SAN FRANCISCO ZEN CENTER

Widening the Circle

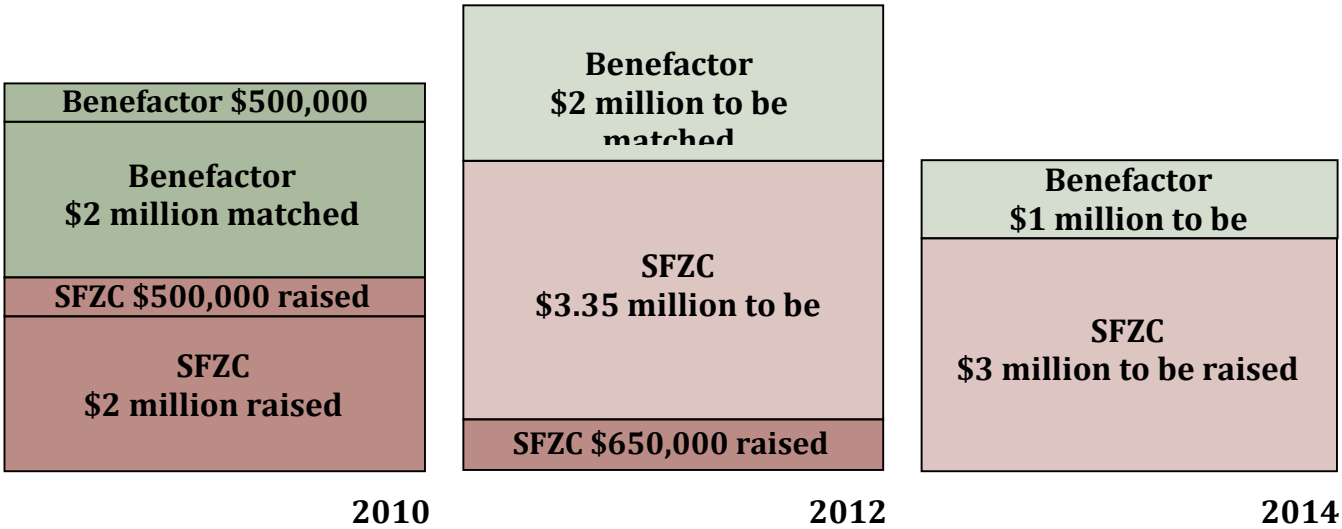
a vision of interconnectedness and possibility

The Campaign for San Francisco Zen Center

Update 3: October 22, 2010

Progress in Meeting the Campaign Challenge Grant

As reported in the previous updates, we have met the terms of the first challenge set forth in June 2009, and $2.5 million (which includes a performance bonus of $500,000) has been vested and is being held for us to be released at the end of the capital campaign. In anticipation of a successful campaign, this benefactor has placed the entire matching grant of $5.5 million—designed to establish an endowment for Zen Center's long-term financial health—in an account that is currently invested and gathering interest and dividends. We are currently working on meeting the terms of the second challenge in which we must raise a total of $4 million in cash and new pledges before year-end 2012 in order to have another $2 million vested for the endowment.



Where we are in our fundraising today

Reaching our Goals

We are pleased to take a breath and celebrate the success of the fundraising efforts that have borne fruit since our last update. We are now poised to begin construction on two major building projects: the Green Gulch Farm Resident Housing and the Tassajara Retreat Center. We thank all of you who have come forward, and those of you who are still considering ways to offer your support.

Our strategy has been to break the overall milestone of the current $4 million challenge into manageable pieces, seeking first to fund those projects that, once completed, will serve to immediately:

- Begin generating an increase in ongoing revenue for the organization
- Support our ability to offer more dharma
- Connect more directly with a wider circle of support

Our immediate focus is to raise $750,000 by May 2011:

$150,000	Tassajara Retreat Center
$55,000	ADA bathrooms
$60,000	Solar Panels
$175,000	Fourth Practice Center
$150,000	City Center Master Plan
$100,000	Senior Living Facility development
$60,000	Support Costs
$750,000	Total

As we continue to identify and cultivate those whom we hope will become major supporters of our near-term efforts, we are putting special attention and care to building new relationships and attracting a cadre of advisors whom we hope will work alongside us to ensure our financial health and relevance going forward.

