

GUARDIAN
FOLLOW-UP PSU

Base Centrum
April 20-22, 1973

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P S U FLOW CHART

Base Centrum

Fiscal Affairs	Economic Development	Global Procedures	Civil Relations
Facility Procure. 10 Recommend.	Development Practicum 10 Recommend.	Overseas Support 10 Recommend.	Legal Grounding 10 Recommend.
Investment Design ""	Capital Funding ""	International Develop ""	Secular Permeation ""
Future Projection ""	In-Kind Intensificat ""	Global Deployment ""	Consultant Network ""

129
Recommendation
Gestalt

9 Recommendation Arenas

Manage Real Estate Acquisit- ion	Increase Income Potential	Husbandry of Order Funds	Nurture Guardian Formulat- ion	Implement Human Resource Index	Anticap- atory Fiscal Policy	Build Develop- ment Network	Foster Movement Sophisti- cation	Manage Global Interch- ability
↓	↓	↓	↓	↓	↓	↓	↓	↓

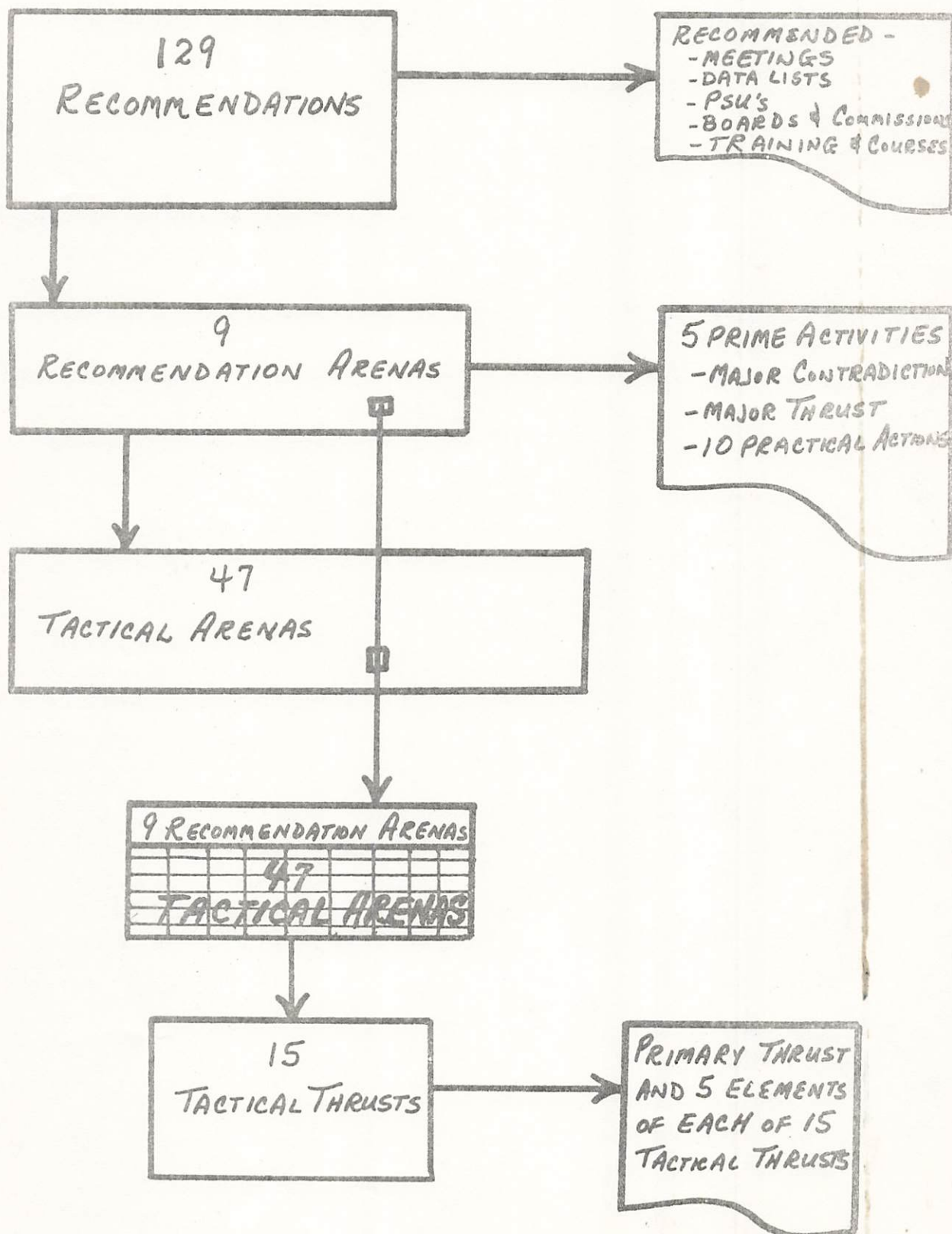
Tactics Gestalt

(And so on for each recommendation arena)

TACTICS
GESTALT

Tactical Arenas Within 1 Recommendation Arena

Order Property Data and Dissemination	Inventory Movemenal Legal and Managerial Resources	Facilities Procurement Model	Legal Planning	Maximize Property Effectiveness	Business Division Organization and task
Tactics ↓	Tactics ↓	Tactics ↓	Tactics ↓	Tactics ↓	Tactics ↓



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47 TACTICAL ARENAS UNDER 9 RECOMMENDATION ARENAS

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RECO MEN- DA TION ARENA	1	2	3	4	5	6	7	8	9
	MANAGE REAL ESTATE ACQUISITION	INCREASE INCOME POTENTIAL	HUSBANDRY OF ORDER FUNDS	NURTURE GUARDIAN FORMULATION	IMPLEMENT HUMAN RE- SOURCE INDEX	ANTICIPA- TORY FISCAL POLICY	BUILD DEVELOPMT NETWORK	FOSTER MOVEMENT SO- PHISTICATION	MANAGE GLOBAL IN- TERCHANGBLTY
T A C T I C A L A R E N A S	1 Order Prop erty Data & Disseminatn	7 Public Relations	12 Structure for Order Investments	19 Support System	24 Service Promotion	29 Building Fiscal Ev- altn Schem	32 Building Lng.Rnge Re srch/Doord Devel Sys	37 Prepare Sophisticatd Imag Materls	43 Internat. Employment Opportunity
	2 Inventory Movemtl legl & Managerial Resources	8 Promotion Materials	13 Research Insurance Investment	20 Ongoing Zeal	25 Systems Formulation	30 Estab. FiscI Poss ibilty & Priority	33 Structrg Design of Glob Devel. Network	38 Create Contact Thru-Put System	44 Internat. Order Employ Placement
	3 Facilities Procurement Model	9 Legal Support Research	14 Actualze Integrated Investment System	21 Guardians Odyssey & Global Consult	26 Data Gathering	31 Fiscal Policy Operations	34 Implemtg Local Devel Operations	39 Movement Image PSU	45 Consoli- date Visa Information
	4 Legal Planning (Tax Havens Ecumen Par)	10 Opera- tional Research	15 Artic- Investment Policy	23 Guardians as Popular Preachers	28 Data Use and Evaluation		35 Manufac- trng storis Sust. patr- onge Rels.	40 Local Image Adaptation Guidelines	46 Guardians Devel. Inter- national Clout
	5 Maximizng Property Effective- ness	11 Develop. Money-Rais- ing Courses	16 Study Recommended Investments	23 Guardian Recruitment	28 Proce- dures for Need Pro- curement		36 Direct Solicita- tion	41 Estab. Access thru Service Club	47 Create Global Legal Base
	6 Business Division Or- ganizatr & Task		17 Research on Tax Structure					42 Regular Quarterly Reporting	
			18 Estab Legal Stru- cture for Order						

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Recommendation Arena #1
REAL ESTATE ACQUISITION AND MANAGEMENT

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Recom- menda- tion #	Recommendation
1	Property Centrum
2	Manual of Property Acquisition
3	Existing Facilities Acquisition History
4	Ecumenical Parish Master Plan
5	Lakeside Property Acquired
6	Global Real Estate Guild
8	Movement Holding Company
9	Facilities Procurement Consultation Staff
10	Corporation Tax Shelters
20	Real Estate Coordinator
21	Centrum Business Division
104	Area Housing Leased or Purchased
105	Legal Documents File

Recom-
menda-
tion #

Recommendation

- | | |
|----|---|
| 71 | Teaching English to Foreign Nationals Business |
| 73 | Market Practical Research Capabilities |
| 74 | Short Term Cultural Immersion Course |
| 75 | Marketing Local Cottage Skills |
| 76 | Network of Marketable Translation Services |
| 78 | Market Methods of Community Reformulation |
| 79 | Global and Area Odyssey Service |
| 85 | Comprehensive Specification of Movement Services |
| 87 | Globalized Context of Auxiliary Services |
| 88 | Cultural Orientations Course Materials and Teaching Tools |
| 95 | Global Employment Opportunities Be Created |

Recommendation
#

Recommendation

- | | |
|-----|--|
| 11 | Investment Policy Board |
| 12 | Order assets Entity |
| 13 | Insurance Program Experts |
| 14 | Order Youth Education |
| 15 | Investment Policy Guidelines |
| 16 | Investment Strategies |
| 17 | Outside Accounting Services |
| 86 | Religious House Non-Profit Corporations |
| 100 | Ecumenical Institute Incorporated in every state and country |
| 101 | Order Non-Profit Legal Entity |
| 102 | Minimize Tax Liability |
| 103 | Determine Potential Liability |
| 106 | Comprehensive Model Care of Order Members |

Recom- menda- tion #	Recommendation
30	Revolutionary Fiscal Principles Training
110	Socio-Spirit (edge)/Style Workshops
111	Research Popular Preaching
112	"Desert" Nurture Model
121	Grid Current Movement Contradictions
124	Sophisticated and Movemental Wisdom Training
128	Guardian Recruitment, Teaching, and Preparation for Lens Courses
117	Speaker' Bureau Preparing Three Classical Talks on Resurgence (A Spirit Travelogue)
118	2 Methods Manuals on Spirit Deepes
82	Global Guardian Net
89	Global Group of Guardians
129	Guardians Form a Global Odyssey

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Recommendation Arena #5
HUMAN RESOURCE INDEX AND IMPLEMENTATION

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Recom- menda- tion #	Recommendation
7	Inkind and Phase 4 Services to Reduce Operating Costs
18	Directory of Movement Guardians
28	Human Resources Data Bank
29	Guardian Sabbatical Program
97	Models for Guardian Participation in "Overseas" Mission
72	Pay to Use a Wayside Inn
120	A Guardians Directory
122	Guardian Data Bank
123	Guardian Spirit Nurture
125	A Comprehensive Checklist for Consulting Assignments
127	Consultants Assignment Rationale

Recom- menda- tion #	Recommendation
24	Weekend Fiscal System Seminars
26	Five-year Fiscal Plan
25	Fiscal Model PSU
84	Global System of Money Management
119	Lens Financial Guidelines and Speaker Bureau Honorariums
27	Office of Vision and Response

Recommendation #	Recommendation
19	Additional Funds Solicitation
22	Integrated Development Efforts
31	Development Office Role
32	Regional Development Co-ordinator
33	Development Practicum
34	Annual Fund-Raising
35	Metro Development Network
36	Development Training Events
37	Accountability and Pledge Acknowledgment
38	Local Needs Financed From Courses
41	Share Miracle Stories
42	Patrons Miracle Stories
43	Workshops to Impact Patrons
44	Penetration of Social Structures to Contact Patron
45	One-year and Five-year Development Battleplans
47	Honor Patrons with Recognition for Significant Support
48	Patron Procurement Plan
49	System of Nurture and Sustaining of Patrons
51	Matrix of Data, Stories and Sample Proposal
53	Capital Funding Shared by Movement Guardians
54	Tailor Presentation to Corporations and Foundations
55	Metro Capital Fund Task Force
57	Accounting to Donors for our Stewardship
58	Data Interchange Report on Fund-raising to Guardians

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Recommendation Arena #7
MOVEMENT DEVELOPMENT NETWORK
(con't)

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Recom-
menda-
tion #

Recommendation

59	Interchange and Evaluation of Areal Fund-raising Strategies
60	Expanding In-kind Strategies
61	In-kind Strategy Sessions
63	In-kind Donor Recruiting System
64	Current and Futuric Needs by Categories
65	Current In-Kind Requirements File
66	Resource Files and Reference Materials
67	Groupings of Anticipated Programmatic Needs
68	Donors Personal Acknowledgement
69	In-Kind Planning
80	Global Development Model
83	Global Movement Communications Network
114	Lens Course Pitch

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Recommendation #8
FOSTER MOVEMENT SOPHISTICATION

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Recom- menda- tion #	Recommendation
23	Cultivation of the EI Image
39	Civic and Ecclesiastical Endorsements
40	Imaginal Global Story
46	Design Global Image Decor
50	High Quality Imaginal Calling Documents under Secular Names
52	Alternate Secular Name
56	Contact Nurture Program for Corporation, Foundations, Government and Related AGencies
62	Comprehensive Constructs and Story
81	Embrace the Indigenous Language and Culture
96	Guardians Develop Contacts with Service Clubs
107	Names Protected from Unauthorized Use
108	Separate Divisions within the Institute
115	Publication Policy Guidelines
126	Basics Tools and Instruments for Secular Consults
113	Listing of Key Groups with In-Service Programs

Recom- menda- tion #	Recommendation
70	Systematized Overseas Employment Opportunities
77	Employment with Multi-National Firms
90	Visa Entry Information Gathering
91	Lists of Critical Job Categories
92	Permitted Activities Under Visa
93	Overseas Employment Data Bank
94	List of Contacts to Foster Overseas Employment
98	Data Centrum Regarding Employment Possibilities, Expertise, and Travel
99	Procure Travel Documents for Employment Abroad
109	Legal Domiciling
116	Global Employment Agency

Contradiction:

Narrow based, short term development limits possibility of long term sources.

Thrust:

Moving development toward new emphasis on major long range and broad based giving.

