

STRATEGIC PLAN TAI CHI FOUNDATION (TCF)

2020-2023



PREPARED BY THE STRATEGIC PLAN COMMITTEE:

**Bob Etherington
Margaret Matsumoto
Roger Noon**

Version 1.0: August 2020

Contents

Introduction & Summary by the President of the Board3

Mission, Vision, Values and Beliefs4

History.....5

Meeting the Current Need.....6

Our Place in the Market8

A Closer Look at What We Do8

Strengths and Opportunities9

Summary of Core Strategies10

Governance.....10

Organizational Governance.....10

Financial Governance11

Goals and Objectives12

Appendix 1: Objective Planning Template.....15

Introduction & Summary by the President of the Board

It is my privilege to introduce the 2020-2023 TCF strategic plan. Its creation has been part of a dynamic planning process and as such it is a living document that will be revisited and updated regularly. We have looked closely at our strengths as well as our vulnerabilities and we recognize that we are continuously learning from our experience. Our discussions have been at times serious, comical, frustrating and engaging, but we have always stayed schooled on one critical focus: “the big picture”, or how to best position the Tai Chi Foundation for the future. At its core, this plan recognizes that in striving to provide quality services to the community, we must ensure that we have a strong infrastructure that will sustain our current and future programs as well as invest in our most valuable resource - our community of teachers.

We have a clear mission and strategic sense of purpose, rooted as it is in a well-defined set of beliefs and values that are embedded across our international organization. Achieving our five stated goals and associated objectives will help us become stronger and more resilient, with improved flexibility, more relevant services and a better ability to connect and serve our target audience in the general populace.

This plan is based on TCF committing to the strategic goals and objectives presented here and then generating the more detailed operating plans to deliver them. Some of these plans are already quite mature (e.g. the curriculum revision project), whilst others require inception (e.g. our research aspirations). All plans will be implemented through existing working groups. Providing a clarity of purpose in these key areas will allow us to move forward with confidence towards the fulfillment of our mission.

I am grateful to everyone who has been involved for their guidance, contribution and commitment in helping this plan take shape.

Sincerely,

Robert Etherington
Tai Chi Foundation, Inc
President

Mission, Vision, Values and Beliefs

TCF's Mission

The Tai Chi Foundation's mission is to improve health and consciousness through the study, practice and teaching of Tai Chi and QiGong to an ever-increasing portion of people worldwide.

TCF's Vision - *Imagine a world...*

...Where self-responsible individuals recognize their connection to others as they find their own

...Where healthier and happier people are able to manage their energy and discover ways to care about themselves and others in a meaningful way.

...Where the sick and terminally ill, the elderly, and the physically challenged all find increased health, happiness and peace through Tai Chi practice.

TCF's Core Values and Beliefs

We are a vibrant organization of well-trained Tai Chi teachers committed to maintaining high standards of quality and integrity. We seek to broaden and deepen the public's understanding and practice of Tai Chi as a way to increase health and consciousness for a wide range of people (including the sick, the stressed and the well). Our values and beliefs are based around the practice, studying and teaching of Tai Chi and QiGong.

Practicing Tai Chi

We believe that Tai Chi brings consciousness, awareness, health and peace to those who practice it and to those who interact with practitioners.

We recognize that the vitality of life is enhanced through the practice of Tai Chi and that its embodiment of awareness in the dantian (or movement center) is the key to spiritual development.

We affirm that Tai Chi develops an understanding that we are all connected and that we all serve humanity.

Studying Tai Chi

We recognize that learning Tai Chi is a lifelong process that requires being open-minded to the best practices in teaching and learning.

Tai Chi challenges us to work on the physical, emotional, mental and spiritual levels. All are important to the process.

We know that one of the best ways to learn Tai Chi is to learn to teach.

We want our community of practitioners to have the best education and teaching experience we can provide. To achieve this, we strive to maintain integrity, respect and

Teaching Tai Chi

We are committed to the values of Tai Chi as taught by Professor Cheng Man-Ch'ing and Patrick Watson. Fundamental to these is the belief that the best way to ensure that Tai Chi is transmitted and preserved is to teach a school of teachers.

We teach as part of local teams, which are part of a common international organization.