Facility Improvements at Green Gulch Farm

Green Gulch Farm Student Housing

OUR PROGRESS

Fundraising for Green Gulch Farm student housing is complete and the permits for the project have been granted by the County. A groundbreaking ceremony was held on October 14th.

Photo by Judith Keenan

Work completed to date

<u>First week of September: Demolition</u>
Old trailer structures have been taken down and all reusable materials have been salvaged.

<u>Second week of September: Excavation</u>
Foundations have been excavated in preparation for construction to begin.

<u>First week of October: Concrete slab foundations poured</u>

The building is being assessed, as it is built, by the highly regarded national organization Build It Green and will be GreenPoint Rated determining its green credentials at the completion of construction.

Ken Sawyer, a former Green Gulch resident and principle of Sawyer and Son Construction has been hired as project contractor. Current estimates are that the project will be completed within 12 months. The architectural firm of JSW/D has been working with the Green Gulch Farm staff for the last year, with Helen Degenhardt, architect of the Tassajara bathhouse as well as the remodels of both the Green Gulch Farm zendo and Tassajara dining room, taking the lead.

The multi-unit passive house (a design resulting in an energy consumption decrease of 90 percent over normal to-code buildings) will accommodate eight people and is currently understood to be the first eco-dorm in the country.

Work on Other Green Gulch Projects

Green Gulch Farm is currently in the process of clarifying a list of infrastructure projects that will be funded by the capital campaign. These will balance current deferred maintenance needs with an understanding of the infrastructure that will be required to support the buildings that are part of the Campaign (a new Kitchen/Dining Hall and a new Welcome Center) and which are an expression of our long-range vision plan.

Creek Restoration Project

OUR PROGRESS

Thanks to a significant grant from the California Department of Fish and Game and an associated grant from the Marin Community Foundation, Zen Center has been able to engage the services of Prunuske and Chatham, Inc. (PCI), an environmental restoration services firm located in Sebastopol, to manage the creek restoration project.

PCI has now finalized the creek restoration plan for the lower part of the creek (from the pond outside the zendo down to where the GGF land ends), and has presented this plan to the Green Gulch Farm environmental committee for review and approval.

Further funding will be needed in order to complete work on this project as the grant from the California Department of Fish and Game is enough to begin but not complete this work. Our current plan is to re-apply to the Department of Fish and Game for additional funding as well as to begin looking to other funders for grants in support of this work.

We are currently soliciting proposals from creek restoration firms, asking them to propose a design for the restoration of the upper creek. This proposal will include the dam behind the kitchen as well as that in the upper parking lot. The proposal will identify what we can do in the short term, as well as ways in which the design will tie into the long-range plan to “move the creek,” allowing it to pursue its natural path through the property.