Prime activities:

1. Direct solicitation of in-kind, corporations, and personal contacts.
2. Strategic projection PSU on long range development needs formulating movement budget projections.
3. Local implementation of development operations working within practicums and established order followup.
4. Formulate global net for development in Guardian Council, bringing commonness to regional development coordinating patron base and doing data gathering.
5. Create human resource index of movement colleagues skills by means of surveys and use of computerized data bank.
6. Clearing post at Centrum for coordinating and transmitting data on human resources.
7. Fiscal evaluation of long-range planning, expenditures, and funding operations.
8. Fiscal operations to examine priorities, guidelines, and management policies.
9. Image enhancement through brochures, published articles, and public contacts.
10. Information system for service clubs, speakers bureau, and regular reporting.

Contradiction:

Existing structure and vision of Guardians' role is too limited in scope to utilize the full Guardian resources

Thrust:

Design roles that use consultative expertise and socio-economic position of Guardians.

Prime Activities:

1. Consultant Assignment. To establish an assignment list of consults and speakers bureau engagements.
2. Lens Recruitment. To take responsibility for LENS course recruitment and course set up.
3. Guardian Net. Formulate rationale for utilizing their personal and business contacts and build a local Guardian net.
4. Global Odyssey. Establish a Guardian Centrum to coordinate their participation within Global Odyssey.
5. Sojourner Sabbatical. Create sabattical programs for using Guardian skills, Phase IV services, special skills.
6. Guardian Travel. Utilize Guardian travel for movement of supplies and services.
7. Wayside Inn. Make available RH guest rooms for Guardians traveling as paying guests.

Contradiction:

Current real estate management procedures are based on past images which do not reflect the complexity of holdings or anticipated acquisitions.

Thrust:

Bring movement expertise to bear on real estate management procedures.

Prime Activities:

1. Holdings analysis. Compile data on holdings via religious house questionnaire.
2. Data bank. Centrum file on real estate holdings.
3. Reporting scheme. Annual report on holdings picture.
4. Consultants list. Skills abstract of guardians and colleagues.
5. Legal Net. Metro/regional lawyer and accountant guild.
6. Business centrum. Liason with region for coordination and projection.
7. Acquisition criterion. Operation cost analysis of lease, rent, gift, buy.
8. Property management. Analyse investment returns and disposition criterion.
9. Goals definition. Ecumenical parish locations, future nodes.
10. Ownership schemes. Order incorporation and patron ownership opportunities.

Contradiction:

Current investment schemes do not further the Order's financial power

Thrust:

Bring Movement expertise especially in insurance and investment to bear on Order funds.

Prime Activities:

1. Create investment board of Order and movement to determine policy in relation to risk and growth, and to review investments periodically.
2. Integrate Order insurance policies
3. Investigate self-insuring and high deductible insurance
4. Establish liability limits policy relative to PH, EI property insurance
5. Investigate incorporating US and globally PH's to take advantage of tax umbrellas
6. Investigate income tax advantages of incorporating
7. Investigate contract employment by EI relative to income tax umbrella
8. Research Order youth actuarials including anticipated youth growth in numbers and update regularly relative to Education Fund.
9. Computerize accounting of EI, Order accounts using independent consultants when feasible.
10. Research depository(s) of global Order funds to maximize flexibility and minimize exchange losses.

Contradiction:

Present employment and visa possibilities limit the global use of troops

Thrust

Creating a stable yet versatile financial and legal base for global deployment.

Prime Activities:

1. Overseas Employment. Create a data bank with the capability of matching overseas employment opportunities with special job skills of movement personnel. Movement and Order personnel establish employment in firms that offer international mobility.
2. Overseas Services. Develop overseas services such as a cultural orientation course, practical cross-cultural research, and instruction in English.
3. Marketing Handicrafts. Initiate a model for marketing overseas handicraft produce, arranging wholesale outlets, buying and financing, for the support of community development.
4. Visa Files. Create comprehensive files of visa options, requirements, and restrictions, related to the citizenship and employment of movement personnel.
5. International Cultivation. Guardians develop new overseas entry and employment possibilities by intensive cultivation of indigenous leadership and international business associates.
6. Paper Corporation. Create one or a series of corporations on paper to provide special global employment, visa entry, and financial support for overseas houses.
7. Global Care. Create a globally applicable model for Order care, including insurance, child guardianship, etc.

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TACTICAL THRUST SWIRL

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Tactical Thrust #	Tactical Thrust	Source Tactical Arena #
1	GUARDIANS ROLE OF EXPERTISE	9, 24, 25 26, 27, 38
2	SHIFT IN CARE FOR PUBLIC IMAGE	7, 8, 9, 35 37, 39, 40
3	ESTABLISH REGIONAL DEVELOPMENT FORCES	32, 33, 34, 40
4	COORDINATE GRASSROOTS, MAJOR, IK DEVELOPMENT	36, 40, 42
5	ENABLING OVERSEAS SUPPORT	21, 43, 44, 45, 46, 47
6	GUARDIAN SABBATICAL (INTERN)	20
7	GUARDIAN TRAINING SYSTEM	20, 22, 23
8	ENTRE TO ESTABLISHMENT	41, 46
9	PROPERTY ACQUISITION RE: DISPOSITION PLANNING	1, 2, 3, 4
10	PROPERTY MANAGEMENT	4, 5, 6, 24
11	UTILIZING ORDER RE: EI FUNDS	9, 12, 13, 14 15, 16, 17 29, 30, 31
12	USE MISSION TO ENGAGE GUARDIAN IN RESEARCH	19, 20
13	PARTICIPATE IN FIELD TO RESEARCH GUILD	22, 35, 46
14	LEGAL STRUCTURE RE: FUTURE MISSION	4, 9, 18, 47
15	PROFIT MAKING ACTIVITY: WINE PRESS	10, 11

TACTICAL THRUST # 1

SOURCE TACTICAL ARENA #'s 9,24,25,26,27,38

GUARDIAN POOL OF EXPERTISE. Since the guardians come from all walks of life, they corporately form a pool of knowledge in almost every field of every expertise. This expertise can be used by the movement and the order on a consultative basis for model building and problem solving. Another possibility discussed was for several guardians to arrange their business so that one or more could be freed on a short term basis (3 - 12 months) for global assignment while the business was maintained in their absence. In this way, their expertise would ease entry into a country and assure employment once there. This would enable a firm financial base to be maintained while freeing others for penetration and formulation. Thru the use of questionnaires, data pertaining to expertise outside of their vocational area, i.e. language, pilots, etc., can be obtained and maintained in a computerized data bank. Other data such as contacts, professional, service, and social clubs, area and frequency of travel, etc. could also be gathered. Examples of this are:

1. Legal services such as incorporation, tax law interpretations, etc.
2. Property acquisition, disposition, and management.
3. Participation in continental, area and regional PSU's and workshops
4. Utilizing business trips to enable pedagogical and formulation assignments.
5. Establish and maintain a data bank.

- *INVESTMENT WORKSHOP*

- *GLOBAL R.H. VISITS BY STEWART STOWELL ETC.
(CHECK GLOBAL ORDER REPORT FOR DATA)*

TACTICAL THRUST # 2

SOURCE TACTICAL ARENA #'s 7,8,9,35,37,39,40

SHIFT IN CARE FOR PUBLIC IMAGE. The shift in what it means to care for the movement's image as implied in the Guardian recommendations is in the direction of a more self-conscious total thrust, in the sense that everything we do that is visible or effects the public however indirectly, is a part of the impact we make and will effect whatever response is elicited. In the business dimension, possible new tactical arenas include soliciting research contracts, setting up and strategically locating tutoring schools, soliciting research contracts for special consultant work, and researching the market for auxiliary services. All promotional materials would be written in the context of the total public relations thrust. Guardians will participate in PSU's on the E.I. and movement image, and use the recommendations from the Fall '72 meeting to begin to create the Guardians role in public relations. Through Regional and Metro Development Coordinators comprehensive public images will be adapted to local situations, such as regional council decor, with common adaption guidelines. Other tactics in this thrust will include sophisticated, imaginal brochures, slide presentations, cassette tapes, demonstration project films and photo displays and articles on resurgence. Guardians will also be concerned with developing long range sustaining stories for such relationships as patrons, in-kind development sources and major funding proposal models. As a part of this concern they will consider various perspectives for stories, and current social and business trends which effect movement concerns.

Elements:

The Guardians will participate in PSU's to research and develop the comprehensive story which will freight the image shift called forth by the turn to the world and rapid global expansion.

A set of sophisticated public relations tools, including films, tapes, and printed materials are needed, to be transported and/or distributed world wide.

Context and guidelines are needed for the local use and adaptation of those tools.

Exploration of business possibilities for marketable movement goods and services calls for the creation of an intentional, missional "advertising" approach for promotion of such items.

Long range stories and strategies are to be developed for sustaining key relationships such as patrons, and important in-kind sources.

TACTICAL THRUST # 3

SOURCE TACTICAL ARENA #'s 32,33,34,40

ESTABLISH REGIONAL DEVELOPMENT FORCES. The development centrum guild will take responsibility for the establishment of regional development forces. To do this it will be necessary to have long range projections of development needs and to design a development system which consists of a global development network with clearly articulated local operations procedures. The long-range projection sets the contextual indicative out of which men can decide to do development in a region. The development system design will organize itself in three source areas: regional development, major financial gifts and inkind gifts. It will be the level at which planning and implementation begins. The global development network is the framework in which the development forces work for coordination, training, and data interchange of the system. Finally, every local man in implementing development operations in his region will be engaged in creating and using tools and acts as well as being trained as he is training others, all this in the midst of actualizing development tactics.

1. Research development futures -- a PSU with guardians to develop a four-year global budget and to identify monetary and inkind sources to cover the budget.
2. Coordinate regional development activity with penetration and formulation at the metro level to build comprehensive missional goals for the metro.
3. Create regional development nucleus around the guardians for grassroots, inkind and major funding, with accountability system built in.
4. Train for local actualization -- utilize the practicum construct for training guardians and regional developers in all development arenas (grassroots, major funding, inkind etc.)
5. Actualize the regional development network through calling, follow-up, story creation and rehearsal and data interchange to maximize the return.

TACTICAL THRUST # 4

SOURCE TACTICAL ARENA #'s 36, 42

COORDINATING FINANCIAL SUPPORT THROUGH SOURCES DIRECTLY ACCESSIBLE TO THE GUARDIANS. Financial support for the movement other than outright contributions can be obtained through guardian resources and contacts. In general access to major sources of money requires the financial prowess and finesse represented by the guardian financiers. In instances where money or goods are held in trust funds it is possible to have the interest given to the Ecumenical Institute as a tax break for the fund's beneficiaries. Moreover, by lending their endorsements and financial backing the guardians can guarantee and secure large sums of money to be used for movement programs.

1. Money or goods can be solicited through bequests in wills, annuities and living trusts.
2. Interest free money placed with the Institute can be reinvested in blue chip stocks or savings accounts.
3. Low interest loans can be arranged through guardian buying power and then reinvested.
4. Patron gifts can be solicited from friends and business acquaintances.
5. High level contacts can obtain foundation funding for demonstration projects and international courses.

TACTICAL THRUST # 5

SOURCE TACTICAL ARENA #'s 21,43,44,45,46,47

ENABLING OVERSEAS SUPPORT. Guardians have several ways to enable overseas support of religious houses. Using their contacts, influence and experience, they can enable employment of colleagues assigned to overseas religious houses. In addition, when they themselves are overseas, they can stay at religious houses instead of hotels and pay according to the image of the Wayside Inn. Finally, with the knowledge of customs and visa requirements of various countries, the guardians could facilitate the travel and effectiveness of overseas colleagues.

1. Enable employment -- contacts.
2. Enable travel of colleagues -- knowledge of visas.
3. Contribute directly to overseas religious houses -- wayside inn.
4. Enable cultural effectiveness -- customs.
5. Enable employment -- references, influence.

TACTICAL THRUST # 6SOURCE TACTICAL ARENA #'s 20

GUARDIAN SABBATICAL. The form of the guardian relationship to the order that provides him with nurture in the common life of the order as well as intensive training in the religious is the guardian sabbatical. This would be a unique role in the movement in that the guardian on sabbatical would be neither a regional colleague nor a symbolic order member, although he would at times wear both hats. This may be moving in the direction of forming the external order and would resemble present intern training.

1. One year at a religious house.
2. One year at centrum assigned to post.
3. Global research trip.
4. Global penetration trip of recruitment, teaching and formulation.
5. Assignment to a demonstration project.

TACTICAL THRUST # 7

SOURCE TACTICAL ARENA #'s 20,22,23

GUARDIAN TRAINING SYSTEM. The Guardian Training System is out to create the religious in the midst of the secular. Through spirit and practical methods training, the Guardian recreates his self story as one living for the world on behalf of his neighbor. He grounds everyday experiences in the deeps. The Training System holds the Guardian before the Word, it focuses and intensifies the use of his particular gifts or situation. This means using his contacts with the business and professional world to assist in recruitment, development, and nurture. Guardian Training may include teaching in the Lens course, going on global trips or participating in PSU's.

1. Speaking engagements
2. Recruitment for Lens
3. Development pitches
4. Consults
5. Contacts with business, educational and social service agencies

TACTICAL THRUST # 8

SOURCE TACTICAL ARENA #'s 41, 46

ENTRE TO ESTABLISHMENT. This tactical thrust is to bring intentionality, both in North America and the other eight continents, in the use of guardian personal contacts, service club affiliations, business connections, government contacts and travel exposure for movement permeation and development, and to collect and classify other key contact potentials for future cultivation of new opportunities for financial clout and support.

1. Cultivate key leadership from other countries.
2. Establish network of guardians with international business and government contacts.
3. Engage in local service club and social circles for developing funds and cultivating possible donors.
4. Become aware of business associates who belong to influential groups and create battleplan for strategic personal calling and participation in local functions.
5. Encourage key persons within social groups to use their influence for sponsorship or development -- recruitment to Lens or RS-I may be prime motivating factor in this area.

