



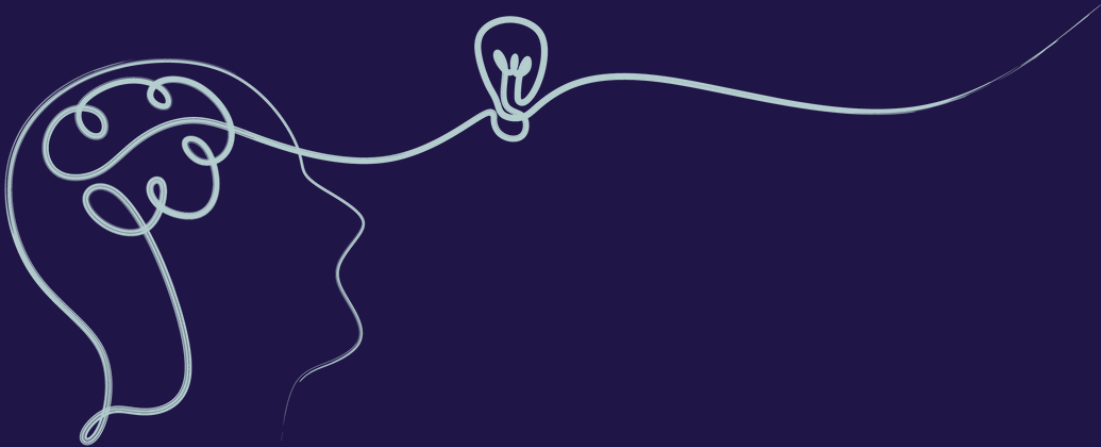
# STRATEGIC PLAN



#livelifemindfully

# what is mindfulness?

Mindfulness is paying attention on purpose in the present moment with kindness and curiosity. We have always been told to “pay attention”, but what does this mean and how does it serve us? Mindfulness helps us reconnect with the inner capacities we need to feel grounded, resourced, and capable of leading lives of kindness and compassion towards ourselves and others.



# INTRODUCTION

Calmer Choice is undergoing a period of rich evolution and transformation as it emerges from the confines of a global pandemic into a new community environment. Both internally and externally, grounds are shifting and new opportunities for growth and connection are emerging. For Calmer Choice, this provides an extraordinary opportunity to survey our inner organizational landscape alongside the needs of our community to reidentify the core of who we are, why we exist and how we serve as an organization.

Three years ago, Calmer Choice adopted a Strategic Plan designed to move the organization from adolescence (grassroots startup) to maturity (sustainable nonprofit). It was heavily focused on operational goals – efficiency, policies and procedures, financial systems, and programming. We were fortunate to have this roadmap in place when the pandemic hit, as it allowed us to adjust and adapt quickly and (almost) seamlessly.

Simultaneously, our CEO and Founder announced her retirement. This led to a variety of leadership changes and allowed us to reorganize in a fashion that positions us for future growth. Having successfully navigated both the depths of the pandemic and a seismic leadership change, Calmer Choice is poised to launch into its next Strategic Plan. With the operational house well on its way, this plan is truly transformational.

Grounded in the belief that we're all part of a larger ecosystem, this plan is focused on a rededication to helping kids and those who support them. We understand and appreciate the need for Calmer Choice – now more than ever – and this plan will serve as the framework for delivering our programming in new and exciting ways. It also continues our drive toward financial sustainability. Last but by no means least, this plan will help define our culture of wellbeing, compassion, and making a difference in the lives of those we serve.

This is a plan like no other. It's got a heart and a soul. It will breathe and grow along the way. It will make Calmer Choice a model organization.

*...and we're excited to get started!*



# PROCESS

The Board of Directors and Calmer Choice Staff participated in day-long retreats and working sessions.

1/12

Calmer Choice  
Staff Retreat  
facilitated by  
Adam Brock from  
Regenerate  
Change

1/22

Board of  
Directors  
Retreat  
facilitated by  
Sarah Manion

2/3

Calmer Choice  
Staff Workshop  
facilitated by  
Adam Brock from  
Regenerate  
Change

Notes were synthesized for common themes, consensus, and differences. Summary findings were circulated for comments and feedback.