We recognize and value innovations in teaching by our teachers. We incorporate these into our curriculum, while preserving the integrity of transmission from Professor Cheng Man-Ch'ing.

TCF's Strategic Goals & Objectives

Expand our knowledge
Grow our membership

Ensure teacher quality
Ensure curriculum quality
Support our schools

History

Patrick Watson founded the school in 1975 as “The School of T’ai Chi Chuan, Inc.”¹ or STCC. At around the same time Patrick also established the Tai Chi Foundation (TCF) as a US 501(c)(3) non-profit organization to undertake future educational projects, serving mostly as a repository for archival materials such as films and recordings.

Almost immediately, affiliated organizations developed in Europe. As the first school in Europe, the Amsterdam-based Stichting School of T’ai Chi Chuan fulfilled a centralized and leadership function for Europe in general. London and Dublin followed and whilst some schools have come and gone over the years (e.g. Berlin, Copenhagen), we now have other established locations in the UK and Austria. Each location offers Tai Chi classes and trainings as its primary purpose.

In the US, we shifted entirely to a non-profit, 501(c)(3), tax exempt structure in the late 1990s with the view that this was more compatible with the school’s mission as a teaching organization and would allow TCF to attract money from both the public and private sectors to conduct more events, give scholarships, and grow as a school. TCF therefore purchased STCC’s assets and liabilities. STCC was dissolved, and the school was re-established as the Tai Chi Foundation, Inc. The by-laws of TCF were amended to permit the election of a Board of Directors by the members. Responsibility for all school functions, policy decisions, and finances are all guided by this elected board of directors.

Originally, the main source of financial support was royalty payments received from the US and European teaching locations to the main STCC, typically a percentage of income from classes taught by STCC-trained teachers. The TCF board has since added membership dues for individuals. Minimum dues currently stand at \$120 per year or the equivalent in other currencies. Minimum royalty payments are 5% of a location’s gross income from tuitions, intellectual property of TCF. (For a more detailed breakdown of TCF revenue sources as percentage of income, please see the annual reports.)

TCF also receives a small number of donations and gifts. In 2009, the Cate and Lou Bellafiore Foundation made a substantial, one-time, gift of \$250,000, subsequently increasing to \$300,000, to grow the school through marketing and capacity-building.

From the beginning, we have pursued a mission with two complementary goals: **Teaching** Tai Chi to the public through a comprehensive curriculum of progressive courses (using a ‘team teaching’ philosophy) and **training teachers** to teach Tai Chi. At the founding director Patrick Watson’s behest, eight of his teachers formed a leadership group to carry forward this mission, even beyond his death in 1992. The core of the school’s teaching is based on students attending weekly classes to learn the basic Tai Chi “form” (movements in sequence), then continuing for a number of years through more advanced levels of study.

The training of teachers to teach Tai Chi is a further educational process that requires additional commitment in time and energy, a high degree of physical embodiment, and adherence to high ethical and professional standards. Team teaching in a collaborative and relaxing environment is a hallmark of the TCF method.

¹ T’ai Chi and Tai Chi are used throughout this plan reflecting common usage. The T’ai Chi Foundation, Inc. was incorporated with the apostrophe and a space in the name as shown in this sentence. Many affiliated schools have chosen to use “t’ai” instead of tai. Tai Chi, without the apostrophe, was selected for the website to accommodate search engines.

Meeting the Current Need

Tai Chi is for everyone. Children, young adults, and seniors can all learn Tai Chi to great benefit.

TCF serves the general population of all ages by offering a healthy mind-body-spirit practice of Tai Chi Chuan. According to the US National Institutes for Health, research findings suggest that practicing Tai Chi may improve balance and stability in older people and those with Parkinson's Disease, reduce pain from knee osteoarthritis, help people cope with fibromyalgia and back pain, and promote quality of life and mood in many people, including those struggling with heart failure and cancer.

Closely associated with Tai Chi is the practice of Qigong, which is also transmitted by TCF. Qigong is a system of coordinated body-postures, movement, breathing, and meditation and in common with Tai Chi, typically involves deep rhythmic breathing, and a calm meditative state of mind. Whilst there is less research on the effects of Qigong, some studies suggest it may reduce chronic neck pain and pain from fibromyalgia. Qigong also may help to improve general quality of life and in common with Tai Chi, offer psychological benefits, such as reducing anxiety.