TACTICAL THRUST # 9

SOURCE TACTICAL ARENA #'s 1,2,3,4

PROPERTY ACQUISITION AND DISPOSITION PLANNING. There is an increasing demand for procuring, effectively operating and disposing of global properties, therefore expertise from movement guardians is needed to compete in the arena of finance and business. Effective record keeping and updating systems will be important to future projections, especially order memory relative to the acquisition of religious houses and base property. The guardian expertise and gifts can be used most creatively by the movement through the use of a comprehensive resource list of each guardians' possibilities. PSU's in the arenas of future projection, development, management and order relations will be needed to utilize available skills which will in turn enable global property acquisition and disposition planning. Finally, there is need for preliminary gridding and data gathering relative to real estate which will result in a practical real estate model and a comprehensive timeline.

1. It is recommended that religious house property be leased whenever possible, especially for the first year, with an eye always open for a "gift" or in-kind house.
2. It is recommended that a patron ownership structure be formulated.
3. It is recommended that the possibility of obtaining the Lakeside property via a land contract be investigated, as well as the FHA refinancing of the property.
4. It is recommended that there be an investigation of financing deficits through movement bonds and notes held by movement members.
5. It is recommended that a real estate grid of Uptown be created and related to existing zoning regulations to the intended demonstration project.

TACTICAL THRUST # 10SOURCE TACTICAL ARENA #'s 4, 5, 6, 24

PROPERTY MANAGEMENT. The tactical thrust of property management will spell out the existing values used in the management of properties with missional effectiveness and evaluate them to anticipate the growing complexity that is coming with Religious House expansion and 5th City reduplication. It will also discern ways of drawing the expertise of the Guardians and Phase IV colleagues to form a management and administrative task force that will maximize the missional effectiveness of the present management structures.

1. Present management systems be written up with values being held objectified.
2. Guardians be consulted on evaluation and revision of management structures.
3. Sojourn, intern program for elders be initiated for elders who could reside at Lakeside.
4. Principles of missional effectiveness in property management be established.
5. Possibilities of obtaining and maintaining a Continental transportation fleet with concrete options pro and con spelled out.

TACTICAL THRUST # 11SOURCE TACTICAL ARENA #'s 9,12,13,14,15,16,17,29,30,31

UTILIZING ORDER RE: EI FUNDS. Utilization of funds of the Ecumenical Institute and the symbolic order needs to be both comprehensive and revolutionary in scope in order to enable the maximum missional possibilities, and also provide a sign of what can be done to cut across the economic tyranny experienced by corporate groups in the 20th Century world. At this point, the primary block to defining fiscal actions in a number of crucial financial arenas is a clearly stated fiscal policy for both the order and the EI that is intimately linked to the revolutionary operating principles we must honor if our task is to succeed. As a beginning toward defining these policies, comprehensive research into the means of reducing expenditures and maximizing investment return is needed in order that the possible avenues of operation can be exposed to the broader questions of basic policy. Guardians knowledgeable in such areas as investment, insurance and tax structures can bring these arenas of concern into clear focus through research which pulls this information into usable forms. Reports on this work will enable a group of Guardians and order members to forge out the comprehensive fiscal policies for both the EI and symbolic order, which would include the underlying revolutionary principles that must be considered in missional financial operations and the guidelines to various funds. This group will then submit these recommendations on the broad fiscal policies for modifications and consensus adoption by the total body.

1. Build structures to actualize a carefully researched integrated investment system in order to maximize protection and growth of order and EI funds.
2. Research possibilities of utilizing insurance to maximize care of order needs at minimum expenditure.
3. Investigate short and long term benefits to order and EI derivable from current and projected tax structures.
4. Articulate basic fiscal policy regarding order and EI financial operations that reflect sound management and revolutionary thrust.
5. Identify the arenas of possibility for effective fiscal operation, prioritize their actualization, and create structures for evaluation their status.

TACTICAL THRUST # 12

SOURCE TACTICAL ARENA #'s 19, 20

USE MISSION TO ENGAGE GUARDIAN IN RESEARCH. An invisible network of structures, methods, and human resources are in being in the region, operating as a "net of care" so that guardians always have available the support, guidance, and wisdom of the Symbolic Order; while, in turn, the Symbolic has available the support, influence, and expertise of the Guardians. In other words, the support system is a two-way street. It provides methodologies and structures that enable the guardian to turn matter into spirit in every situation and thereby finding meaning in every situation, giving secular man a chance to significantly engage as mission wherever he is. It builds the context for on-going development to occur so that development serves as an effective formulation dynamic in the region. Most important, the guardian--in actuality--becomes part of the support system as he becomes a vital part of the movemental machinery. The movement structures and activities call for his skills, wisdom, and sensitivity to the establishment. He is the accountability that breathes raw data, practical expertise, and sophisticated style into the system, thereby keeping it honest to the needs of local man.

5 elements:

1. The Regional Practicums create a permission-giving context for on-going develop to take place in the region.
2. Finance PSU provides opportunity for models to be built on the local level to deal with financial contradictions.
3. Religious House can be tapped for speakers and resources at development meeting.
4. Workshops in style enable guardians and the members of the symbolic order to bring intentionality and sophistication to their style of life.
5. The secular solitary provides the avenue for establishing self-consciousness about the guardian as a man who continually meditates, contemplates, and prays.

TACTICAL THRUST # 13

SOURCE TACTICAL ARENA #'s 22,35,46

PARTICIPATION IN THE GUILD DYNAMIC. The Fourth Guardians' Consult has been named by some as the first meeting of the Guild. Without specifically naming it, the Guardians have asked to participate in the guild dynamic by specifying the arenas in which they are willing to engage as the Movement in joining with secular society in shaping community structures.

1. With the help in planning and arranging by the Religious House, the Guardians will participate in speaking engagements in the community about the Movement to develop credibility.
2. The Guardians will become an integral part of the forces participating in the preaching mission.
3. In the turn to areal and regional fund raising, the Guardians will become the liaison between the Institute and the corporations and foundations in their community or within their acquaintance range.
4. In the expansion of the inkind experiment, the Guardians will keep abreast of the current and long-range needs, such as, Kemper renovation materials, Summer '73 supplies and other ongoing needs, and will assist in making initial contacts with suppliers for contributions.
5. In order to effectively permeate the business community and create necessary income for the religious houses, the Guardians through their local contacts, will assist in creating an employment net, both on the continent and overseas.

TACTICAL THRUST # 14

SOURCE TACTICAL ARENA #'s 4,9,18,47

LEGAL STRUCTURE RE: FUTURE VISIONING - As the work of the Movement and the order within the Movement become more complex, the Movement will have at its disposal legal council which will act as an advisory board. This board will (by virtue of its movemental status) participate in long range planning and visioning to anticipate the trends in tax sheltering, capital gains flow, paper holding corporations, real estate disposition, antitrust suits. In addition, international laws need to be interpreted in regards to travel, paper holding companies, customs and currency exchange. The necessity of setting up a central filing system to hold all legal documents of the Movement and order's business negotiations. Attorneys and accountants that could participate as counselors or in the advisory capacity should be registered by area.

1. Self-conscious creation of legal resource pool that functions, in advisory and counseling capacities to both the Board of Directors and the Panchayet.
2. Identify special skills immediately needed: an international council, tax consultants, IRS liaison, lawyers who have retainers with major corporations, specialists in institutional law proceedings.
3. Create liaison with establishment legal entities to anticipate incorporation procedures and establish a base point for tax shelter.
4. To create paper holding companies overseas, expedite currency exchange and establish legal base and complimentary relations with internationally based companies, for the purpose of obtaining blanket visas and skill related jobs.
5. To provide a visioning and to anticipate trends in federal funding and corporation funding and provide abstracts and data concerning future legal courses to pursue.

TACTICAL THRUST # 15

SOURCE TACTICAL ARENA #'s 10,11

PROFIT MAKING ACTIVITY: WINE PRESS. In the past, religious organization and religious orders in particular have discovered the usefulness of revenue employment within the jurisdiction of the order. These money-raising activities range from the selling of souvenirs in St. Peter's square to the bottling of wine in a monastery, and are often referred to as "wine press" activities. Their usefulness is based on gaining revenue by exploiting possibilities already "given" in the decided mission. As examples of this principle: 1) The activities often incorporate the use of order personnel (thus enabling interchange of troops without employer hassle); 2) the use of a skill or business to gain entrance to a geographic (or political, etc) area; 3) capitalizing on the richness of a locale to birth resources for the church and/or community, and 4) as a demonstration of the mission of the order. "Winepress" operations enable the order to free itself from economic tyranny by putting the order itself in control of employment, income flow, and more free mobility of its members.

- 6 Global Real Estate Guild.
- 8 Guardians Pool in relation to Management Expertise.
- 9 Consultation and Enablement Skills in relation to Property.
- 11 Investment policy Board in relation to investment management.
- 18 Directory of movement Guardians in relation to investment opportunities.
- 21 Symbolic Centrum Business division.
- 27 "Office of Vision and Response" in relation to 5 year Fiscal plan.
- 28-1 Task force of Guardians in relation to Movement Data Bank.
- 32 Regional Development Coordinators.
- 35 Metro Development Coordinators
- 40-1 Speakers bureau in relation to local man's image of the movement.
- 55 Metro Capital Fund task forces in relation to data on local organizations.
- 127-3 Team of Guardians for each area in relation to assignments to consults.

- 1-3 PROPERTY ACQUISITION SYSTEM: Define relationship of future projection, development, management and Order strategies relative to property Acquisition and facilities operations.

- 2-1 PROPERTY ACQUISITION MANUAL: Design format of a manual of property acquisition criteria, issues and possibilities. Some issues are local ordinances, tax shelters and real estate financing. By present movement Guardians.

- 21-1 BUSINESS DIVISION TASKS: Build a functional task model delineating the various jobs of a Business Division at Symbolic Centrum which would encompass such posts as Development, Investment Portfolio, Accounting, Data Processing, Regional Fiscal Coordination and Movement Skill and Product marketing. By expert Guardians and appropriate Order Staff.

- 22-1 DEVELOPMENT COORDINATION: Comprehensive plan for integrating development efforts. By Guardians and appropriate Order staff.

- 23-3 E.I. PUBLIC IMAGE: The Public Image of the Ecumenical Institute. By Movement Guardians.

- 28-2 HUMAN RESOURCES BANK: Research operation methods of a human resources data bank containing names, special skills and contacts of colleagues. Investigate sources of computer facilities as in kind donations, and establish computer program specifications.

- 29-1 GUARDIAN SABBATICAL PROGRAM: Establish guidelines for a guardian sabbatical program to give business persons and professionals and spouses the opportunity to intern or sojourn.

- 30-1 REVOLUTIONARY FISCAL PRINCIPLES: Outline revolutionary fiscal principals. By guardians and order members.

- 61-1 KEMPER RENOVATION IN KIND: Locate the sources and forces for in kind contributions to the Kemper renovation. By Guardians at regional level.

- 69-1 IN KIND HANDLING MODEL: Create a model for the transportation and storage of large or perishable in kind gifts.

- 67-1 FUTURE INKIND REQUIREMENTS: Forecast programatic needs of every area of the globe for use in inkind solicitation. Forecast programs, itemize specific needs, and write up Summer '73 as sample proposal for immediate testing by using it with Guardians. By order centrum.

- 78-1 MARKET REFORMULATION METHODS: Identify agencies and organizations with whom Community reformulation methods could be marketed.

- 113-3 PRIORITIZE GROUPS/CONTACTS: Choose and prioritize secular groups to be impacted and individuals to be contacted by Guardians. Held in Areas by Guardians.
- 119-3 EVENT FEE GUIDELINES: Establish financial guideleines for regional secular permeation events such as LENS Course & Speakers Bureau Honorariums. By Chicago Guardians and centrum leadership.
- 118-3 SPEECH WRITING MANUAL: Prepare a manual describing how to develop art form conversations, minispeeches and secular religious greetings and closings.

- 9-3 Conduct real estate practicums regionally.
- 22-4 Use development practicums where appropriate to integrate development efforts.
- 25-1 Guardians, etc. meet to draw together data from practicums and
-2 other records in order to develop long range movement AIDE fiscal model.
- 30-2 Use regional practicum to develop lectures on Revolutionary fiscal Policy.
- 37-2 Year end victory celebration at regional council for pledge accountability and acknowledgement.
- 44-3 Quarterly guardian meeting for strategic penetration of social structures for initial patron contacts.
- 53-1 Areal guardian meeting for assuming responsibility for major funding.
- 55-3 Have metro capital fund task force contextual meeting to enlist movement support.
- 60-1 Guardians participate in development meetings.
- 61-0 Have regular in kind strategy sessions for guardians, regional Galactic and religious house colleagues beginning with Kemper needs.
- 80-2 Hold development practicums in field so that the guardians establish a global development model.
- 80-4 Hold practicum follow-up.

- 1-1 RESOURCE LIST of movement people thin the regions who have wisdom relative to property for benefit of Property Centrum.
- 22-4 PROPERTY ACQUISITION QUESTIONNAIRE semi-annually to each Religious House re local ordinances, for updating the Property Acquisition Manual.
- 2-4 PROPERTY AQUISITION FORM to collect Order Memory on acquisition of Religious Houses and Base properties.
- 8-1 GUARDIAN TALENT SURVEY listing guardian gifts, talents and expertise.
- 23-2 PUBLIC IMAGE QUESTIONNAIRE for movement colleagues to determine present and needed E.I. Image in key areas where development and support is needed, i.e. denominations, business, government agencies, grads.
- 51-1 AREA DEVELOPMENT DATA: Collect data and stories for use by area developers.
- 70-2 OVERSEAS EMPLOYMENT QUESTIONNAIRE calling for employment information, business con~~t~~acts, skills requirements, s~~a~~laries, etc. besent to movement contacts in North America and regions overseas. (Also 116-1)
- 77-1 MULTI-NATIONAL FIRMS: locate positions with international mobility using questionnaire to Religious Houses, Guardians, RS-I Grads, and prospective industires (research survey).
- 93-1 OVERSEAS EMPLOYMENT DATA gathering from publications, agencies, corporations and personal contacts.
- 110-4 GLOBAL STYLE QUESTIONNAIRE to Odyssey and Global Trip returnees to determine socio-spirit and style issues as well as the characteristics of various cultural life styles.
- 113-1 IN-SERVICE PROGRAM GROUPS listed by LENS grads.