The Strategic Planning Committee began meeting in early February, mapping out the planning process to take place over 7 meetings, culminating in a joint retreat for both Board and Staff.

2/9 – 3/9

Define Who, What,  
Where, Why, How

3 MEETINGS

week of  
3/23

Touchdown &  
Feedback –  
Board and Staff

4/6 – 5/4

Create framework  
and workplan

3 MEETINGS

6/17

Joint Meeting to  
Present Final Plan  
Framework to  
Board and Staff

The Staff conducted several working sessions to discuss and finalize the theory of change, mission, vision, and values.

The Leadership Team met regularly between Strategic Planning Meetings to work through the plan's details, focusing heavily on Year 1.

# CORE PRINCIPLES

## *mission*

Cultivating Awareness. Living Mindfully. Enhancing Resilience.

## *Vision*

We envision a world where...

People lead lives of kindness and compassion toward themselves and others.

Young people learn skills to cope with the pressures of the world around them, building a foundation for lifelong health and wellbeing.

Schools integrate mindfulness into their cultures.

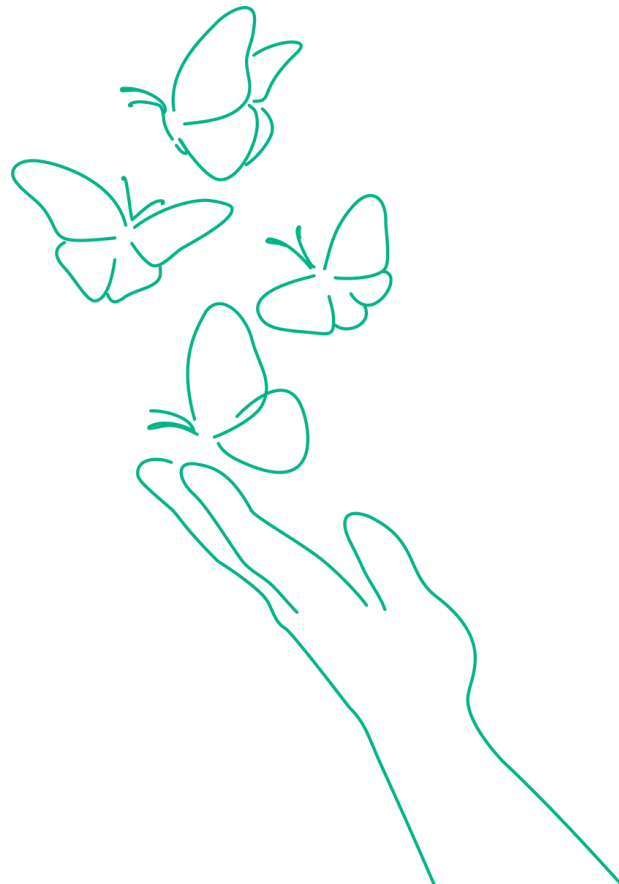
## *values*

Calmer Choice values wellbeing, compassion, and making a difference...grounded in integrity.

# Theory of change

Calmer Choice serves children and those who support them on Cape Cod and surrounding regions by providing evidence-based mindfulness education, training, and mentorship to build resilience, foster compassion and nurture the wellbeing of all people and communities.

Utilizing our innovative, research-informed curriculum, we work in classrooms and community spaces to support individuals in reconnecting with the inner capacities they need to feel grounded, resourced, and capable of leading lives of kindness and compassion towards themselves and others.



## introduction

Program services are the heart and soul of Calmer Choice. As an organization, we understand that our potential for positive impact is rooted in our ability to reflect and practice internally what we are promoting to our school and community partners externally. This acknowledgement comes with a responsibility to invest time, energy, and resources into forming a strong internal foundation of people, knowledge, and capacity to support our external service work.

Moving forward, programming will operate under a “people first” leadership and management approach. This means we will center and prioritize people, culture and emotions to encourage a resource-rich environment where mutual flourishing naturally creates positive ripple effects that touch all those with whom we come in contact.