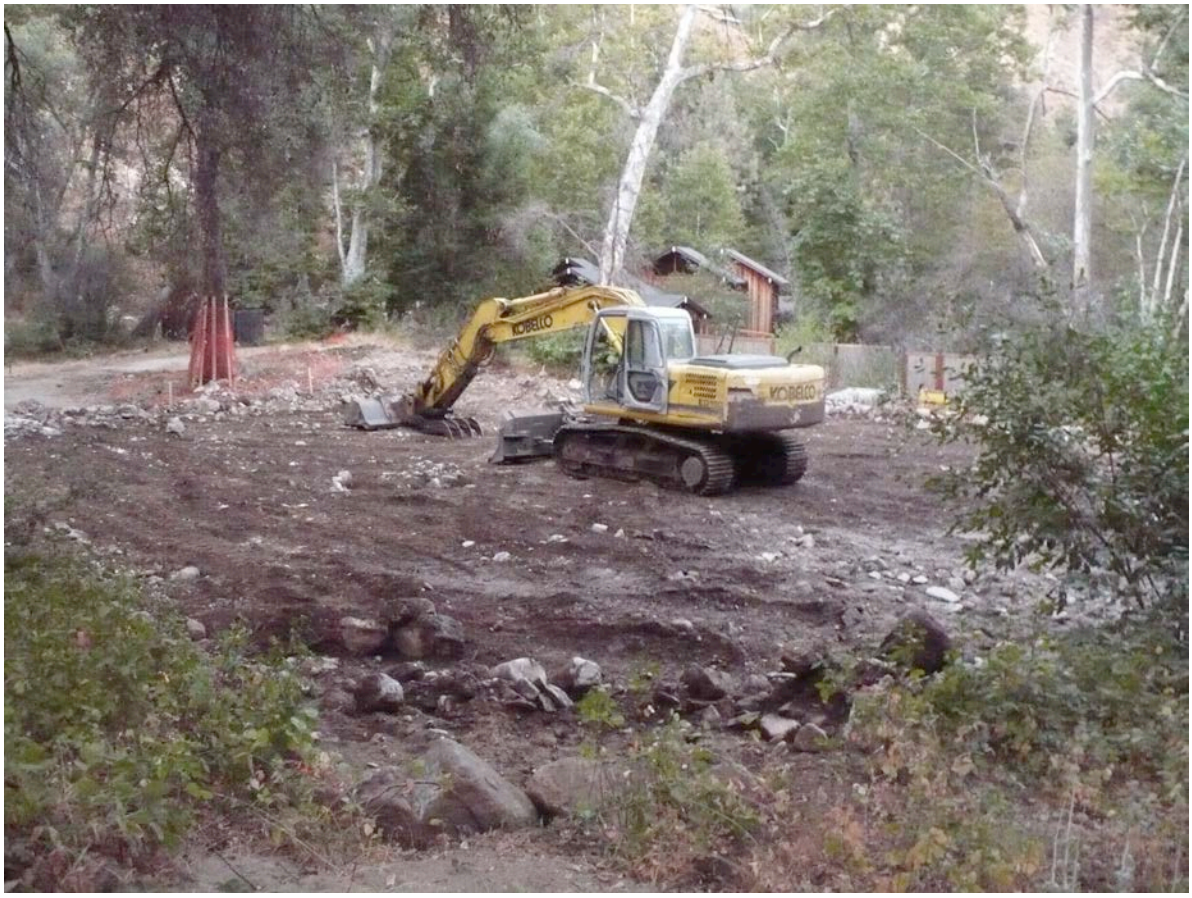
Facility Improvements at Tassajara

Long-Term Vision and Restoration Planning Project for Tassajara

OUR PROGRESS

The design work on the long-range vision and planning process for Tassajara has been completed, and a long-range vision and restoration planning document (similar to that currently existing for Green Gulch Farm) will be presented to the San Francisco Zen Center Board at the end of October for their consideration. We anticipate being able to share the final document with you in our next Update.

Retreat Center



Ground was broken on October 4, 2010

OUR PROGRESS

The retreat center will be a spacious new facility with two multi-purpose rooms and will be located just down from the old yurt, near the new massage gazebo. The design

for the building uses thermal mass to cool the building in the summer, saving energy as no mechanical cooling systems (air-conditioning) will be required. In addition the use of solid mass—walls on which plaster is rendered on top of a concrete surface—will provide additional cooling. A radiant floor, using hot springs water to heat it, will be installed so that the temperature of the building will be kept steady in the winter months, when it is used by the Zen students participating in the fall and winter practice periods.

Through the generosity of many donors, enough funds were raised for the Board to green light the project in July. During the final permitting process, the construction budget increased slightly and the county added some requirements, including ADA-accessible bathrooms, which have raised the overall budget for the project. Therefore, fundraising for this project continues, with a goal to complete funding by May 1, 2011 to allow for the retreat center to be available for the 2011 guest season. Therefore, we need to raise $150,000 for the retreat center and $55,000 for the bathrooms.

Infrastructure: Solar Panels

Photo by Judith Keenan

OUR PROGRESS

The installation of four additional solar arrays at Tassajara is now complete, bringing the total number of arrays to eight. As hoped, this project—overseen by Sun, Light and Power, the Berkeley-based clean energy firm who worked with us on installing solar panels on the roof at City Center—is now serving to meet the energy requirements of the Tassajara practice and summer guest community, particularly during the peak of summer when energy use is at its highest. Additional good news! The installation is now able to produce 20% more of the energy needs than had been projected to be necessary over the next five years.

With heat and hot water provided by the natural hot springs and electrical needs provided by the sun, the kerosene used to light the cabin lamps in each cottage and walkways is now the only petro-chemical product in use at Tassajara (outside of the emergency generator which is backed up every two weeks).