- 36-1 Training event in conjunction with regional practicum.
- 40-3 Color slide presentation of demonstration projects and global trips.
- 40-4 Film the 5th City demonstration project.
- 43 Workshop providing patron impact story and style.
- 71 Courses of instruction in English and other languages.
- 73 Course of instruction in Movement Research methodology.
- 74 Course of "cultural immersion."
- 81 Language and culture courses to beautify ugly Americans.
- 88 Course materials and teaching tools for cultural orientation.
- 110 Socio-spirit (Edge)/Style workshops.
- 112-1 LENS participation in relation to "desert nurture" model.
- 117-3 Three classical talks on resurgence.
- 128-2 LENS pedagogy and appropriate teaching schedule for Guardians.
- 124 Guardians trained as sophisticated consultants.
- 24 Weekend "Fiscal System" Seminars.
- 30 Revolutionary Fiscal principles as lecture series.

- 1-4 Gather, up date and organize the existing records on properties and operations.
- 3-1 Create a form for obtaining order memory on acquisition of
-2 religious house and base properties, esp. Kemper.
- 3-3 Create a list of currently or potentially available facilities that could be used by the movement.
- 4-2 Gather data on current ownership and tax status of the uptown ecumenical parish.
- 6-4 Periodically publish signal property acquisitions and anticipated needs.
- 7-2 Create operations and maintainance manuells on major equipment.
- 20-1 Compile central file of real estate holdings and supporting records.
- 23-4 Prepare imaginal annual fiscal reports and projections.
- 31-3 Regions supplies centrum with complete donor list.
- 34-1 Compile list of regional donors, date last called on and responce.
- 37-3 Set up regional card file of people who have pledged for accountability and pledge acknowledgment.
- 40-2 Develop and put on cassett Global story.
- 40-3 Create color slide presentationsof demonstration projects and global trips.
- 40-4 Create film on 5th City Demonstration project.
- 41-2 Create file of miracle stories on patron calls.
- 50-1,3 Create high quality, imaginal calling documents.
- 51-3 Store matrix of data and stories used by area developers.
- 57-2 Write an imaginal report on programs in progress.
- 58-1,5 Create an area data interchange newsletter for newly procured needs in fund raising.
- 61-2 Create a comprehensive Kemper renovation list to be secured by regions.
- 62-1 Have printed material telling story of global demonstration projects.
- 62-2 Compile list of gifts and donors in past years.
- 126-3 Design innovative borchures, pitches, advertisements.

- 63-1 Create necessary form for an inkind donor recruiting system; such as, calling reports, prospect analysis, timeline structures and follow-up.
- 65-1,5 Create and maintain a current inkind requirements file that includes present and projected needs for goods and services.
- 66-2 Obtain reference materials like Thomas Register, SIC codes, Industrial Association indexes, etc.
- 67-3 Write Summer '73 proposal as a sample proposal and test.
- 70-3 List of periodicals advertising overseas jobs.
- 71-4 List of people serving in tutoring capacity.
- 76-3 Obtain access/customer/pitch/brochures.
- 80-1 Donors manual.
- 83-4 Utilize micro-film techniques for storage, retrieval and re-duplication of data.
- 92-1 Gather and store in useable form, restrictions on activities imposed by visas.
- 93-3 Index data on order and extended order on occupational experience and expertise.
- 94-1 Acquire copies of publication "Educational Opportunities Abroad."
- 97-3 List of Guardian availability and capability.
- 98-2 File at Base of employment opportunities in 8 continents.
- 98-3 Guardians submit journals, etc. of overseas employment opportunities.
- 108-1 Printed material to show relationship to Institute of Cultural Affairs rather than E.I.
- 115-3 Manual for guidelines, policies and suggested publication outlets.
- 117-3 Develop materials for well known speakers.
- 118-1 Develop manual for mini speeches, secular greetings..
- 122-3 Data file for houses reporting consultation needs.
- 122-4 Data file for keeping and disseminating deployment possibilities.
- 124-1 Visionary document on urgency of the times.
- 124-2 Handbook of crucial customs and laws.

TACTICAL ARENA

Order Property: Data and Dissemination

TACTICAL ARENA # 1

REC-TAGNE
NUMBER

TACTIC STATEMENT

1-1	Property Operations
1-4	Update Records
2-4	Religious House questionnaire update
3-1,2	Order Property Acquisition, Tactical Procedure History
16-1	Annual Property Report
6-3	Annual Operating Cost Analysis
20-1	Central File of Reas Estate Holding
104-2	Data on Leasing or
104-3	Gift House
3-4	Data dissemination System
6-4	Publish Acquisition list and needs

TACTICAL ARENA c Inventory Movemental Legal

TACTICAL ARENA # 2 Managerial Resources

REC-TACNE
NUMBER

TACTIC STATEMENT

1-2	Movement (people-region) Resource list
3-3	Current-Potential Facility listing
8-1	Guardian Skill Abstract
8-2	Patron Ownership Structure
20-4	Guardian lawyer Consul Net
105-1	Metro Lawyer/accountability list

TACTICAL ARENA _____ Facilities Procurement Model
TACTICAL ARENA # 3

REC-TACTIC
NUMBER

TACTIC STATEMENT

1-3

Order Real Estate

2-1

Property Acquisition Manual

2-2

2-3

5-1

Lakeside Property Investment

5-2

5-3

5-4

9-1

Facilities Procurement Model

9-2

9-3

9-4

104-1

Ownership by Individual or Ecumenical Tax Planning

TACTICAL ARENA

Legal Planning

TACTICAL ARENA #

4

REC-TACTIC
NUMBER

TACTIC STATEMENT

4-a

Parish Real Estate Grid

4-b

Current Ownership/Tax and Data

4-c

Zoning Regulation in Relationship to Project

10 b

Develop Tax Shelter Mechanism

104d

Maximum property Tax Exemption

104e

Tax deduction collaboration

105c

Legal Advice about Real Estate

TACTICAL ARENA

Maximize Property Effectiveness

TACTICAL ARENA # 5

REC-TACTIC
NUMBER

TACTIC STATEMENT

4d	Ecumenical Parish Property needs/criteria
6b	Property Acquisition Planning
8c	Global Insurance Plan
8d	Real Estate Tax Shelters
10a	Creating and Establishing
10c	Place of Legal Business
20b	Property Disposition Criteria
20c	Long-Term Property Maintenance
21d	Establish Allowable Costs (priority)

TACTICAL ARENA

Business Division: Organization & Task

TACTICAL ARENA # ⁶

REC-TAene
NUMBER

TACTIC STATEMENT

10d

Assign/Train Staff

21b

"Business Division" Guard Auxiliary

21c

Establish business Division (determine organization)

105b

Centralization for Metro Lawyers

21c

Business Division Task Model

TACTICAL ARENA

Public Relations

TACTICAL ARENA # 7REC-TACNE
NUMBER

TACTIC STATEMENT

71-1	Contact Groups/Individuals
71-2	Set Up P. R. Dept.
71-4c	Location of School (where tutoring takes place.)
71-4d	Market Survey
73-2e	Solicit Research Contracts
74-1b	Contact Agencies
76-2	Cost I.D. Translation Service
87-1	Research Market of Auxilliary Services
87-4	Identify and Contact Prospective customers
88-2	Country Priorities for Language Course
95-4	Contact Friendly Nat's about Business Practices

TACTICAL ARENA Promotional Materials
TACTICAL ARENA # 8

REC-TACNE
NUMBER

TACTIC STATEMENT

71-3	Write P.R. Story for Teaching English
76-3	Cost/Brochures/Pitches--Translating Service
78-2	Community Reformulation Proposal
79-2	Promotion Method
79-3	Market Contact for Odyssey
87-2	Examples of Movement Methods Applicability
87-3	Imaginal Communication

TACTICAL ARENA

Legal Support Systems

TACTICAL ARENA # 9

REC-TAENE
NUMBER

TACTIC STATEMENT

71-4a	Establish Legal Steps-English service
75-3	Locate Retail Outlets-----Import/Export
76-4	Operate Within Local Legal Frame
78-4	Protect materials (community reformulation models)
95-1	Create a "paper" company.
95-3	Visa/work Permit Research

REC-TACTIC
NUMBER

TACTIC STATEMENT

71-4b	List of Tutors
73-1	Manual of Marketing Guidelines
73-2a	Research Cadre
73-2c	Communications Network with Movement Research
74-1	Marketing Course-feasibility Study
74-2c	List of Course Personnel/Costs
75-1	Survey Available Local Handicraft Skills
75-2	Existing Market Structure
75-4	Importer Survey
76-1	Identify Resource Skill; e.g. Translators
78-1	PSU on Community Needs
85-1-4	Develop Materials and Services Directory Offered by Movement
88-1	Reasibility Study for Conversational Language Course
73-2b	Religious House Space/Time for Research
73-2d	Research Library

TACTICAL ARENA DEVELOP MONEY MAKING COURSES

TACTICAL ARENA # 11

REC-TACNO
NUMBER

TACTIC STATEMENT

74-2a-d

Develop Cutural Immersion Course

74-1

Local "Odyssey" Itineraries

88-3-4

Develop Cult Orientation and Conv. Lang. Course and
Manual

REC-TACTIC
NUMBER

TACTIC STATEMENT

13-1	Independent insurance consultants
14-3	Obtain actuarial research of education fund.
14-4	Periodic update of statistical data for educ. fund.
11-1/2	List of qualified mutual investment counsellors.
11-4	Board of directors to name investment board.
15-4	Periodic investment review.
12-4	Proposal of investment policy.

TACTICAL ARENA Research Insurance Investment

TACTICAL ARENA # 13

REC-TAC
NUMBER

TACTIC STATEMENT

13-2	Investigate savings from insurance deductibles.
13-3	Self-insured .
17-2	Computerized accounting service.
17-3	Establish appropriate accounting procedures.
103-1	Investigate group insurance.
103-3	Compare policy premiums and coverage.

TACTICAL ARENA Actualize Integrated Investment
TACTICAL ARENA # 14 Systems

REC-TACTIC
NUMBER

TACTIC STATEMENT

13-4	Integrate insurance policies.
17-4	Assure personnel continuity.
15-3	Assign investment in relation to priorities.
86-4	Incorporate as non-profit corporation overseas.
102-4	Establish property tax exemption.
103-2	Establish minimum liability.

TACTICAL ARENA Articulate Investment Policies
TACTICAL ARENA # 15

REC-TACTIC
NUMBER

TACTIC STATEMENT

14-1	Operating presuppositions of Order youth education.
14-2	Anticipated growth of number of Order youth.
17-1	Define accounting controls.
11-3	Board of Directors defines and establishes guidelines of investments.
12-3	Order decides investment policy (of Order funds).
15-1	Delineate demands of Order and E.I. funds.
15-2	Establish risk/growth investment policy.
16-3	Support in-kind contribution with investment.
16-1	Establish policy for selection of investment.
100-2	Ecumenical Institute Board control all corporations.
100-3	Incorporate under common name, such as E.I.:OKC

TACTICAL ARENA Study recommended investments
TACTICAL ARENA # 16

REC-THEME
 NUMBER

TACTIC STATEMENT

- | | |
|-------|---|
| 16-3 | Establish high-interest loans to movement colleagues |
| 16-4 | Loans to local movement activities. |
| 102-3 | Assign Religious House mortgage in relation to personal income tax. |
| 102-5 | Maximize personal tax deduction via expenses. |

REC-TAene
NUMBER

TACTIC STATEMENT

12-1	Obtain legal advice from Guardians on legal structure.
86-1/3	Gather data on international non-profit corp.
86-2	Review data (86-1)
100-1	Review 86-1/3
101-2	Investigate U.S. tax laws in relation to Order.
101-3	Establish feasibility of legalizing Order.
102-1	Personal income tax research.
102-2	Ecumenical Institute as contract employer.

TACTICAL ARENA _____ ESTABLISH LEGAL CARE STRUCTURE FOR ORDER
TACTICAL ARENA # 18

REC-TACTIC
NUMBER

TACTIC STATEMENT

106-1	Create Model for Care of Order Children Guardianship
106-2	Legal Documents re: 106-] (Guardianship)
106-4	Create Model Will For Order Members

REC-TACNE
NUMBER

TACTIC STATEMENT

82c	Hold Practicum to Context Secular Man for Development
30a	PSU of Finance with Guardians and Order
30b	Regional Practicum for Lecture Building Training
110a	Socio-spirit workshop Relating Life Style to Sens. Social Issues
110b	Group Contains Guardians as Related to "4"
111a	A Regional Workshop S'73, Secular Import Schemes.
112d	Gather Wisdom on Secular Solitary
111b	Tap Religious House Force for Popular Preaching
121c	Chart of consultation.

TACTICAL ARENA

On-Going Zeal

TACTICAL ARENA # 20

REC-TACTIC
NUMBER

TACTIC STATEMENT

30c

Maintain vision.

112c

Initiate Areal Organization of guardians.

121b

Review and Evaluate R. H. goals by Guardians

124c

Guardian Create Timeline for consultant Training

124d

Procedures for Briefing Pre-consult and Post Consult Evaluation

128a

Lens Prep. Model Developed by Guardian council

128b

Lens Pedagogy for Guardians in Area

118a

Development manual for Handling Special Situations for doing Art forms and other Special Engagement.

