirit to inspire all of us to reflect your special love for each of us. So be it.

**Purpose of this exercise:**

To identify the most important strategic forces that will impact your life in the next three to five years.

**Your Strategic Agenda will ...**

Prioritize areas in Yourself, Relationships, Work, and the World that are uniquely offered to you as your best opportunities to develop and grow.

**Strategic question to create your strategic agenda...**

*“Given who I am, why I exist, and challenges and opportunities within myself, my relationships, my work, and the world, what are the main things for me to prioritize to achieve maximum progress in my life in the next three to five years?”*

Self	Relationships
Educational achievement	Community relationships
Financial management	Challenges to family stability
Health and wellness	Family issues
Hobbies	Family lifecycle events and transitions
Finding happiness in life	Friends and social networks
Finding meaning in life	Love relationships
Personal lifecycle events and passages	Partnerships
Managing transitions	Professional relationships
Personal growth	Separation from family or friends
Rest and relaxation	
Spiritual growth and development	
Work	World (local, national, global)
Career or vocation challenges	Adding value to the world in everyday living
Career or vocation opportunities	Economic issues and opportunities
Career transitions	Education issues and opportunities
Financial security	Equity and social justice issues
Financial stability	Environmental issues and opportunities
Financial sustainability	Health issues and opportunities
Job satisfaction	Political issues and opportunities
Professional fulfillment	Poverty issues and opportunities
Professional growth and development	Technology issues and opportunities
Work/life balance	

**Your tasks today**

1. Working from the list of typical challenges and opportunities above – or from your own list – set your personal strategic agenda by choosing up to three challenges or opportunities in each of the four personal growth areas of Self, Relationships, Work, and World that you want to PRIORITIZE.
2. Write your choices in the column labeled ‘Challenge or Opportunity.’
3. Ask yourself what is true for you now in that area, and what you want to be true three to five years from now. Write your answers in a few words in the columns labeled ‘Now’ and ‘3-5 Years from Now’ in the chart below labeled *My Personal Strategic Agenda*. A sample is provided to help you get started.

**Sample Strategic Agenda**

Domain	Challenge or Opportunity	Now	3-5 Years from Now
<b>Self</b>	Spiritual growth and development	Growing faith and trust	Total faith and trust
	Health and wellness	Moderate self-care	Balanced
	Financial management	Diminishing	Restored
<b>Relationships</b>	Family issues	Estranged	Reconciled
	Love relationships	Still somewhat co-dependent	Co-dependent no more!
	Mom’s life-cycle events	Lack of attention	More focus and time spent
<b>Work</b>	Transitioning	Winding down corporate planning practice	Thriving coaching and sacred personal planning practice
	Professional development	None	Certified coach
	Career fulfillment	Sacred planning book is only an idea	Book tour!
<b>World</b>	Adding value to the world in everyday living	Impatient and sometimes unkind	Light bearer all the time!
	Finding a new humanitarian cause	Not involved	Involved and contributing

**My Personal Strategic Agenda**

Domain	Challenge or Opportunity	Now	3-5 Years from Now
<b>Self</b>			
<b>Relationships</b>			
<b>Work</b>			
<b>World</b>			

## Step 4: Envision Success – *Who, What and Where Do I Want to Be?*

### Prayer for Guidance in Discernment of Vision

Divine Creator of the Universe, you have helped us see who we are and the unique purpose to which we have been called. We thank you for these revelations. You have inspired us with possibilities and brought before us issues that will challenge us to stretch and grow.

Now we ask you to walk us toward a vision of what you have in mind for our futures given who we are, why we are here, and our best growth priorities. We are confident that you will share with us your vision of how all things might work together for our good. Paint a picture in our minds of who and what we can become.

As you lead us to this place, help us write a clear statement that captures this inspiring vision. Stretch us out of our comfort zones. Help us be bold and courageous. Give us a glimpse of your Divine dream for our best future.

Help us know all is well. As we work independently and together in this Sacred Circle, allow your Divine Spirit to inspire all of us to reflect your special love for each of us. So be it.

**Purpose of this exercise:** To write an inspiring vision statement that will create a compelling picture of your future success.