# new program approach

Our programmatic approach is rooted in the belief that there are 3 core components needed to live life mindfully:

## education

The knowledge, tools and skillsets necessary to understand the benefits and practice of mindfulness and how to integrate it into our daily life.



## mentorship

The support of those with more/different lived experience from our own to help encourage the translation of our education from intellectual to embodied understanding and practice.



## community

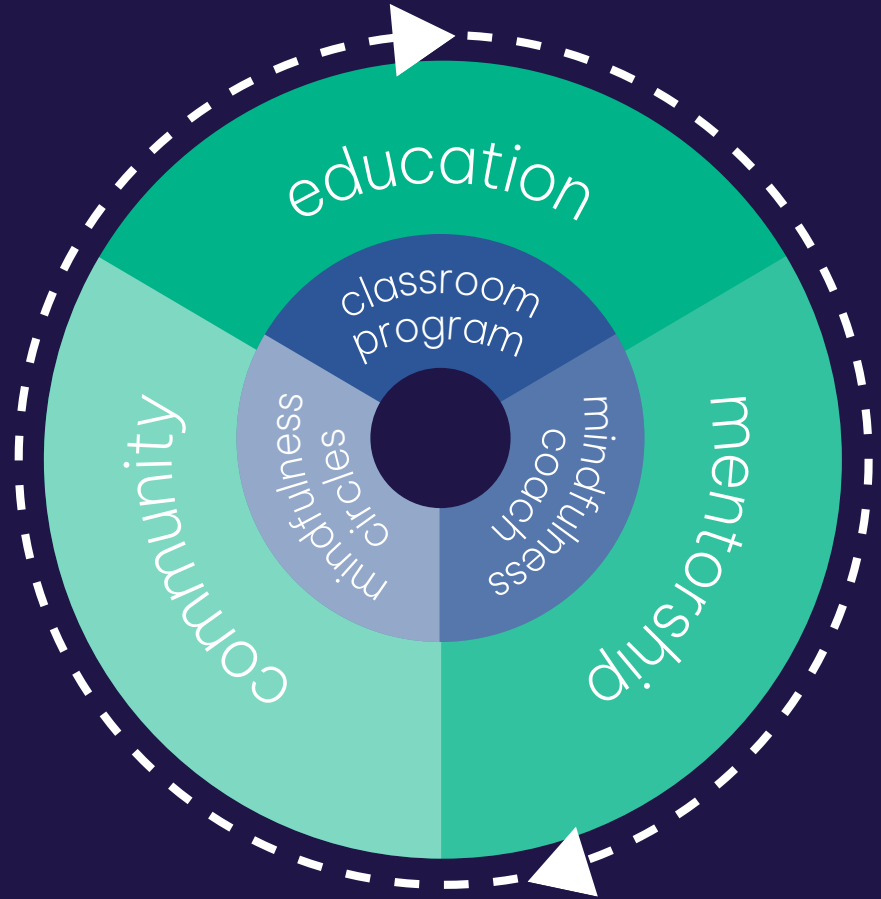
A safe and connective space where we can nurture our own regular practice and learn from the diverse experiences of others.





PROGRAM  
MODEL

*wellbeing*



*compassion*

*resilience*

# messaging strategy

Calmer Choice is making an intentional shift towards the language of evidence-based mindfulness as a mode of clearly articulating the lineage of our practice approach. As an evidence-based organization, we align ourselves with the bodies of research and literature that support the use and practice of mindful awareness as effective techniques to build resilience, foster compassion, and nurture wellbeing.

YEAR 1

Broad Intent: **Seed Change**

Clear Focus: **Pilot New Program Model**

Goal 1	Rebuild Instructional Capacity to Support Core Service Delivery
Goal 2	Pilot New Program Model (Classroom Program + Mindfulness Circles + Mindfulness Coach)
Goal 3	Cocreate and (Re)establish Team Culture

YEAR 2

Broad Intent: **Cultivate Knowledge**  
Clear Focus: **Assess & Develop Program Model**

Goal 1	Reflect & Evaluate Pilot Implementation of New Program Model
Goal 2	Integrate Learnings & Revise Model (if needed)
Goal 3	Solidify Instructional Capacity & Programming Skillsets