118b

Guardians from Academy well versed in Art Form Method

118c

Hold PSU's for Manual Writing and Testing

82d

Nurture in Common Life of Movement

TACTICAL ARENA

Guardian Odyssey: Global Consult

TACTICAL ARENA # 21

REC-TAENE
NUMBER

TACTIC STATEMENT

110c	100 Guardians on global Odyssey
110d	Evaluation Screening of Global Odyssey
121d	Global Trip consultation
124a	Creation of Document on Times
89b	Enlist Host Country Nationals to Teach in their Language.
89c	Have Host Country Nationals introduce Movement to their friends
129a	Guardian Centrum priorities and Coordinate Odysseys with Consult Schedules
129b	Enable recent Lens Grads to Participate in Coordination of Odysseys
129c	Models Created by Area to Recruit and Assign key Guardians
129d	Teams and Units Assigned by Arena of Need

REC-TACTIC
NUMBER

TACTIC STATEMENT

111-c	Build Practical Implementation Model for Popular Preaching
111-c	Have Religious House Implement Model for Popular Preaching
121-a	PSU by Religious House--1 year; Timeline to Deal with Contradictions
117-a	Prepare List of Guardians to do Speaking Engagements
117-b	Prepare List of Speakers who should get Movement Documents
117-c	Develop Materials for Hand-outs

REC-TACTIC
NUMBER

TACTIC STATEMENT

112	Guardians Gather Data about Participants at LENS Course
112-b	Guardians Assigned to Gather Data on Potential Guardians
128-c	Enlistment Pitch and Model for Key Organizations in Course in Key Locations
128-d	Follow-up Model to Locate and Contact Lay Organizations to Recruit LENS
117-d	Develop Recruitment Model to be Implemented 3 Months After Talks
118-d	Recruit New Guardians and Nurture experienced Guardians
82-a	Establish contacts with Service Organizations, Churches and Educational Institutions
82-b	Training and Movement Courses and ITI
89-a	Recruit Host Country Nationals from Technical Schools and Training Courses
89-d	Have US Families Host Visitors from Other Countries and Encourage their Cultural Participation

TACTICAL ARENA SERVICE PROMOTION

TACTICAL ARENA # 24

REC-TACNE
NUMBER

TACTIC STATEMENT

7-1	Professional maintainance on equipment
7-4	Seek in-kind services for maintainance and operation of equipment
7-3	Recruit with brochure phase IV personell
28-1	Task force 5 guardians establish data bank of mov't friends skills and political-social contacts
29-2	promotional program for guardian sojourner sabbatical
29-3	focus initial exposure of sabbatical souourner to lens grads
29-5	Utilize background skills of guardians to mov't tasks
97-1	participate guardian meets make aware of needs for services

REC-TACNE
NUMBER

TACTIC STATEMENT

7-2	operation and maintainance manuals
123-1	to know how consult used see data bank
28-2	PSU obtain computer services for holding the data skill bank
28-4	initial survey of mov't resources to estimate automatic procedures
29-1	PSU to estimate guidelines for sojourner program guardian sabbatical
97-2	Guardians centrum to mediate needs to utilize skills
72-3	Cost model established and distributed across mov't
72-5	R.H. plan for maximization of sojourner wayside inn
72-6	Plan of services available
123-2	relay assignment through centrum
123-3	Centrum alert region of guardian arrival and services to be offered

TACTICAL ARENA DATA GATHERING
TACTICAL ARENA # 26

REC-TACTIC
 NUMBER

TACTIC STATEMENT

28-3	Data update and regulation procedures and output from mov't skill bank
28-5	Data transmission and output facilities to regional R.H.
97-3	Guardian Centrum keep list of skills and availability
72-2	Collect data-questionnaire from guardians for consult designs
120-4	Compile data questionnaire on IBM cards
122-1	A data centrum created for Guardian bank; estab. procedures review and pass on
125-4	Reevaluation of consult context
125	Revise consult checklist
29-4	Direct to sociological academies of 1990's; sabattical & sojourner
127-2	Design consult matrix for needs and guardian skill
127-4	Guidelines for speaker bureau drawn up and operating model and data guidelines for retrieval

TACTICAL ARENA

DATA USE AND FORMULATION

TACTICAL ARENA # 27

REC-TACTIC
NUMBER

TACTIC STATEMENT

72-1

Let mov't know stay at RH as paying in wayside inn

72-2

Encourage sojourner program for another continent during
missional discontinuity

72-4

Guardians spread word about the wayside inn

72-8

RH provide guest rooms decorated

TACTICAL ARENA

PROCEDURE FOR NEED/ RECRUITMENT

TACTICAL ARENA #

28

REC-TACNE
NUMBER

TACTIC STATEMENT

122_3	Establish procedures for RH to report needs and opportunities
122-4	Establish procedures for holding deployment opportunities
123-4	RH assess needs for consults and format of task for guardian
127-1	Select from RH Hosting model (123) the consult needs and organize their development
127-3	Team 6 guardians for 1/4 assignment of guardians

TACTICAL ARENA

Building Fiscal Evaluation Scheme

TACTICAL ARENA # 29

REC-TAENE
NUMBER

TACTIC STATEMENT

26a

40 Man Screen Build Fiscal Operations Translating Scheme

26b

Evaluate Existing Financial Principles Reflected in Present Data

26c

Build Operating Guidelines

84a

Global system Money Managers Training Program

84b

Operating Procedures for Global System of Money Managers

84d

System of Accounting for Money Managers

119a

Gather Data on Lens Course Fees

TACTICAL ARENA

Establish Fiscal Possibilities and

TACTICAL ARENA # 30

Priorities

REC-TACNE
NUMBER

TACTIC STATEMENT

24b

Time Line Seminars Relative to Area Priorities

26d

Time Line Expenditures

25b

Articulate Rationale for Funding Program

27a

Collection of Data of Fiscal Possibilities

84c

Identify Country, Area and Continent for Global Priorities

TACTICAL ARENA Fiscal Policy Operations

TACTICAL ARENA # 31

REC-TAGNE
NUMBER

TACTIC STATEMENT

24e	Assign Guardians for Fiscal System Seminars
25a	Assign Guardians to Catalyze Ground for Long Range Fiscal Plan
27b	Choose Composition of Vision and Response Office
119d	PSU Chicago Guardians to Establish Lens Charge and Honorarium Policy
24a,d,c	Develop Rationale for Week-end "Fiscal System" Seminars
27a	Guardian Board of Directors guard Fiscal Affairs of Mov't

TACTICAL ARENA Long Range Research & Coord. Devel. System
TACTICAL ARENA # 32

REC-TAC No NUMBER	TACTIC STATEMENT
22-1	Guardian PSU: Comprehensive Devel. Plan
22-2	Movement Groups submit 10 year Proj.
22-3	Eval. cost & income sources from globe to loc. to estab pres. direc
22-4	Use Regional Development Practicum tion
22-5	Use Delphi Method
31-1	Set 4 year Global Budget
33-1	Review Missional Model Re:Devel. to Mission
33-2	Determine Financial Requirement of Region etc.
33-3	Integrate devel into Missional goals.
33-4	Identify and Analyze sources of Revenues
34-1	compile List of Regional donors, date of last call and response
34-4	Coordinate Devel. with Penet. and Formul.
35-2	Arrange joint meeting of Devel Centrum and Metro Devel. coord.
35-3	Develop Regional Development Model.
44:1-4	Compile Directory of Socio-service
45:1-4	Coordinate with Other Development Plans
48-1	Locate Patrons
53-1	Area Guardian Meeting to set 1 year funding goals
61-1	Regional PSU on sources and forces for Kemper I.K.
65-1	Create Rept. syst. for Symb Cent. to notify Dev. Coord of current and Program I.K. needs.
65-4	Prioritize IK. needs from file.
66-1	Data on Guardian contacts ind/Occup/name
69:1-4	Additional IK. planning should be done.

TACTICAL ARENA Structuring and Assigning a Global
TACTICAL ARENA # 33 Devel Network

REC-TACNE NUMBER	TACTIC STATEMENT
31-2	Quarterly Printout to Regional Devel. Coord.
31-3	Region Supplies Centrum with Donor List
31-4	Rationale for Regional and Potential Donor Mailing
32-1	Brainstorm names for Regional Devel Coordinator
32-2	Consider Concerned Guardians for Coord.
32-3	Make colleague an Offer he can't refuse
32-4	Arrange nurture for Coordinator
34-2	Regional Deve. Corrd et al (implement)
34-4	Set I! Record System For Donor Calling
35-1	Assign Metor Devel Coord.
35-4	Present Development Model to Regional Council
37-1	Common accountability between Reg. Devel and Centrum
43:1-4	Story and Style workshop for Patron Callers on Reg/Metro/Local Quarterly
49-1	Get Nurture System for Patron on T/L.
49-2	Region Rev. Coord. Assumes Resp.
49-4	Coord. Nurture and Followup of Patrons with Base
53-2	Guardian Assigned to Gun Major Funding
55:1-4	Gather local data on Corp etc. and create task force
60-1	IK linked with Devel Pract.
60-4	Create Regional Devel. Nucleus for Guard Acct/Absol.
64-3	Match Regional Source and Forces with Kemper Renovation needs.
66-2	Ref. material for IK Reconnaiss.

REC-TACNE
NUMBER

TACTIC STATEMENT

34-3	Involve colleague in Training Events
34-4	Design Development Kit
36:1-4	Schedule Training Events in Conjunct with Rg. Pract.
37-2	Yr end victory celeb at Regional Council
37-3	Set up Regional Card File
38:1-4	Guardian meets with cadre to explain comprehensive Funding plan
42-4	Workshop to Adapt Miracle Stories
47:1-3	Design Global Catalog of Giving from Patrons
48-2	Contact model for Patron call
49-3	Keep Patron Informed
60-2	Model for Nurture of IK Prospects
61-4	Mobilize Kemper Rennovation by S'73 Blitz
65-2	Clean up IK files occasionally
66-3	Decide Key Compant to C-ntact for IK.
66-5	Generate Ongoing IK contects
68:1-4	Personal Acknowl. Model for donors
80-3	Network donor follow-up with data on file for all donors
80-4	Practicum Followup shared
114-1	Guardian Gives LENS Pitch

TACTICAL ARENA MANUFACTURING SUST. STORIES & RELATIONS
TACTICAL ARENA # 35

REC-TACTIC NUMBER	TACTIC STATEMENT
19:2	Kemper Story for Real Estate Gifts
41:1	Colleague Calls on Patron and Makes Record
41:2	Files Kept Locally
41:3	Copy Mailed to Base
41:4	Centrum Incorp. Stories in Newsletter to Coordinator
42:1	Research Data & Create Miracle Stories
42:2	Disseminate data to Regions
42:3	Establish Timeline for Data
48:3	Impact Patron
51:1-4	Stories from Every Perspective for Sample Proposal
53:2	Create Major Funding Proposal Document
54:1	Research Corp. stated arena of Giving in Charter & Public.
54:2	Glean Data from News Re: Stories
54:3	Discern Trends which Match our Concerns
54:4	Match Data in 54:1-3 with our Program
54:5	Interview Corporation Executives about Corporation Concerns
54:6	Key Phrases which Speak to Corporations Addressed
54:7	Key Contact/What Needed in Proposal
57:1-4	Stories Accounting for our Stewardship Donated Funds
58:1-5	Data Interchange on Major Funding Needs to Guardians
59:1-6	Evaluate & Interchange of Areal Strategy in Major Funding
60:3	Develop IK Prop. where Lacking Sources
61:2	Comprehensive Kemper Renovation List to be Secured by Reg.
64:1-4	Enumerate & Prioritize Recurring, Occasional, & 1-time Needs for IK

TACTICAL ARENA MANUFACT. SUST. STORIES & RELATIONS
TACTICAL ARENA # 35 CON'T

REC-TAENE
NUMBER

TACTIC STATEMENT

65:5

Regular Notification of Guaridans About Priority IK Needs

66:4

Guardian Aid in IK Contacts

67:1-4

Create IK Groupings to use in Proposal Form Re: S'73

REC-TAene
NUMBER

TACTIC STATEMENT

19-1	Solicit Bequest, Annuity, Living Trusts
19-3	Solicit Deposits-----Interest Donated
19-4	Utilize Borrowing Power (G)
80-1	Donor Manual With Gift Possibilities, Tax Exemp. and Available Matching Grants
48-4	Secure Gift from Patron

TACTICAL ARENA

PREPARE SOPHISTICATED IMAGINAL MATERIALS

TACTICAL ARENA # 37

REC-TACTIC
NUMBER

TACTIC STATEMENT

23-4	Imaginal Report
23-5	Sophisticated Brochure
40-2	Cassette-making with E.I. Story
40-3	Slide Presentation
40-4	5th City Film
46-1	Distribute Symbol
50-2	Photos of Demonstration Projects
50-3	Professional Design
62-1	Materials That Point To Global
115-4	Articles on REsurgence
126-3	Design Consultant Brochure
126-4	Professional Media Design
62-3	Miracle Stories on In-kind

TACTICAL ARENA

CREATE CONTACT INFO THROUGH-PUT

TACTICAL ARENA # 38

SYSTEM

REC-TACTIC
NUMBER

TACTIC STATEMENT

23-2	Build Questionnaire
39-1	List Leaders in Relation to Endorsements
39-4	Data Co-ordination with Penetration, Colleagues
56-3	Update Printout of Donors
62-2	List All Donors
62-5	Credentials for Callers
96-1	Identify Service Club Contacts
96-2	Local Service Club Contact Info.
96-3	Data Collection & Distribution of that Information
126-1	List Global Sponsors and Status
126-2	List Target Audiences
113-1,2	LENS Grad Contact Questionnaire

TACTICAL ARENA

MOVEMENT IMAGE PSU'S

TACTICAL ARENA #

39

REC-TAC No
NUMBER

TACTIC STATEMENT

23-3

PSU on EI Image

23-1

Use Fall '72 Guardian Recommendations

50-1

Research Materials on EI

81-1,2

Mov't. Language Course Choose Appropriate Apparel

113-3

Area Contacts List Prioritizing

REC-TACNE
NUMBER

TACTIC STATEMENT

23-6	Mov't Relations Guidelines
39-2	Regiona- Devleopment Co-ordinator
46-3	Local Modification of Symbols
46-4	Regional Council Decor
52	Alternate Name Use
62-4	Story Adaptation
107	Copyright of names (EI, ITI)
108-1,2	I.C.A. Materials where EI Name Not Usable
115-1,3	Manual on Policy for Articles