#### *Sample Personal Vision Statements:*

1. By 2021, I will have followed my calling to Europe and my soul will be satisfied.
2. In 2021, my family and I will be thriving and prosperous, anchored in personal strength, stability, and vibrant relationships.
3. By 2021, I will be a joyful light worker surrounded by family in a committed relationship with a like-minded partner.
4. In 2021, I will be living, thriving, and inspiring others in a stimulating community of creative opportunity.
5. By 2021 I will have earned my degree, have a financially rewarding job in the IT industry, and an emotionally satisfying relationships with family.
6. In 2021 I will be an honest, empathetic and impactful project leader recognized internationally within my industry.
7. In 2021 I will have created and led a dream team where everyone is playing to their strengths.
8. In 2021, I will be nationally known champion of justice and diversity.
9. At the next Olympics, I have made my country proud as I am being awarded the gold in gymnastics.
10. I am at the NASA institute researching in the field I love and respected by my parents, who I take care of independently and are happily settled in my hometown.

**Your Personal Vision Statement will...**

Describe who, what, and where you wish to be in 2021 and inspire you to work toward getting there every day.

**Strategic question to create your vision of future success...**

*“Who, what, and where do I want to be in 2021?”*

**Your task today**

1. Based on your responses in the ‘3-5 Years from Now’ column of your personal Strategic Agenda on page 4, build a word bank of up to 24 powerful descriptors of who, what, and/or where you want to be in 2021 that is a stretch from where you are today.

**My Vision Word Bank**

1	13
2	14
3	15
4	16
5	17
6	18
7	19
8	20
9	21
10	22
11	23
12	24

- Using your Vision Word Bank, draft a vision statement in the box below that creates a vivid word picture describing your who, what, and/or where you want to be in three to five years that you are not today.

*First draft*

In 2021...

- Apply the following tests of an exemplary vision statement and revise as necessary.

- Is it aligned with your personal core values and mission?
- Does it address your personal strategic agenda?
- Is it a stretch from where you are today?
- Is it compelling?
- Is it easy to understand?
- Is it memorable?
- Does it give you goosebumps?

*Final draft*

In 2021,

*“The soul never thinks without a picture.” Aristotle*

*Facilitator note: Avoid compromising on your vision! We are often tempted to settle on compromise vision that keeps us comfortable and doesn't challenge us enough. Ask yourself, is this what I want from the process? Don't be afraid to be bold and courageous. A mushy vision doesn't excite and inspire. If your vision excites and inspires, it will give you goose bumps and stands a good chance of motivating yourself and others to action. Does your vision pass the goose bumps test?*

# Exemplary Organizational Mission and Vision Statements

## Oxfam

**Mission:** Our purpose is to help create lasting solutions to the injustice of poverty.

**Vision:** A just world without poverty (5 words)

## Habitat for Humanity

**Mission:** Seeking to put God's love into action, Habitat for Humanity brings people together to build homes, communities and hope.

**Vision:** A world where everyone has a decent place to live. (10)

## Make-A-Wish

**Mission:** Make-A-Wish serves a unique, and vital, role in helping strengthen and empower children battling life-threatening medical conditions.

**Vision:** Our vision is that people everywhere will share the power of a wish (13)

## NPR

**Mission:** The mission of NPR is to work in partnership with Member Stations to create a more informed public — one challenged and invigorated by a deeper understanding and appreciation of events, ideas and cultures.

**Vision:** NPR, with its network of independent member stations, is America's pre-eminent news institution (12)

## Teach for America

**Mission:** Our mission is to enlist, develop, and mobilize as many as possible of our nation's most promising future leaders to grow and strengthen the movement for educational equity and excellence.

**Vision:** One day, all children in this nation will have the opportunity to attain an excellent education. (16)

## ASPCA

**Mission:** To provide effective means for the prevention of cruelty to animals throughout the United States.

**Vision:** That the United States is a humane community in which all animals are treated with respect and kindness. (18)

## Goodwill

**Mission:** Goodwill® works to enhance the dignity and quality of life of individuals and families by strengthening communities, eliminating barriers to opportunity, and helping people in need reach their full potential through learning and the power of work.