YEAR 3

Broad Intent: **Grow Community**  
Clear Focus: **Expand Services & Partnerships**

Goal 1	Thoughtful Growth of Program Services in Line with Capacity / Community Need
Goal 2	Develop and Implement Program Evaluation Strategy & Research Partnerships
Goal 3	Launch Calmer Choice Summer Mindfulness Institute

## introduction

Calmer Choice has gone through a tremendous amount of change since adopting its last Strategic Plan. The Founder's retirement coupled with strategic new hires and the departure of several long-tenured employees have had a profound impact on the organization's culture. Caring and compassion remain bedrocks of our culture. They are being joined by collaboration, individual and shared accountability, and business acumen as the new team takes shape. Nurturing our internal culture will be critical to delivering this new Strategic Plan.

## staff culture & development

The Staff, collectively, is in its infancy. There's a new Leadership Team, several new instructors, and a new program delivery model. The culture of this "new" organization will be defined over the coming months and years. This plan provides concrete steps that are critical to creating a culture of collaboration, compassion, shared purpose, and accountability.

## board development

The culture of the Board, like the Staff, is at an inflection point. Several important and influential founding members will be transitioning off the board during the next 3 years. Over the last 2 years the organization has added several new members. The combination of these events will dramatically lower the overall tenure of the Board. It also provides the opportunity to further strengthen and diversify the Board to better reflect the communities we serve. Having completed an initial introduction to diversity, equity, inclusion, and belonging the Board now needs to agree on and implement next steps to ensure lasting and meaningful change.

# succession planning

On the Staff side, along with a new Leadership Team, we will continue succession planning to prepare and protect the organization. Acquiring and retaining talent is critical to the long-term viability of Calmer Choice. Likewise, the Board will identify and nurture its next round of executive officers, ensuring ongoing governance and oversight.

**GOAL 1** Broad Intent: **Nurture Team Culture**  
Clear Focus: **Center collaboration, compassion, shared purpose, and accountability**

Year 1	<ul style="list-style-type: none"><li>• Embark on intentional diversity, equity, inclusion and belonging (DEIB) work</li><li>• Create feedback and communication systems for all staff</li><li>• Encourage and continually nurture community practice through intentional resource allocation</li><li>• Integrate organizational values into HR policies and procedures</li></ul>
Year 2	<ul style="list-style-type: none"><li>• Integrate DEIB learnings</li><li>• Evaluate/fine-tune feedback and communication systems</li><li>• Explore opportunities to more fully reflect/integrate our shared values across the organization</li><li>• Create personal and professional development paths</li></ul>
Year 3	<ul style="list-style-type: none"><li>• Evaluate leadership structure</li><li>• Explore additional investments in staff benefits</li></ul>

## GOAL 2

Broad Intent: **Strengthen our Support Systems**  
Clear Focus: **Cultivate & Rejuvenate the Board**

Year 1	<ul style="list-style-type: none"><li>• Appoint new members to expand our representation of diverse life experiences and skillsets</li><li>• Define next steps regarding DEIB work</li><li>• Incorporate 3x3 relationship cultivation to solidify engagement</li><li>• Leverage board members to attract new and cultivate existing donors</li></ul>
Year 2	<ul style="list-style-type: none"><li>• Evaluate board committee structure and recommend changes</li><li>• Evaluate board meeting structure and recommend changes</li><li>• Leverage board members to attract new and cultivate existing donors</li></ul>
Year 3	<ul style="list-style-type: none"><li>• Define role of Advisory Board and create engagement plan</li><li>• Leverage board members to attract new and cultivate existing donors</li></ul>

## GOAL 3

Broad Intent: **Care for the Future**  
Clear Focus: **Define Board & Organizational Succession Plan**

Year 1	<ul style="list-style-type: none"><li>• Evaluate bylaws and recommend changes, if any</li><li>• Evaluate officer appointment protocols and recommend changes, if any</li><li>• Evaluate CEO review process and recommend changes, if any</li></ul>
Year 2	<ul style="list-style-type: none"><li>• Create pathway of potential new board members</li><li>• Define organizational succession plans for key positions</li><li>• Develop search procedures for key positions</li></ul>
Year 3	<ul style="list-style-type: none"><li>• Establish development path for key positions</li></ul>

## introduction

Sustainability is the cornerstone of any organization, be it for-profit or non-profit. This plan outlines steps required to move Calmer Choice to a place where the organization can eventually sustain itself financially. For sure the continued generosity of our supporters will be welcomed and encouraged. This plan provides the framework for a business model that will generate sustained revenues, allowing the organization to become less dependent on fundraising over time.