Here are 12 benefits of Tai Chi² for seniors³:

1. Relieves physical effects of stress
2. Promotes deep breathing
3. Reduces bone loss in menopausal women
4. Improves lower body and leg strength
5. Helps with arthritis pain
6. Reduces blood pressure
7. Requires mind and body integration through mental imagery
8. Accumulates energy by releasing endorphins rather than depleting them
9. Enhances mental capacity and concentration
10. Improves balance and stability by strengthening ankles and knees
11. Promotes faster recovery from strokes and heart attacks
12. Improves conditions of Alzheimer's, Multiple Sclerosis, and Parkinson's

In recent years, a number of articles have been published which show an increasing interest Tai Chi. For example:

- CNN published an article in September, 2017, entitled "[Tai Chi fights stress, getting popular with Millennials](#)." This article explains how younger generations are taking up Tai Chi in order to reduce stress and ground themselves. The article states that the gentle nature of the practice of Tai Chi has a different impact on them than other popular sparring sports found in gyms and is thus helping to de-stress those that spend their days sitting behind a computer. Even the employees at Google are offered Tai Chi classes, boosting not only fitness, but mental health and creativity.

² National Institutes of Health, National Center for Complementary & Integrative Health

³ Seniors: people over the age of 60.

- Fortune 500 companies are offering Tai Chi in the workplace. One of corporate America's highest avoidable production costs is in lost productivity due to employee stress. U.S. businesses are losing \$300 billion per year due to stress (that's over \$7,500 per employee, per year), which may be why the Occupational Safety and Hazard Administration (OSHA) has declared stress as a workplace hazard.

According to Forbes Magazine, Terremark Chairman/CEO Manuel Medina even believes that practicing Tai Chi is the key to his success! Studies are now showing Tai Chi improves decision-making and heightens creativity. The Mayo Clinic, the National Institutes of Health, Oprah, Dr. Oz, and many other high-profile figures are now recommending Tai Chi for better focus, concentration, and overall well-being. "Tai Chi gives me a stronger focus, better crisis management skills, and it controls my asthma so that I'm off my medications," says Elizabeth Holmes, business manager of a food processing company in Boston, who takes Tai Chi

- [The IHRSA Health Club Consumer Report](#) (International Health, Racquet & Sportsclub Association) shows that the opportunities to attract and engage Baby Boomers and Silents⁴ have significant profit and growth implications for club owners and managers.

In 2020, throughout the COVID-19 crisis, we have experienced a global shift in social norms. As a result, we have witnessed a renewed interest in Tai Chi as part of the public's greater awareness and focus on wellness practices during long periods of lockdown. This has been driven by curtailed socialization, reduced access to normal modes of exercise and wellness activities, and a lack of access to nature. This renewed interest has accelerated our ability to provide stronger virtual access to our programs and we have successfully moved on-line through the offering of weekly virtual classes and summer trainings.

⁴ Silents = born between 1925 and 1945

Our Place in the Market

TCF has been pursuing a strategic intent to provide more flexibility and breadth to our curriculum. This has resulted in the development of innovative course material, such as Roots and Branches Five Element QiGong™, with associated seasonal ‘tunings’ which are proving popular with students, teachers and newcomers who have found TCF online. Over the past 3 years we have had more than 1,000 subscribers to our multiple online tuning offerings.

TCF & the affiliate schools have a very strong presence on the Internet. TCF enjoys a \$100,000 Google annual grant which allows us to promote our schools worldwide. Led by a former non-profit executive and TCF past president, John Szostek, our Google statistics show impressive organic visits to the TCF website and high click-throughs. The website also guides individuals to “Find a School”, watch a free video, find an event, and read more about the health benefits of Tai Chi.

An aspiring student who wants to learn Tai Chi, or even a more advanced student, can learn many Tai Chi techniques online using our educational video series and free online courses. The best way to learn, however, is through quality in-person learning. Thus, we offer weekly classes in many locations, and customarily, intensive residential summer retreats on the US West Coast, East Coast, and in Europe.