**Vision:** Every person has the opportunity to achieve his/her fullest potential and participate in and contribute to all aspects of life. (21)

## Special Olympics

**Vision:** To transform communities by inspiring people throughout the world to open their minds, accept and include people with intellectual disabilities and thereby anyone who is perceived as different. (28)

**Mission:** The mission of Special Olympics is to provide year-round sports training and athletic competition in a variety of Olympic-type sports for children and adults with intellectual disabilities.

## Creative Commons

**Mission:** Creative Commons develops, supports, and stewards legal and technical infrastructure that maximizes digital creativity, sharing, and innovation.

**Vision:** Our vision is nothing less than realizing the full potential of the Internet — universal access to research and education, full participation in culture — to drive a new era of development, growth, and productivity. (33)

## Step 5: Set Your Goals and Strategies – *What Will I Have Accomplished by 2021 and How?*

### Prayer for Guidance in Discernment of Goals and Strategies

Divine Creator of the Universe, you have given us inspiring visions of where we might be in five years. Now we ask you to lead us to the specific goals and strategies that are necessary to make these visions a reality. We are ready. We are committed. Show us the accomplishments we need to focus on and how we should go about achieving them.

Help us know all is well. As we work independently and together in this Sacred Circle, allow your Divine Spirit to inspire all of us to reflect your special love for each of us. So be it all.

**Purpose of this exercise:** To identify the goals that must be accomplished to reach your vision.

The next step in the planning process is to identify goals. Goals answer the question:

*"By 2021, what will I have accomplished in the areas of Self, Relationships, Work, and the World?"*

### **Sample Goals**

By 2021, I will have fostered personal strengths and achieved healthy balance in my life.

By 2021, I will have a fulfilling and financially rewarding career.

By 2021, I will have cultivated healthy relationships and managed family transitions.

By 2021, I will be inspiring others to be their authentic selves.

### **Your task today**

1. Reflecting back on your Personal Strategic Agenda, write a goal statement for each of the four agenda areas.

- |  |
|--|
| <ol style="list-style-type: none"><li>1. In 2021 who, what, or where will you be in your <b>Self</b> that is bold and different from who, what, or where you are today?<br/>By 2021, _____<br/>_____</li><li>2. In 2021 who, what, or where will you be in your <b>Relationships</b> that is bold and different from who, what, or where you are today?<br/>By 2021, _____<br/>_____</li><li>3. In 2021 who, what, or where will you be in your <b>Work</b> that is bold and different from who, what, or where you are today?<br/>By 2021, _____<br/>_____</li><li>4. In 2021 who, what, or where will you be in the <b>World</b> that is bold and different from who, what, or where you are today?<br/>By 2021, _____<br/>_____</li></ol> |
|--|

## Step 6: Choose Your Strategies – *How Will I Reach My Goals?*

Goals can't be reached without a road map to get there. So the next step in the planning process is to create your road map. Strategies answer the question:

*"How will I reach my goals?"*

Strategies are broad approaches rather than specific tasks. In other words, they are the main highways you will take to reach your goal, not the side streets. Strategies focus "how" not "what."

### Sample Strategies

**Goal: By 2020, I will have sought and found adventure and joy in the next phase of my life.**

- A. Embrace health and lifestyle changes that add youth and vitality.
- B. Transition from corporate to personal strategic planning consulting.
- C. Develop a sustainable revenue stream as a personal coach.

### Your task today

1. List in the box below your three best strategies for each of your personal goals.

<p><b>1. The three best MAJOR approaches to achieve my 2021 goal for <i>Self</i> are...</b></p> <p>A. _____</p> <p>B. _____</p> <p>C. _____</p> <p><b>2. The three best MAJOR approaches to achieve my 2021 goal for <i>Relationships</i> are...</b></p> <p>A. _____</p> <p>B. _____</p> <p>C. _____</p> <p><b>3. The three best MAJOR approaches to take to achieve my 2021 goal for <i>Work</i> are...</b></p> <p>A. _____</p> <p>B. _____</p> <p>C. _____</p> <p><b>4. The three best MAJOR approaches to take to achieve my 2021 goal for the <i>World</i> are...</b></p> <p>A. _____</p> <p>B. _____</p> <p>C. _____</p>
---