## defining & planning programmatic scale

The District Model creates a revenue stream while minimizing financial risk. We will pilot this model in Year 1, allowing us to fine-tune and adjust before expanding. Piloting provides the opportunity to assess capacity and allows for phased, measured growth in Years 2 and 3. Additionally, we will look to design revenue-generating programs to support community and one-on-one engagement.

## long-range budget planning

The District Model pilot as well as the Capacity Building work with the Cape Cod Foundation in Year 1 will help inform our long-range financial forecast. The organization will also build on the financial reporting, budgeting, and forecasting framework created as part of the Strategic Planning process. Streamlined invoicing and payments and enhanced procurement protocols to ensure routine review of contracts and vendors will improve efficiency. Formal contracts with school districts and community partners will protect the organization and mitigate operational risks.



# long-range staffing plans

The Capacity Building work with the Cape Cod Foundation will create a baseline for long-range staffing. Implementing the District Model for programming will help minimize the financial risk associated with employee expenses. The organization will methodically add to staff when appropriate. Enhanced human resource protocols will improve acquisition and retention of talent and protect the organization from reputational and employee-related risks.

## GOAL 1 Broad Intent: **Sow Seeds for Abundance** Clear Focus: **Develop & Implement Financial Model to Support Programs**

Year 1	<ul style="list-style-type: none"><li>• Pilot and fine-tune the District Financial Model for delivery of Calmer Choice programming</li><li>• Design fiscal/operational roadmap to engage and onboard new school districts</li></ul>
Year 2	<ul style="list-style-type: none"><li>• Implement District Model in additional school districts</li><li>• Implement revenue-generating programs to support community and one-on-one engagement</li></ul>
Year 3	<ul style="list-style-type: none"><li>• Implement District Model in additional school districts and/or deepen programming in existing districts</li><li>• Expand programs to support community and one-on-one engagement</li></ul>

## GOAL 2

Broad Intent: **Steward our Processes**  
 Clear Focus: **Implement Financial Protocols**

Year 1	<ul style="list-style-type: none"> <li>• Assess current contracts</li> <li>• Implement vendor procurement procedures</li> <li>• Create formal contracts for schools and community partners</li> <li>• Research new grant opportunities</li> </ul>
Year 2	<ul style="list-style-type: none"> <li>• Formalize development outreach, engagement, and retention program</li> <li>• Leverage fundraising software to improve efficiency</li> <li>• Streamline/automate invoicing and payments</li> <li>• Evaluate project management solutions</li> </ul>
Year 3	<ul style="list-style-type: none"> <li>• Research endowment requirements</li> <li>• Implement a “major gift” program</li> <li>• Implement project management solution</li> </ul>

## GOAL 3

Broad Intent: **Tend our Resources**  
 Clear Focus: **Implement Human Resource Plan**

Year 1	<ul style="list-style-type: none"> <li>• Complete Capacity Building engagement with Cape Cod Foundation</li> <li>• Formalize HR policies and procedures for onboarding, off-boarding</li> <li>• Fine-tune District Model staffing based on pilot results</li> </ul>
Year 2	<ul style="list-style-type: none"> <li>• Implement recruiting, hiring, and training model to support expansion of District Model to additional school districts</li> <li>• Formalize annual performance review process</li> <li>• Evaluate HRIS options</li> </ul>
Year 3	<ul style="list-style-type: none"> <li>• Implement HRIS solution, including payroll, performance review, etc</li> </ul>

"This is really helpful for me.  
Thank you for teaching us this.  
I use it a lot."

- 4th grade student,  
Middleboro Public Schools





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[calmerchoice.org](http://calmerchoice.org)