We aim to retain and recruit new program participants and provide attractive benefits for joining members. We also aim to be recognized as one cohesive international entity, united in purpose and in spirit, able to reinforce relationships between TCF headquarters in NYC and all teaching schools, whilst providing support to nascent or smaller schools still on the rise.

A Closer Look at What We Do

Our school specializes in training Tai Chi practitioners in the art of “how to teach”. Having taught well over 25,000 students, we have made a major contribution in defining the professional standards for excellence in teaching this art. Although developing an experienced Tai Chi teacher is a lengthy process, we support a contemporary functional approach to developing Tai Chi teachers, not only because of the health concerns of our aging population but also as the need for pragmatic and valuable survival tools increases in the years to come for all of us.

The TCF teacher training program is time and energy-intensive designed to yield results. Those who have completed the basic teacher training are identified as “apprentices” or “teachers-in-training” who continue their education through leading local classes in their area and through frequent participation at annual TCF-sponsored intensive summer and winter trainings and workshops. The most accomplished teachers become the well-respected teaching faculty for the rest of the teachers.

People of all ages are attracted to teaching this flowing art form. Retirees especially are finding Tai Chi a well-suited art form to teach that matches their energy level and more contemplative perspective of their later years. The effort invested in becoming a proficient teacher yields multiple returns as a teacher gains an ever-deepening understanding of the art, with the rewards of good health, lowered stress levels and a grounded positive attitude toward life. While the

world moves toward an increased use of technology and exciting new trends in online learning, Tai Chi teaching remains consistent in its timeless and universal presentation: physical movement, internal and kinesthetic awareness, and a wholistic embrace of what it means to be a human in harmony with one's physical and social environment.

Many of us who are active teachers find that teaching calls upon us to be at our best and to exemplify Tai Chi principle for our students. For example, teaching the concepts of relaxation and centeredness to our students through Tai Chi or Qigong challenges us to embody these very Tai Chi qualities in ourselves. An hour or two of teaching tends to bring the teacher into a state of clarity, of being both aware and relaxed, and solidly integrated on the physical, emotional, mental, and spirit levels. How many people can say they look forward to going to work and can attribute their work to their sense of well-being?

Our Tai Chi teachers often offer classes to the public at their own or rented studio space. Others can be found in private practice, group practices, affiliated with chiropractic clinics or hospitals, multi-disciplinary wellness centers, athletic and sports organizations, retreat centers, skilled nursing facilities, spas, etc.

The week-long summer and winter trainings in the US and Europe have been held without interruption for more than 40 years, almost since the beginning of the school. The **Summer Training** is open to both apprentice teachers and the public while the **Winter Training** is a concentrated period of study designed solely for teachers and teachers-in-training. For the past three years an average of 3 summer and 3 winter trainings have been held per year with a combined attendance of approx. 140 participants (summer) and 110 participants (winter).

Strengths and Opportunities

Our key strengths are the quality of our teachers, our curriculum, our affiliated school structure and our international presence - all are key elements in our ability to provide an inspiring, high-quality and consistent Tai Chi experience to students anywhere in the world.

Our organization also has a natural agility since it is relatively straightforward for experienced teachers to begin and grow new schools in different locations. Through the due diligence of our underwriting process for trainings we can respond to local financial concerns and readily support our affiliate schools. Our Winter and Summer Trainings act as focal points for bringing teachers (Winter) and students (Summer) together from many of our various locations. These gatherings foster collaboration and creativity, reinforcing our culture and values.

Our strategic goals (see below) aim to leverage and develop these strengths for the benefit of our Tai Chi community.

Looking externally, we see clear growth opportunities supported by the mounting scientific evidence of the benefits of Tai Chi. For example, we attract seniors who look for health benefits including improved balance, posture and leg strength. There is also a growing interest in mind-body-spirit activities such as mindfulness, meditation, Pilates and Yoga as well as in Tai Chi. These activities are found in the private, health and corporate sectors as part of programs that focus on areas such as wellbeing, mental/physical health at work, therapeutic applications in end-of-life-care and support to caregivers and families of the sick and dying. Initial introduction

to these activities is often via drop-in or pay-as-you-go classes. The COVID-19 crisis has also revealed unexpected opportunities in on-line teaching with the potential to reach a broader and more global public.