The project has already garnered attention as Zen Center was recently named a finalist for an "Energy Oscar" award through California Interfaith Power and Light. The award ceremony will be held on November 9th at Grace Cathedral in San Francisco. Check the next Update to see if we are a winner!

Fundraising continues for this project, with an additional $60,000 left to raise, as engineering issues in running the cable down the mountain caused us to incur additional costs on the project.

Facility Improvement at City Center

Long-Range Vision and Restoration Planning

Long-range vision planning began for City Center in April with the convening of 16 stakeholders from the community, who have been meeting once a month. The process of vision planning is necessary to understand the best way for the spaces at the City Center to be utilized in support of a clear vision of the City Center as an urban temple.

The next step in the process will be to engage with the Mithun Design team (the San Francisco-based design firm whose similar work with us on both Green Gulch Farm and Tassajara is complete), to see how the Page Street buildings, including the Julia Morgan-designed temple building, can support a robust residential community, a greater sense of welcoming, and a variety of program offerings.

Once we have raised the $150,000 needed to support this project, the Mithun Design team process is expected to take between 3-4 months. Their presentation at the end of

that time will serve to support the vision for City Center, whose manifestation will be the task of the City Center Design Group, and whose members, which consist of the Abbots as well as key members of the residential and extended sangha community, is yet to be determined.

Alongside the discussions and decisions around the design and space use, the financial impact of the re-visioning of this practice center will also be considered. An infrastructure plan providing a number of possible options will be reviewed, and one will be chosen by the City Center-based design group. Mithun will then return with a clarified vision which will be presented to the team for review.

Note: due to the success of having two construction projects starting this fall, we have decided that it would not be wise to add this important design project to our schedule at this time. While fundraising for the project is currently underway, we have chosen to delay the start of our conversations with Mithun until later in 2011.

The Fourth Practice Center

THE NEED

The Fourth Practice Center initiative is conceived as an extension of our three existing practice centers to the Internet—an online environment supporting Zen practice, study, teaching, and community from remote and disparate locations. Based on the web and weaving together multiple communications channels, including email, social media, and live web conferencing, the fourth practice center will dramatically expand Zen Center's ability to express the wisdom and compassion of the Buddha.

More specifically, the fourth practice center will be designed to meet one of Zen Center's most important challenges: supporting an ever-widening community in connecting with, and staying connected to, the teachers and practice offered by Zen Center. Once developed, it will serve as a hub of Zen Center activities, a site for all community members—no matter where they may be living—to visit for a variety of practice, study, and social purposes. With tools for interacting with Zen Center and with each other, a rich array of archival and current media content including audio, video, photo, and texts, and intuitive but powerful methods for searching, sorting, and sharing, the fourth practice center will provide a uniquely dynamic and personalizable experience of Zen dharma for people everywhere.

OUR PROGRESS

In May 2010, Zen Center hired Laura Trippi as Director of Web Services to coordinate all Zen Center web efforts as well as to lead the process of designing and building the

fourth practice center. Laura's first responsibilities were to familiarize herself with Zen Center's web-related systems and to stabilize the existing website and web-related services. As a result of her analysis, and of shifting tides in the web environment, the focus and roadmap for developing the fourth practice center is being revised.

The process of better understanding where we were

A early decision was to put the "refresh" redesign of the current Zen Center website, discussed briefly in the last update, on hold, in favor of first addressing pressing functional issues: our ability to support online membership and donations, fixing the Tassajara web reservations process, and improving our use of web-based mailing lists. In documenting Zen Center's web systems and workflow, it quickly became apparent that basic functionality defining the users' interaction with Zen Center online should take precedence over navigational concerns.

At the same time, a larger process of integrating Zen Center's various IT systems was coming to the foreground, driven on the one hand by the Development Department's need for more effective Customer Relationship Management software (CRM), and on the other by an interest in centralizing and streamlining the reservations process across the three centers. In both, it was recognized that web services play a key role in supporting user interaction with Zen Center while also realizing that the social vision of the fourth practice center will require that the website and systems share data more or less in real time with other Zen Center IT systems.

This understanding showed us that our priority needed to be to create an integrated "customer" database solution that ties smoothly into the new website. For this reason, attention has turned to coordinating web development efforts with the systems integration project.