## The Language of Strategy and Action Steps

*The following is a list of sample action verbs useful in crafting strategy.*

- Lead
- Engage
- Find
- Read and reflect
- Add
- Be
- Become
- Assess
- Take
- Activate
- Offer
- Improve
- Implement
- Develop
- Establish
- Experience
- Perform
- Help
- Diversify
- Expand
- Maintain
- Research
- Coordinate
- Innovate
- Partner
- Analyze
- Acquire
- Invent
- Increase
- Transform
- Merge
- Align
- Decrease
- Invest
- Divest
- Diversify
- Find alternative
- Disrupt
- Expand
- Target
- Maintain
- Position
- Specialize
- Compete
- Complete
- Stop
- Serve
- Enrich
- Train
- Mentor
- Build capacity
- Excel
- Learn
- Evaluate
- Educate
- Promote
- Integrate
- Optimize
- Persuade
- Maximize
- Synchronize
- Share
- Apply
- Manage
- Include
- Expand
- Relocate
- Grow
- Build
- Improve
- Reconfigure
- Reorient
- Revitalize
- Transform
- Restructure

## Step 7: Activate Your Plan – What Are Action Steps I Will Take Year?

### Prayer for Guidance in Writing Action Steps

Divine Creator of the Universe, you have shown us what we need to accomplish to make our vision a reality. You have given us a road map of the major highways that will take us there.

Now we need more specific guidance. Help us see the exact routes that will move us closer to our destination in the next year. This is essential guidance if we are going to be successful. We are confident you will light our path with very specific and clear directions as we get on the road toward the personal and sacred vision of who, what, and where you would have us be five years from now.

Help us know all is well. As we work independently and together in this Sacred Circle, allow your Divine Spirit to inspire all of us to reflect your special love for each of us. So be it.

The next step in our process is to identify specific action steps that will get your plan off the shelf and into action.

*Action steps are specific, measurable, achievable, and time-limited activities that put you on a sure path toward achieving your goals.*

**The purpose of this exercise:** To develop a list of concrete action steps that “put teeth” into your plan.

### Your Action Steps will...

Define the things you will do over the next year to successfully launch your five year plan.

### Strategic question to create a set of one year action steps to launch your plan...

*“What will I do by when?”*

### Your task today

1. Go to your personal strategies for Goal 1 (Self) on page 10 and transfer them to page 21 in the column marked ‘Strategy.’
2. Work through each of your strategies and write the three most significant specific actions you can to make each strategy come alive. Think carefully about and record the date you can complete each one. Use the first of any given month and year as target deadlines for ease of tracking (8/1/16, 9/1/16, etc.).
3. Use the list of strategy and action step verbs on page 19 as a resource for writing action steps and complete the action plan for Goal 1 using the template on the following page.
4. Repeat steps 1, 2, and 3 above for each of the remaining three goals on the pages that follow.

### **Sample Strategy and Related Action Steps:**

Strategy	Three things I will do this year	By when
Transition from corporate to personal sacred strategic planning consulting	[ X ] Establish sacredplanning.com	2/1/16
	[ ] Conduct 12 Sacred Circles	12/1/16
	[ ] Complete first draft of book	1/1/17

**Goal 1 (Self: This is what will be new, better, and/or different about me in 2021.)**

[Insert here from page 9] \_\_\_\_\_

Strategy [list below from page 10]	Three things I will do this year	By when

**Goal 2 (Relationships: This is what will be new, better, and/or different about my relationships in 2021.)**

[Insert here] \_\_\_\_\_

---

Strategy [list below]	Three things to do this year	By when

**Goal 3 (Work – This is what will be new, better, and/or different about my work in 2021.)**

[Insert here]\_\_\_\_\_

\_\_\_\_\_

Strategy [list below]	Three things to do this year	By when

**Goal 4 (World – This is what will be new, better, and/or different about my impact on the world in 2021.)**

[Insert here] \_\_\_\_\_

---

Strategy [list below]	Three things to do this year	By when