Summary of Core Strategies



Governance

Organizational Governance

TCF is a membership organization that draws from its ranks to fill, on a primarily volunteer basis, positions on the Board of Directors as well as committees and special project groups. The board is a voluntary body with 100% participation in financial giving to the organization. It has the fiduciary responsibility of ensuring TCF remains financially solvent in order to be of assistance rather than a burden to our members. To this end we use dues, royalties, sales, and we solicit contributions and grants from members and others. We have recently expanded our committee structures to bring in more members from both the US and Europe as we recognize the great pool of talent that exists in our school. The Tai Chi Foundation has a hands-on board with full financial transparency dedicated to helping all who seek to learn and share the benefits of this timeless art.

Financial Governance

TCF's annual budgeting process is tasked to the Finance Committee. Our process is to examine the current annual incomes and expenses, see what one-time events took place or what trends started or ended, and create the budget for the next year accordingly. It then goes to the TCF Board for ratification. This data includes the annual totals for various trainings' income and expense transactions. The actual training events are each budgeted by their local organizers, who submit their proposed budget to the Finance Committee who then examines and accepts it (or recommends modifications), and sends it to the Board for ratification.

Financially, our current situation is positive and we are confident in our future sustainability. TCF has made a modest profit over the past two years (following a loss three years ago) and we look to the future and our financial viability with cautious optimism. See Financials section below for further details. Attendance at recent annual trainings has been quite robust, particularly in Europe and our overall membership (and therefore, dues income) appears to be stable.

Until about a year ago, TCF organized its finances on a fiscal-year basis (Oct. 1st to Sept. 30th). We now operate on a calendar-year basis (Jan. 1st to Dec. 31st).

In summary, even in light of the COVID-19 situation and notwithstanding other unknown events, TCF's current financial health seems stable. However, we want to establish an Operating Reserves Fund (one year of revenue) as a long-term goal, to ensure that the organization is protected if/when there are circumstances beyond our control such as event cancellations (as we have seen in the summer of 2020).

Goals and Objectives

We have identified 5 high level goals that will provide the strategic focus for TCF over the next 3 years and beyond. These goals are broken down into clear objectives with associated measures of success. The TCF Board will track progress on a periodic basis and report annually.

Goal 1: Ensuring Teacher Quality

Ensure there is clear demonstrability that our teachers/apprentices are trained to consistent, high standards that reflect our mission, beliefs and values.

Objectives:

- I. Implement a formal teacher certification process for the core curriculum by June 2021.
- II. Ensure all levels of qualified apprentice-teachers desiring certification are evaluated and formally certified by TCF by end 2022.

Measures:

- I. Board approval of the certification process - Sept 2020.
- II. The number/% of apprentices certified - Oct 2020 onwards.

Progress and Comments:

One of the strengths of our school is that we ensure high quality and consistency of teacher proficiency through annual one-week winter trainings in key locations that are led by senior teachers.

Certification is a more formal reflection of what TCF already does in recognizing highly trained teachers who are qualified to be hired and teach in all types of corporate and community-learning settings. The certification project progressed in 2019 through the Internal Affairs Committee and is due to be re-launched in 2020.

Goal 2: Ensuring Curriculum Quality

Demonstrate that we transmit Tai Chi through consistent, high quality processes that preserve the essence of our lineage, reflecting our mission, beliefs & values.

Objectives:

- I. Continue to oversee ongoing curriculum development.
- II. Review the curriculum and deliver a revised version.
- III. Continue support of Legacy Holder dialogue and leadership.

Measures:

- I. 1st meeting of curriculum working group - by July 2020.
- II. Board approval of revised curriculum - Dec 2020.
- III. Financial support and budgetary planning for 6 monthly legacy holder development meetings evidenced.

Progress and Comments:

Our curriculum is the foundation of how we transmit Tai Chi and has direct lineage back to Professor Cheng Man-Ching via our senior teachers (Legacy holders) and Patrick Watson. We aim to preserve this transmission while updating our methods in light of our ongoing experience and learning.

We are in the process of some significant revisions to our curriculum and are formally rolling out these changes at upcoming trainings.