TACTICAL ARENA ESTABLISHMENT ACCESS THROUGH SERVICE
TACTICAL ARENA # 41 CLUBS

REC-TACTIC
 NUMBER

TACTIC STATEMENT

39-3	Recruit Key Leaders to LENS
40-1	Speaker's Bureau
81-4	Indigenous Social Involvement
81-3	Local Service Club Contacting
96-4	Local Guardians Contacting Service Clubs
96-4	Recruiting Service Club Personnel
113-4	Key Groups Contacted by Guardians

TACTICAL ARENA Regular Quarterly Reporting

TACTICAL ARENA # 42

REC-TACNE
NUMBER

TACTIC STATEMENT

56-1,2

Regular Reporting to Donors, Foundations

REC-TACTIC
NUMBER

TACTIC STATEMENT

70-1	Assess Overseas Job Market
70-2	Mvt. Overseas Job Contact
70-3	List of Overseas Job Periodicals
77-1,2	Locate Multi-Nat'l Firms
91-1,2,3	Oversea's Critical Job Categories
93-1,2,3	Job Data Information
94-1,2	Research International Employment
98-1	Employment Opportunities re: for Colleagues
98-2	Employment file
98-3	Employment Publications Gathered From Guardians
98-4	N.A.Guardians Research Empl. Agencies
116-1-4	Global Employment Opportunities

TACTICAL ARENA International Order Employment Placement
TACTICAL ARENA # 111

REC-TAene
NUMBER

TACTIC STATEMENT

70-4	Order Employment Skills List
70-5	Job And Skills Coordination
70-6	Order Employment Training Recommendations
77-3	Write Effective Resumes
93-3	Index Order Occupational Experience

TACTICAL ARENA

Consolidate Visa Information

TACTICAL ARENA #45

REC-TACNE
NUMBER

TACTIC STATEMENT

90-1-6

Visa Entry Information

92:1,2

Visa Restrictions Information

92-3

Visa Evaluation

TACTICAL ARENA

Guardian Develop International Clout
Clout

TACTICAL ARENA # 46

REC-TACNE
NUMBER

TACTIC STATEMENT

99-1

Guardian Employment Net

99-2

Guardians Cultivate Key Visiting Leadership

99-3

Intentional Contacts by Guardians Overseas

TACTICAL ARENA Create Global Legal Base

TACTICAL ARENA # 47

REC-TACTIC
NUMBER

TACTIC STATEMENT

99-4

Establish Business Overseas

109

Multi-National Incorporation of E.I.

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During the meals of the PSUs this spring quarter, we will work with the First Epistle of St. John, in order to intensify our encounter with Sanctification, to ground it in the objectivity of Scripture, and to expand our clarity on the methods of paraphrasing, annotation and commentary as tools for grasping the objective existential address of Scripture and other types of devotional reading. Pedagogically, you will need to keep the mood lively with a feel of experimentation. Rational and existential clarity on what John I is pointing to are crucial. *(NOTE: Paragraphs--P--are numbered as per divisions in The New English Bible.)

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FRI. EVE.	ASSIGNMENT: The very last thing in the evening, assign the group to write quick paraphrases on any one of the paragraphs for Saturday's breakfast conversation.
SAT. MORN.	WRITTEN PARAPHRASE: For this meal, read the assigned section of John I and have members of the group read their paraphrases. Then ask, "how would you say this this section to the Rotary Club?" The issue here is to allow the group to push its clarity on the passage through forcing John's address into everyday 20th Century language. Ask the group in closing what insights were revealed for them about the method of paraphrasing.
SAT. AFT.	ANNOTATION: During the lunch meal, read the assigned section of John I and ask what was least clear for people. Get out 3 or 4. Have different sections of the room take 5 minutes to write some annotation for those sections. This might include word demythologizing, explanation of the universe out of which the author was speaking and its transformation today, elucidation of any special references the author makes, etc. Have people read them. Ask what the whole section is about.
SAT. EVE.	COMMENTARY: For supper, read the assigned section and ask the group which is the capitol verse. Consense on one, and have everyone take 5 minutes to write what John might say if he expanded that verse to get out its implications for our day. Have people read some. Then ask for any further insights. In closing, inquire as to what happens to one in writing a commentary.
SUN. MORN.	ORAL PARAPHRASE: Simply read the assigned section and ask people to articulate how they might say the same thing to a plumber in the building, or to their colleagues at work. Ask what this section is about. Push for clarity.

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	Week 4	Week 5	Week 6	Week 7	Week 8
SAT. MORN.	P 1* 1: 1-4	P 6 2: 6-8	P10 & 11 2:20-25	P18 & 19 3:18-24	P25 5: 1-5
SAT. AFT.	P 2 1: 5-7	P 7 2: 9-14	P12 & 13 2:26-3:3	P20 4: 1-3	P26 5: 6-12
SAT. EVE.	P 3 1: 8-10	P 8 2:15-17	P14-16 3: 4-12	P21 & 22 4: 4-6	P27-29 5:13-17
SUN. MORN.	P4&5 2: 1-5	P 9 2:18-19	P17 3:13-17	P23 & 24 4: 7-21	P30-32 5:18-21

GUARDIAN FOLLOW-UP PSU
April 22, 1973

47 TACTICAL ARENAS UNDER 9 RECOMMENDATION ARENAS

SPRING QTR. 1973
Base Centrum

RECO MEN- DA TION ARENA	1	2	3	4	5	6	7	8	9
	MANAGE REAL ESTATE ACQUISITION	INCREASE INCOME POTENTIAL	HUSBANDRY OF ORDER FUNDS	NURTURE GUARDIAN FORMULATION	IMPLEMENT HUMAN RE- SOURCE INDEX	ANTICIPA- TORY FISCAL POLICY	BUILD DEVELOPMT NETWORK	FOSTER MOVEMENT SO- PHISTICATION	MANAGE GLOBAL IN- TERCHANGBLTY

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1 Order Prop erty Data & Disseminatn	7 Public Relations	12 Structure for Order Investments	19 Support System	24 Service Promotion	29 Building Fiscal Ev- altn Schem	32 Building Lng.Rnge Re srch/Doord Deval Sys	37 Prepare Sophisticatd Imag Materls	43 Internat. Employment Opportunity
2 Inventory Movemtl legl & Managerial Resources	8 Promotion Materials	13 Research Insurance Investment	20 Ongoing Zeal	25 Systems Formulation	30 Estab. FiscI Poss ibly & Priority	33 Structrg Design of Glob Devel. Network	38 Create Contact Thru-Put System	44 Internat. Order Employ Placement
3 Facilities Procurement Model	9 Legal Support Research	14 Actualze Integrated Investment System	21 Guardians Odyssey & Global Consult	26 Data Gathering	31 Fiscal Policy Operations	34 Implemtg Local Devel Operations	39 Movement Image PSU	45 Consoli- date Visa Information
4 Legal Planning (Tax Havens Ecumen Par)	10 Opera- tional Research	15 Artic- Investment Policy	23 Guardians as Popular Preachers	28 Data Use and Evaluation		35 Manufac- trng storis Sust. patr- onge Rels.	40 Local Image Adaptation Guidelines	46 Guardians Devel. Inter- national Clout
5 Maximizng Property Effective- ness	11 Develop. Money-Rais- ing Courses	16 Study Recommended Investments	23 Guardian Recruitment	28 Proce- dures for Need Pro- curement		36 Direct Solicita- tion	41 Estab. Access thru Service Club	47 Create Global Legal Base
6 Business Division Or- ganizatn & Task		17 Research on Tax Structure					42 Regular Quarterly Reporting	
		18 Estab Legal Stru- cture for Order						

Contradiction:

Narrow based, short term development limits possibility of long term sources.

Thrust:

Moving development toward new emphasis on major long range and broad based giving.

Prime activities:

1. Direct solicitation of in-kind, corporations, and personal contacts.
2. Strategic projection PSU on long range development needs formulating movement budget projections.
3. Local implementation of development operations working within practicums and established order followup.
4. Formulate global net for development in Guardian Council, bringing commonness to regional development coordinating patron base and doing data gathering.
5. Create human resource index of movement colleagues skills by means of surveys and use of computerized data bank.
6. Clearing post at Centrum for coordinating and transmitting data on human resources.
7. Fiscal evaluation of long-range planning, expenditures, and funding operations.
8. Fiscal operations to examine priorities, guidelines, and management policies.
9. Image enhancement through brochures, published articles, and public contacts.
10. Information system for service clubs, speakers bureau, and regular reporting.

GUARDIAN FOLLOW-UP
April 22, 1973

PRIME ACTIVITIES
II. GUARDIAN FORMULATION

SPRING QTR. 1973
Base Centrum

Contradiction:

Existing structure and vision of Guardians' role is too limited in scope to utilize the full Guardian resources

Thrust:

Design roles that use consultative expertize and socio-economic position of Guardians.

Prime Activities:

1. Consultant Assignment. To establish an assignment list of consults and speakers bureau engagements.
2. Lens Recruitment. To take responsibility for LENS course recruitment and course set up.
3. Guardian Net. Formulate rationale for utilizing their personal and business contacts and build a local Guardian net.
4. Global Odyssey. Establish a Guardian Centrum to coordinate their participation within Global Odyssey.
5. Sojourner Sabbatical. Create sabattical programs for using Guardian skills, Phase IV services, special skills.
6. Guardian Travel. Utilize Guardian travel for movement of supplies and services.
7. Wayside Inn. Make available RH guest rooms for Guardians traveling as paying guests.

Contradiction:

Current real estate management procedures are based on past images which do not reflect the complexity of holdings or anticipated acquisitions.

Thrust:

Bring movement expertise to bear on real estate management procedures.

Prime Activities:

1. Holdings analysis. Compile data on holdings via religious house questionnaire.
2. Data bank. Centrum file on real estate holdings.
3. Reporting scheme. Annual report on holdings picture.
4. Consultants list. Skills abstract of guardians and colleagues.
5. Legal Net. Metro/regional lawyer and accountant guild.
6. Business centrum. Liason with region for coordination and projection.
7. Acquisition criterion. Operation cost analysis of lease, rent, gift, buy.
8. Property management. Analyse investment returns and disposition criterion.
9. Goals definition. Ecumenical parish locations, future nodes.
10. Ownership schemes. Order incorporation and patron ownership opportunities.

Contradiction:

Current investment schemes do not further the Order's financial power

Thrust:

Bring Movement expertise especially in insurance and investment to bear on Order funds.

Prime Activities:

1. Create investment board of Order and movement to determine policy in relation to risk and growth, and to review investments periodically.
2. Integrate Order insurance policies
3. Investigate self-insuring and high deductible insurance
4. Establish liability limits policy relative to RH, EI property insurance
5. Investigate incorporating US and globally PH's to take advantage of tax umbrellas
6. Investigate income tax advantages of incorporating
7. Investigate contract employment by EI relative to income tax umbrella
8. Research Order youth actuarials including anticipated youth growth in numbers and update regularly relative to Education Fund.
9. Computerize accounting of EI, Order accounts using independent consultants when feasible.
10. Research depository(s) of global Order funds to maximize flexibility and minimize exchange losses.

Contradiction:

Present employment and visa possibilities limit the global use of troops

Thrust

Creating a stable yet versatile financial and legal base for global deployment.

Prime Activities:

1. Overseas Employment. Create a data bank with the capability of matching overseas employment opportunities with special job skills of movement personnel. Movement and Order personnel establish employment in firms that offer international mobility.
2. Overseas Services. Develop overseas services such as a cultural orientation course, practical cross-cultural research, and instruction in English.
3. Marketing Handicrafts. Initiate a model for marketing overseas handicraft produce, arranging wholesale outlets, buying and financing, for the support of community development.
4. Visa Files. Create comprehensive files of visa options, requirements, and restrictions, related to the citizenship and employment of movement personnel.
5. International Cultivation. Guardians develop new overseas entry and employment possibilities by intensive cultivation of indigenous leadership and international business associates.
6. Paper Corporation. Create one or a series of corporations on paper to provide special global employment, visa entry, and financial support for overseas houses.
7. Global Care. Create a globally applicable model for Order care, including insurance, child guardianship, etc.

GUARDIAN FOLLOW-UP PSU
April 22

TACTICAL THRUST SWIRL

SPRING QTR. 1973
Base Centrum

Tactical Thrust #	Tactical Thrust	Source Tactical Arena #
1	GUARDIANS ROLE OF EXPERTISE	9, 24, 25 26, 27, 38
2	SHIFT IN CARE FOR PUBLIC IMAGE	7, 8, 9, 35 37, 39, 40
3	ESTABLISH REGIONAL DEVELOPMENT FORCES	32, 33, 34, 40
4	COORDINATE GRASSROOTS, MAJOR, 1K DEVELOPMENT	36, 40, 42
5	ENABLING OVERSEAS SUPPORT	21, 43, 44, 45, 46, 47
6	GUARDIAN SABBATICAL (INTERN)	20
7	GUARDIAN TRAINING SYSTEM	20, 22, 23
8	ENTRE TO ESTABLISHMENT	41, 46
9	PROPERTY ACQUISITION RE: DISPOSITION PLANNING	1, 2, 3, 4
10	PROPERTY MANAGEMENT	4, 5, 6, 24
11	UTILIZING ORDER RE: EI FUNDS	9, 12, 13, 14 15, 16, 17 29, 30, 31
12	USE MISSION TO ENGAGE GUARDIAN IN RESEARCH	19, 20
13	PARTICIPATE IN FIELD TO RESEARCH GUILD	22, 35, 46
14	LEGAL STRUCTURE RE: FUTURE MISSION	4, 9, 18, 47
15	PROFIT MAKING ACTIVITY: WINE PRESS	10, 11

TACTICAL THRUST # 1

SOURCE TACTICAL ARENA #'s 9,24,25,26,27,38

GUARDIAN POOL OF EXPERTISE. Since the guardians come from all walks of life, they corporately form a pool of knowledge in almost every field of every expertise. This expertise can be used by the movement and the order on a consultative basis for model building and problem solving. Another possibility discussed was for several guardians to arrange their business so that one or more could be freed on a short term basis (3 - 12 months) for global assignment while the business was maintained in their absence. In this way, their expertise would ease entry into a country and assure employment once there. This would enable a firm financial base to be maintained while freeing others for penetration and formulation. Thru the use of questionnaires, data pertaining to expertise outside of their vocational area, i.e. language, pilots, etc., can be obtained and maintained in a computerized data bank. Other data such as contacts, professional, service, and social clubs, area and frequency of travel, etc. could also be gathered. Examples of this are:

1. Legal services such as incorporation, tax law interpretations, etc.
2. Property acquisition, disposition, and management.
3. Participation in continental, area and regional PSU's and workshops
4. Utilizing business trips to enable pedagogical and formulation assignments.
5. Establish and maintain a data bank.