At its core, the fourth practice center will be a dynamic digital architecture, fostering lasting social relationships and meaningful interaction with an array of information and resources. In addition to integrating with the new CRM, the fourth practice center also requires moving to a sophisticated new and forward-looking Content Management System (CMS).

A road map for where we are going

Having documented and stabilized web systems, and begun to form a shared vision of integrated IT systems, planning is underway for a phased and iterative approach to development of the fourth practice center. This begins with rolling out a new blogging platform for expanding Sangha-e and other Zen Center weblogs. This same platform could potentially serve as an interim social network to replace the previous effort at a

community site, which failed to take root. At the same time, we're looking to transition to a new e-commerce solution for memberships, donations, and the bookstore, as well as classes and other events.

However, the major undertaking here is the move to a new CMS. Our intention is to adopt an agile and iterative (or incremental) approach, so that we can learn from what has worked and is and isn't working, in the process of transitioning to a new platform.

An exciting test run of the project

The upcoming Zen Translation Forum to be held in a series of four locations over the weekend of November 5-6, will allow us to engage in a conscious test run our new approach to offering live digital dharma events and teachings, to a geographically diverse audience of interested participants. Streaming the New Year's Eve services and bell ringing at Green Gulch Farm will provide another opportunity.

Our vision is for Zen Center to use the internet as a vehicle to connect people practicing in their particular body and space, with others practicing in their body and space—perhaps just down the street or perhaps across oceans—and to invite them to participate in a weaving together of different communities to create one interconnected whole.

The additional funds we are raising for the fourth practice center will be allocated to infrastructure, staffing, and early investment and testing of different business strategies in such a way to use this new offering as a means of generating an ongoing stream of income for the organization.

Community Programming

THE NEED

As a major part of our strategic plan, we are building a programming infrastructure that will include additional staffing and strategic communications plans to increase the consistency and variety of our offerings, and ensure that programs can be offered to a wider public—at our practice centers, on our website, as well as in the wider community. We are focusing on the initial strategy of our enhanced programming efforts by funding the integration of our data bases, reservation systems and website.

Senior Living Facility

THE NEED

Zen Center's Elder Monk Policy establishes a program for residents—past and present, who have given at least 20 years of service on staff and have reached the age of 70—to provide room and board for the rest of their lives. Because Zen Center does not have enough rooms available to provide for the number of potential retired monks (which at this moment consists of 30 people who have given at least 20 years, four of whom have reach the age of 70), nor are there any facilities set up to care for monks as their physical needs change, we began exploring options for meeting this need.

In August 2006, a survey of 1,000 current and former Zen Center residents and members was conducted to measure the interest of people associated with Zen Center in a senior living community designed and operated in line with Buddhist themes and principles. In 2008 another survey of 5,000 people was conducted by Gerontological Services Inc., (funded through our arrangement with NCPHS) with a very robust return rate, and strong interest expressed by the majority of participants in moving into such a community. An update on the results of the survey was recently released to all who participated. If you would like to receive a copy, please contact Zen Center Vice-president, Susan O'Connell at susan.oconnell@sfzc.org.

OUR PROGRESS

We have continued to meet with our counterparts at Northern California Presbyterian Homes and Services (NCPHS), to expand on and articulate our shared vision of our partnership. Zen Center recently held its own facilitated process to clarify our needs for authority and ownership, and our vision for staffing in key areas of responsibility in the proposed facility. These areas include Meditation Hall, Food, Garden/Farm, Health Care, Programs (including dharma offerings), Administration (including Marketing), Housing, and Compassionate Care Training.

We will be meeting in the next month with NCPHS to further envision our partnership which will be based on what each group is providing, and our need for protecting and promoting the Zen-inspired aspects of the community.

When this next step is taken, we will be ready to go forward with a letter of intent on a piece of property that is currently available.

In order to provide the funds for Zen Center to work with an attorney and an experienced Senior Living consultant, we are going to communicate with those people who expressed interest in contributing financially to this effort. Our goal is to raise $100,000 to take this effort forward.

To receive more detailed information on this cutting-edge project, please contact Zen Center Vice-President Susan O'Connell directly.

Addendum

We would love to hear from you. If you would like to discuss any of the projects of the capital campaign or receive additional information, please contact any of us below.

To read our first two white papers and updates and to offer your comments, suggestions, or ask questions online, please contact any of those whose names are listed below.

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Thank you very much for your interest and support.