It is crucial that our most experienced and senior teachers continue to learn and develop, to the benefit of the evolution of our schools and we remain committed to support them in doing this.

Goal 3. Supporting our Schools

Support all of our teaching locations in their transmission of Tai Chi to the public.

Objectives:

- I. Continue to financially underwrite trainings while performing financial due diligence.
- II. Continue to financially support legacy holders and senior teacher visits to smaller/regional/underserved locations

Measures:

- I. Financial support and budgetary planning for all trainings is evidenced. Number of attendees are captured and Profit & Loss (P/L) of each visit is reported with the aim of ensuring ongoing sustainability, profit and growth.
- II. Financial support and budgetary planning for a rolling 6-month plan of site visits is evidenced. Number of attendees are captured and P/L of each visit is reported. All visits are publicized via the

Progress and Comments:

Our Winter and Summer Trainings are the focal point for teacher and student learning and a key generator of income for our schools. We are committed to ensuring that they succeed in a financially healthy manner.

We recognize that the financial health and continuous learning of all of our schools directly contributes to the success of our Mission. We aim to provide support to all of our affiliated schools, especially where they are small and potentially have a more financially marginal existence.

Goal 4: Expanding our Knowledge

Continue to evolve the school by generating new knowledge, learning from others, reaching new people and expanding our curriculum.

Objectives:

- I. Develop and implement a 'therapeutic model' to improve connections to populations with health needs
- II. Expand our understanding and experience of other teaching schools and individual teachers outside our school in order to learn from others.
- III. Setup a research working group to develop our understanding of Tai Chi research and practice.
- IV. Incorporate more innovative trainings to complement the core curriculum and ensure quality of teaching.
- V. Develop and publish a guide/summary of all TCF approved trainings that complements our 'core' curriculum and implement an ongoing process for incorporating new innovations that ensures consistency and quality.

Measures:

- I. Submit a feasibility study for the therapeutic model by Nov 2020 with the aim of implementing by June 2021.
- II. Create a summary of learnings from other schools on the TCF website.
- III. Complete a literature search by June 2021 and publish a summary paper of results on the TCF website. Update at least annually thereafter.
- IV. Include new material in curriculum/certification by Dec 2021.
- V. Publish a guide by December 2020.

Progress and Comments:

We are committed to innovating new ways to offer and teach Tai Chi in order to meet our aim of serving the sick, the stressed and the well. Different methods and techniques may be appropriate to the very sick or the elderly and we are developing a broader curriculum that complements our traditional 10-week evolutionary programs (e.g. Roots and Branches).

We also aim to be more at the center of new research and innovation around Tai Chi to better understand and communicate the growing evidence base of health benefits.

Goal 5. Growing our Membership

Continue to grow through increased student/apprentice numbers; TCF membership; and grant support.

Objectives:

- I. Clarify and improve our service offering (e.g. review the type of membership we offer and our current membership benefits) in order to retain existing members, attract new members and become better known as a school.
- II. Work with our affiliate schools to encourage an increase in the number of students, apprentices and TCF members from all age sectors.
- III. Access external grants and improve connections to populations with health needs including caregivers.
- IV. Develop an online teaching program to improve access to and reach of our school.

Measures:

- I. Complete a membership benefits & communications review by Dec 2020. Implement improvements by June 2021 (These should include better leveraging of social media).
- II. Grow affiliate, apprentice and TCF membership by 10% in each of the next 3 years.
- III. Identify and apply for three suitable grants by June 2021 and establish 3 projects with community organizations.
- IV. Creation of a sustainable online teaching facility by Dec 2020.

Progress and Comments:

We recognize that there is a major opportunity to tap into the growing public awareness of the mind-body-spirit benefits of Tai Chi. We want to be active advocates and to offer a broader range of entry points into the art. Our ability to leverage social media is key to this.

Appendix 1: Objective Planning Template.

The template below will be used to summarize and track the more detailed plans to achieve the goals and objectives and our proposal for the next 3 years (2020 - 2023). The aim is to review and update these objectives annually.

Ref	Goal/Objective	Plan to Achieve	Lead
-	-	-	
-	-	-	
-	-	-	
-	-	-	
-	-	-	