TACTICAL THRUST # 2

SOURCE TACTICAL ARENA #'s 7,8,9,35,37,39,40

SHIFT IN CARE FOR PUBLIC IMAGE. The shift in what it means to care for the movement's image as implied in the Guardian recommendations is in the direction of a more self-conscious total thrust, in the sense that everything we do that is visible or effects the public however indirectly, is a part of the impact we make and will effect whatever response is elicited. In the business dimension, possible new tactical arenas include soliciting research contracts, setting up and strategically locating tutoring schools, soliciting research contracts for special consultant work, and researching the market for auxiliary services. All promotional materials would be written in the context of the total public relations thrust. Guardians will participate in PSU's on the E.I. and movement image, and use the recommendations from the Fall '72 meeting to begin to create the Guardians role in public relations. Through Regional and Metro Development Coordinators comprehensive public images will be adapted to local situations, such as regional council decor, with common adaption guidelines. Other tactics in this thrust will include sophisticated, imaginal brochures, slide presentations, cassette tapes, demonstration project films and photo displays and articles on resurgence. Guardians will also be concerned with developing long range sustaining stories for such relationships as patrons, in-kind development sources and major funding proposal models. As a part of this concern they will consider various perspectives for stories, and current social and business trends which effect movement concerns.

Elements:

The Guardians will participate in PSU's to research and develop the comprehensive story which will freight the image shift called forth by the turn to the world and rapid global expansion.

A set of sophisticated public relations tools, including films, tapes, and printed materials are needed, to be transported and/or distributed world wide.

Context and guidelines are needed for the local use and adaptation of those tools.

Exploration of business possibilities for marketable movement goods and services calls for the creation of an intentional, missional "advertising" approach for promotion of such items.

Long range stories and strategies are to be developed for sustaining key relationships such as patrons, and important in-kind sources.

TACTICAL THRUST # 3

SOURCE TACTICAL ARENA #'s 32,33,34,40

ESTABLISH REGIONAL DEVELOPMENT FORCES. The development centrum guild will take responsibility for the establishment of regional development forces. To do this it will be necessary to have long range projections of development needs and to design a development system which consists of a global development network with clearly articulated local operations procedures. The long-range projection sets the contextual indicative out of which men can decide to do development in a region. The development system design will organize itself in three source areas: regional development, major financial gifts and inkind gifts. It will be the level at which planning and implementation begins. The global development network is the framework in which the development forces work for coordination, training, and data interchange of the system. Finally, every local man in implementing development operations in his region will be engaged in creating and using tools and acts as well as being trained as he is training others, all this in the midst of actualizing development tactics.

1. Research development futures -- a PSU with guardians to develop a four-year global budget and to identify monetary and inkind sources to cover the budget.
2. Coordinate regional development activity with penetration and formulation at the metro level to build comprehensive missional goals for the metro.
3. Create regional development nucleus around the guardians for grassroots, inkind and major funding, with accountability system built in.
4. Train for local actualization -- utilize the practicum construct for training guardians and regional developers in all development arenas (grassroots, major funding, inkind etc.)
5. Actualize the regional development network through calling, follow-up, story creation and rehearsal and data interchange to maximize the return.

TACTICAL THRUST # 4

SOURCE TACTICAL ARENA #'s 36, 42

COORDINATING FINANCIAL SUPPORT THROUGH SOURCES DIRECTLY ACCESSIBLE TO THE GUARDIANS. Financial support for the movement other than outright contributions can be obtained through guardian resources and contacts. In general access to major sources of money requires the financial prowess and finesse represented by the guardian financiers. In instances where money or goods are held in trust funds it is possible to have the interest given to the Ecumenical Institute as a tax break for the fund's beneficiaries. Moreover, by lending their endorsements and financial backing the guardians can guarantee and secure large sums of money to be used for movement programs.

1. Money or goods can be solicited through bequests in wills, annuities and living trusts.
2. Interest free money placed with the Institute can be reinvested in blue chip stocks or savings accounts.
3. Low interest loans can be arranged through guardian buying power and then reinvested.
4. Patron gifts can be solicited from friends and business acquaintances.
5. High level contacts can obtain foundation funding for demonstration projects and international courses.

GUARDIAN FOLLOW-UP PSU
April 22

TACTICAL THRUST
and
FIVE ELEMENTS OF ACTION

SPRING QTR. 1973
Base Centrum

TACTICAL THRUST # 5

SOURCE TACTICAL ARENA #'s 21,43,44,45,46,47

ENABLING OVERSEAS SUPPORT. Guardians have several ways to enable overseas support of religious houses. Using their contacts, influence and experience, they can enable employment of colleagues assigned to overseas religious houses. In addition, when they themselves are overseas, they can stay at religious houses instead of hotels and pay according to the image of the Wayside Inn. Finally, with the knowledge of customs and visa requirements of various countries, the guardians could facilitate the travel and effectiveness of overseas colleagues.

1. Enable employment -- contacts.
2. Enable travel of colleagues -- knowledge of visas.
3. Contribute directly to overseas religious houses -- wayside inn.
4. Enable cultural effectiveness -- customs.
5. Enable employment -- references, influence.

TACTICAL THRUST # 6SOURCE TACTICAL ARENA #'s 20

GUARDIAN SABBATICAL. The form of the guardian relationship to the order that provides him with nurture in the common life of the order as well as intensive training in the religious is the guardian sabbatical. This would be a unique role in the movement in that the guardian on sabbatical would be neither a regional colleague nor a symbolic order member, although he would at times wear both hats. This may be moving in the direction of forming the external order and would resemble present intern training.

1. One year at a religious house.
2. One year at centrum assigned to post.
3. Global research trip.
4. Global penetration trip of recruitment, teaching and formulation.
5. Assignment to a demonstration project.

GUARDIAN FOLLOW-UP PSU
April 22

TACTICAL THRUST
and
FIVE ELEMENTS OF ACTION

SPRING QTR. 1973
Base Centrum

TACTICAL THRUST # 7

SOURCE TACTICAL ARENA #'s 20,22,23

GUARDIAN TRAINING SYSTEM. The Guardian Training System is out to create the religious in the midst of the secular. Through spirit and practical methods training, the Guardian recreates his self story as one living for the world on behalf of his neighbor. He grounds everyday experiences in the deeps. The Training System holds the Guardian before the Word, it focuses and intensifies the use of his particular gifts or situation. This means using his contacts with the business and professional world to assist in recruitment, development, and nurture. Guardian Training may include teaching in the Lens course, going on global trips or participating in PSU's.

1. Speaking engagements
2. Recruitment for Lens
3. Development pitches
4. Consults
5. Contacts with business, educational and social service agencies

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TACTICAL THRUST # 8

SOURCE TACTICAL ARENA #'s 41, 46

ENTRE TO ESTABLISHMENT. This tactical thrust is to bring intentionality, both in North America and the other eight continents, in the use of guardian personal contacts, service club affiliations, business connections, government contacts and travel exposure for movement permeation and development, and to collect and classify other key contact potentials for future cultivation of new opportunities for financial clout and support.

1. Cultivate key leadership from other countries.
2. Establish network of guardians with international business and government contacts.
3. Engage in local service club and social circles for developing funds and cultivating possible donors.
4. Become aware of business associates who belong to influential groups and create battleplan for strategic personal calling and participation in local functions.
5. Encourage key persons within social groups to use their influence for sponsorship or development -- recruitment to Lens or RS-I may be prime motivating factor in this area.

TACTICAL THRUST # 9

SOURCE TACTICAL ARENA #'s 1,2,3,4

PROPERTY ACQUISITION AND DISPOSITION PLANNING. There is an increasing demand for procuring, effectively operating and disposing of global properties, therefore expertise from movement guardians is needed to compete in the arena of finance and business. Effective record keeping and updating systems will be important to future projections, especially order memory relative to the acquisition of religious houses and base property. The guardian expertise and gifts can be used most creatively by the movement through the use of a comprehensive resource list of each guardians' possibilities. PSU's in the arenas of future projection, development, management and order relations will be needed to utilize available skills which will in turn enable global property acquisition and disposition planning. Finally, there is need for preliminary gridding and data gathering relative to real estate which will result in a practical real estate model and a comprehensive timeline.

1. It is recommended that religious house property be leased whenever possible, especially for the first year, with an eye always open for a "gift" or in-kind house.
2. It is recommended that a patron ownership structure be formulated.
3. It is recommended that the possibility of obtaining the Lakeside property via a land contract be investigated, as well as the FHA refinancing of the property.
4. It is recommended that there be an investigation of financing deficits through movement bonds and notes held by movement members.
5. It is recommended that a real estate grid of Uptown be created and related to existing zoning regulations to the intended demonstration project.

TACTICAL THRUST # 10SOURCE TACTICAL ARENA #'s 4, 5, 6, 24

PROPERTY MANAGEMENT. The tactical thrust of property management will spell out the existing values used in the management of properties with missional effectiveness and evaluate them to anticipate the growing complexity that is coming with Religious House expansion and 5th City reduplication. It will also discern ways of drawing the expertise of the Guardians and Phase IV colleagues to form a management and administrative task force that will maximize the missional effectiveness of the present management structures.

1. Present management systems be written up with values being held objectified.
2. Guardians be consulted on evaluation and revision of management structures.
3. Sojourn, intern program for elders be initiated for elders who could reside at Lakeside.
4. Principles of missional effectiveness in property management be established.
5. Possibilities of obtaining and maintaining a Continental transportation fleet with concrete options pro and con spelled out.

TACTICAL THRUST # 11SOURCE TACTICAL ARENA #'s 9,12,13,14,15,16,17,29,30,31

UTILIZING ORDER RE: EI FUNDS. Utilization of funds of the Ecumenical Institute and the symbolic order needs to be both comprehensive and revolutionary in scope in order to enable the maximum missional possibilities, and also provide a sign of what can be done to cut across the economic tyranny experienced by corporate groups in the 20th Century world. At this point, the primary block to defining fiscal actions in a number of crucial financial arenas is a clearly stated fiscal policy for both the order and the EI that is intimately linked to the revolutionary operating principles we must honor if our task is to succeed. As a beginning toward defining these policies, comprehensive research into the means of reducing expenditures and maximizing investment return is needed in order that the possible avenues of operation can be exposed to the broader questions of basic policy. Guardians knowledgeable in such areas as investment, insurance and tax structures can bring these arenas of concern into clear focus through research which pulls this information into usable forms. Reports on this work will enable a group of Guardians and order members to forge out the comprehensive fiscal policies for both the EI and symbolic order, which would include the underlying revolutionary principles that must be considered in missional financial operations and the guidelines to various funds. This group will then submit these recommendations on the broad fiscal policies for modifications and consensus adoption by the total body.

1. Build structures to actualize a carefully researched integrated investment system in order to maximize protection and growth of order and EI funds.
2. Research possibilities of utilizing insurance to maximize care of order needs at minimum expenditure.
3. Investigate short and long term benefits to order and EI derivable from current and projected tax structures.
4. Articulate basic fiscal policy regarding order and EI financial operations that reflect sound management and revolutionary thrust.
5. Identify the arenas of possibility for effective fiscal operation, prioritize their actualization, and create structures for evaluation their status.

TACTICAL THRUST # 12

SOURCE TACTICAL ARENA #'s 19, 20

USE MISSION TO ENGAGE GUARDIAN IN RESEARCH. An invisible network of structures, methods, and human resources are in being in the region, operating as a "net of care" so that guardians always have available the support, guidance, and wisdom of the Symbolic Order; while, in turn, the Symbolic has available the support, influence, and expertise of the Guardians. In other words, the support system is a two-way street. It provides methodologies and structures that enable the guardian to turn matter into spirit in every situation and thereby finding meaning in every situation, giving secular man a chance to significantly engage as mission wherever he is. It builds the context for on-going development to occur so that development serves as an effective formulation dynamic in the region. Most important, the guardian--in actuality--becomes part of the support system as he becomes a vital part of the movemental machinery. The movement structures and activities call for his skills, wisdom, and sensitivity to the establishment. He is the accountability that breathes raw data, practical expertise, and sophisticated style into the system, thereby keeping it honest to the needs of local man.

5 elements:

1. The Regional Practicums create a permission-giving context for on-going developo to take place in the region.
2. Finance PSU provides opportunity for models to be built on the local level to deal with financial contradictions.
3. Religious House can be tapped for speakers and resources at development meeting.
4. Workshops in style enable guardians and the members of the symbolic order to bring intentionality and sophistication to their style of life.
5. The secular solitary provides the avenue for establishing self-consciousness about the guardian as a man who continually meditates, contemplates, and prays.

TACTICAL THRUST # 13

SOURCE TACTICAL ARENA #'s 22,35,46

PARTICIPATION IN THE GUILD DYNAMIC. The Fourth Guardians' Consult has been named by some as the first meeting of the Guild. Without specifically naming it, the Guardians have asked to participate in the guild dynamic by specifying the arenas in which they are willing to engage as the Movement in joining with secular society in shaping community structures.

1. With the help in planning and arranging by the Religious House, the Guardians will participate in speaking engagements in the community about the Movement to develop credibility.
2. The Guardians will become an integral part of the forces participating in the preaching mission.
3. In the turn to areal and regional fund raising, the Guardians will become the liaison between the Institute and the corporations and foundations in their community or within their acquaintance range.
4. In the expansion of the inkind experiment, the Guardians will keep abreast of the current and long-range needs, such as, Kemper renovation materials, Summer '73 supplies and other ongoing needs, and will assist in making initial contacts with suppliers for contributions.
5. In order to effectively permeate the business community and create necessary income for the religious houses, the Guardians through their local contacts, will assist in creating an employment net, both on the continent and overseas.

TACTICAL THRUST # 14

SOURCE TACTICAL ARENA #'s 4,9,18,47

LEGAL STRUCTURE RE: FUTURE VISIONING - As the work of the Movement and the order within the Movement become more complex, the Movement will have at its disposal legal council which will act as an advisory board. This board will (by virtue of its movemental status) participate in long range planning and visioning to anticipate the trends in tax sheltering, capital gains flow, paper holding corporations, real estate disposition, antitrust suits. In addition, international laws need to be interpreted in regards to travel, paper holding companies, customs and currency exchange. The necessity of setting up a central filing system to hold all legal documents of the Movement and order's business negotiations. Attorneys and accountants that could participate as counselors or in the advisory capacity should be registered by area.

1. Self-conscious creation of legal resource pool that functions, in advisory and counseling capacities to both the Board of Directors and the Panchayet.
2. Identify special skills immediately needed: an international council, tax consultants, IRS liaison, lawyers who have retainers with major corporations, specialists in institutional law proceedings.
3. Create liaison with establishment legal entities to anticipate incorporation procedures and establish a base point for tax shelter.
4. To create paper holding companies overseas, expedite currency exchange and establish legal base and complimentary relations with internationally based companies, for the purpose of obtaining blanket visas and skill related jobs.
5. To provide a visioning and to anticipate trends in federal funding and corporation funding and provide abstracts and data concerning future legal courses to pursue.

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TACTICAL THRUST # 15

SOURCE TACTICAL ARENA #'s 10,11

PROFIT MAKING ACTIVITY: WINE PRESS. In the past, religious organization and religious orders in particular have discovered the usefulness of revenue employment within the jurisdiction of the order. These money-raising activities range from the selling of souvenirs in St. Peter's square to the bottling of wine in a monastery, and are often referred to as "wine press" activities. Their usefulness is based on gaining revenue by exploiting possibilities already "given" in the decided mission. As examples of this principle: 1) The activities often incorporate the use of order personnel (thus enabling interchange of troops without employer hassle); 2) the use of a skill or business to gain entrance to a geographic (or political, etc) area; 3) capitalizing on the richness of a locale to birth resources for the church and/or community, and 4) as a demonstration of the mission of the order. "Winepress" operations enable the order to free itself from economic tyranny by putting the order itself in control of employment, income flow, and more free mobility of its members.

- 6 Global Real Estate Guild.
- 8 Guardians Pool in relation to Management Expertise.
- 9 Consultation and Enablement Skills in relation to Property.
- 11 Investment policy Board in relation to investment management.
- 18 Directory of movement Guardians in relation to investment opportunities.
- 21 Symbolic Centrum Business division.
- 27 "Office of Vision and Response" in relation to 5 year Fiscal plan.
- 28-1 Task force of Guardians in relation to Movement Data Bank.
- 32 Regional Development Coordinators.
- 35 Metro Development Coordinators
- 40-1 Speakers bureau in relation to local man's image of the movement.
- 55 Metro Capital Fund task forces in relation to data on local organizations.
- 127-3 Team of Guardians for each area in relation to assignments to consults.

- 1-1 RESOURCE LIST of movement people thin the regions who have wisdom relative to property for benefit of Property Centrum.
- 22-4 PROPERTY ACQUISITION QUESTIONNAIRE semi-annually to each Religious House re local ordinances, for updating the Property Acquisition Manual.
- 2-4 PROPERTY AQUISITION FORM to collect Order Memory on acquisition of Religious Houses and Base properties.
- 8-1 GUARDIAN TALENT SURVEY listing guardian gifts, talents and expertise.
- 23-2 PUBLIC IMAGE QUESTIONNAIRE for movement colleagues to determine present and needed E.I. Image in key areas where development and support is needed, i.e. denominations, business, government agencies, grads.
- 51-1 AREA DEVELOPMENT DATA: Collect data and stories for use by area developers.
- 70-2 OVERSEAS EMPLOYMENT QUESTIONNAIRE calling for employment information, business contacts, skills requirements, salaries, etc. besent to movement contacts in North America and regions overseas. (Also 116-1)
- 77-1 MULTI-NATIONAL FIRMS: locate positions with international mobility using questionnaire to Religious Houses, Guardians, RS-I Grads, and prospective industires (research survey).
- 93-1 OVERSEAS EMPLOYMENT DATA gathering from publications, agencies, corporations and personal contacts.
- 110-4 GLOBAL STYLE QUESTIONNAIRE to Odyssey and Global Trip returnees to determine socio-spirit and style issues as well as the characteristics of various cultural life styles.
- 113-1 IN-SERVICE PROGRAM GROUPS listed by LENS grads.

- 36-1 Training event in conjunction with regional practicum.
- 40-3 Color slide presentation of demonstration projects and global trips.
- 40-4 Film the 5th City demonstration project.
- 43 Workshop providing patron impact story and style.
- 71 Courses of instruction in English and other languages.
- 73 Course of instruction in Movement Research methodology.
- 74 Course of "cultural immersion."
- 81 Language and culture courses to beautify ugly Americans.
- 88 Course materials and teaching tools for cultural orientation.
- 110 Socio-spirit (Edge)/Style workshops.
- 112-1 LENS participation in relation to "desert nurture" model.
- 117-3 Three classical talks on resurgence.
- 128-2 LENS pedagogy and appropriate teaching schedule for Guardians.
- 124 Guardians trained as sophisticated consultants.
- 24 Weekend "Fiscal System" Seminars.
- 30 Revolutionary Fiscal principles as lecture series.

- 1-3 PROPERTY ACQUISITION SYSTEM: Define relationship of future projection, development, management and Order strategies relative to property Acquisition and facilities operations.

- 2-1 PROPERTY ACQUISITION MANUAL: Design format of a manual of property acquisition criteria, issues and possibilities. Some issues are local ordinances, tax shelters and real estate financing. By present movement Guardians.

- 21-1 BUSINESS DIVISION TASKS: Build a functional task model delineating the various jobs of a Business Division at Symbolic Centrum which would encompass such posts as Development, Investment Portfolio, Accounting, Data Processing, Regional Fiscal Coordination and Movement Skill and Product marketing. By expert Guardians and appropriate Order Staff.

- 22-1 DEVELOPMENT COORDINATION: Comprehensive plan for integrating development efforts. By Guardians and appropriate Order staff.

- 23-3 E.I. PUBLIC IMAGE: The Public Image of the Ecumenical Institute. By Movement Guardians.

- 28-2 HUMAN RESOURCES BANK: Research operation methods of a human resources data bank containing names, special skills and contacts of colleagues. Investigate sources of computer facilities as in kind donations, and establish computer program specifications.

- 29-1 GUARDIAN SABBATICAL PROGRAM: Establish guidelines for a guardian sabbatical program to give business persons and professionals and spouses the opportunity to intern or sojourn.

- 30-1 REVOLUTIONARY FISCAL PRINCIPLES: Outline revolutionary fiscal principals. By guardians and order members.

- 61-1 KEMPER RENOVATION IN KIND: Locate the sources and forces for in kind contributions to the Kemper renovation. By Guardians at regional level.

- 69-1 IN KIND HANDLING MODEL: Create a model for the transportation and storage of large or perishable in kind gifts.

- 67-1 FUTURE INKIND REQUIREMENTS: Forecast programatic needs of every area of the globe for use in inkind solicitation. Forecast programs, itemize specific needs, and write up Summer '73 as sample proposal for immediate testing by using it with Guardians. By order centrum.

- 78-1 MARKET REFORMULATION METHODS: Identify agencies and organizations with whom Community reformulation methods could be marketed.

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RECOMMENDED PSU's

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- 113-3 PRIORITIZE GROUPS/CONTACTS: Choose and prioritize secular groups to be impacted and individuals to be contacted by Guardians. Held in Areas by Guardians.
- 119-3 EVENT FEE GUIDELINES: Establish financial guideleines for regional secular permeation events such as LENS Course & Speakers Bureau Honorariums. By Chicago Guardians and centrum leadership.
- 118-3 SPEECH WRITING MANUAL: Prepare a manual describing how to develop art form conversations, minispeeches and secular religious greetings and closings.

- 9-3 Conduct real estate practicums regionally.
- 22-4 Use development practicums where appropriate to integrate development efforts.
- 25-1 Guardians, etc. meet to draw together data from practicums and
-2 other records in order to develop long range movement AIDE fiscal model.
- 30-2 Use regional practicum to develop lectures on Revolutionary fiscal Policy.
- 37-2 Year end victory celebration at regional council for pledge accountability and acknowledgement.
- 44-3 Quarterly guardian meeting for strategic penetration of social structures for initial patron contacts.
- 53-1 Areal guardian meeting for assuming responsibility for major funding.
- 55-3 Have metro capital fund task force contextual meeting to enlist movement support.
- 60-1 Guardians participate in development meetings.
- 61-0 Have regular in kind strategy sessions for guardians, regional Galactic and religious house colleagues beginning with Kemper needs.
- 80-2 Hold development practicums in field so that the guardians establish a global development model.
- 80-4 Hold practicum follow-up.

- 1-4 Gather, up date and organize the existing records on properties and operations.
- 3-1 Create a form for obtaining order memory on acquisition of
-2 religious house and base properties, esp. Kemper.
- 3-3 Create a list of currently or potentially available facilities that could be used by the movement.
- 4-2 Gather data on current ownership and tax status of the uptown ecumenical parish.
- 6-4 Periodically publish signal property acquisitions and anticipated needs.
- 7-2 Create operations and maintainance manuels an major equipment.
- 20-1 Compile central file of real estate holdings and supporting records.
- 23-4 Prepare imaginal annual fiscal reports and projections.
- 31-3 Regions supplies centrum with complete donor list.
- 34-1 Compile list of regional donors, date last called on and responce.
- 37-3 Set up regional card file of people who have pledged for accountability and pledge acknowledgment.
- 40-2 Develop and put on cassett Global story.
- 40-3 Create color slide presentationsof demonstration projects and global trips.
- 40-4 Create film on 5th City Demonstraton project.
- 41-2 Create file of miracle stories on patron calls.
- 50-1,3 Create high quality, imaginal calling documents.
- 51-3 Store matrix of data and stories used by area developers.
- 57-2 Write an imaginal report on programs in progress.
- 58-1,5 Create an area data interchange newsletter for newly procured needs in fund raising.
- 61-2 Create a comprehensive Kemper renovation list to be secured by regions.
- 62-1 Have printed material telling story of global demonstration projects.
- 62-2 Compile list of gifts and donors in past years.
- 126-3 Design innovative borchures, pitches, advertisements.

- 63-1 Create necessary form for an inkind donor recruiting system; such as, calling reports, prospect analysis, timeline structures and follow-up.
- 65-1,5 Create and maintain a current inkind requirements file that includes present and projected needs for goods and services.
- 66-2 Obtain reference materials like Thomas Register, SIC codes, Industrial Association indexes, etc.
- 67-3 Write Summer '73 proposal as a sample proposal and test.
- 70-3 List of periodicals advertising overseas jobs.
- 71-4 List of people serving in tutoring capacity.
- 76-3 Obtain access/customer/pitch/brochures.
- 80-1 Donors manual.
- 83-4 Utilize micro-film techniques for storage, retrieval and re-duplication of data.
- 92-1 Gather and store in useable form, restrictions on activities imposed by visas.
- 93-3 Index data on order and extended order on occupational experience and expertise.
- 94-1 Acquire copies of publication "Educational Opportunities Abroad."
- 97-3 List of Guardian availability and capability.
- 98-2 File at Base of employment opportunities in 8 continents.
- 98-3 Guardians submit journals, etc. of overseas employment opportunities.
- 108-1 Printed material to show relationship to Institute of Cultural Affairs rather than E.I.
- 115-3 Manual for guidelines, policies and suggested publication outlets.
- 117-3 Develop materials for well known speakers.
- 118-1 Develop manual for mini speeches, secular greetings.
- 122-3 Data file for houses reporting consultation needs.
- 122-4 Data file for keeping and disseminating deployment possibilities.
- 124-1 Visionary document on urgency of the times.
- 124-2 Handbook of crucial customs and laws.

ACCOMPLISHMENTS

1. Prioritized 9 Recommendation Arenas with valence chart
2. Prioritized 15 Tactical thrusts
3. Created imaginal calendar for six months
4. Outline centrum/house relations to guardians
5. Built manual for Spring Guardian Consult , showing projected, actual and recommended future models
6. Compiled donor listing, with amounts for 24 regions
7. Prioritized 24 regions according to potential large givers:
 - a. \$1,000
 - b. \$500 to \$1,000
8. Established regional potentials totalling \$300,000 for the continent
 - a. Example of regional potential: San Francisco: \$30,000
9. Ready to lay out top cities on 8 week timelines with \$100,000 by June 30.
 - a. Sources of data:
 - (1) Practicum results
 - (2) Guardian list
 - (3) Donor cards
 - (4) Prioritized donor print-out

CONCLUSIONS

1. Holding the overall Movement context is crucial in dealing with Guardians.
2. No need to be intimidated and not ask them for money or to participate in raising money, for this was stated by them as one of their key roles.
3. Need to enable Guardians to be contexted fully in operating procedures of Order.
4. Part of their journey needs to be training in revolutionary principles.

IMPLICATIONS

1. Created imperative on Order to follow-through on six-month relations
2. The Guardians have now been called forth as ongoing dynamic within the Movement as seen in six-month timeline.
3. Gotten clarity on journey Guardians have been on and made decisions on care needed for journey in the future. May need group just to see that this journey continues, while at the same time keeping the Guardians integrally involved as part of entire Movement dynamic.
4. We can raise \$100,000 by June 30 through donor calls with help of Guardians.