



Strategic Assessment

Findings and Recommendations Report

April 7, 2023

Rationale for this Process:

This is a time of significant transition for the Insight Meditation Community of Charlottesville (IMCC). IMCC is moving from a founder-led organization to an organization with more inclusive governance and leadership structures, teachings, and practices. Diversity, equity, inclusion, and justice (DEIJ) and racial equity are centered and infused throughout this process so that IMCC's organization, governance, practices, and culture will reflect their Buddhist teachings and values.

To support this transition, IMCC undertook a sangha-wide strategic assessment to inform a strategic visioning and planning process to re-envision IMCC's mission and aspirations and then create governance and leadership structures that reflect that reimaged vision and mission. This process was co-designed and facilitated by consultant Katherine Turner, President of [Global Citizen, LLC](#), in close collaboration with IMCC's Strategic Planning Committee members Sarah Adams, Philip Dupont, Susan Kaufman, Marylouise Kelley, and John Wilson, with significant engagement and input from sangha leaders and the entire community from September 2022 - April 2023.

Methodology

The consultant and the IMCC Strategic Planning Committee conducted a comprehensive strategic assessment, and this report presents the findings and recommendations. Direct quotes are included to illustrate key findings and bring in community members' voices and perspectives in their own words. DEIJ content and themes are integrated into all four of the themes.

The assessment included the following components:

- **Document Review:** The consultant reviewed IMCC's current bylaws, background documents, and other artifacts provided by the Strategic Planning Committee.
- **Observations:** The consultant observed organizational processes.
- **Interviews with Other Sangha Leaders:** The Strategic Planning Committee conducted interviews with leaders of other sanghas on their DEIJ and racial equity-centered strategic planning processes and organizational structure, governance, practices, and culture and analyzed the key findings.

- **Focus Group Discussions (FGDs):** The consultant conducted six virtual focus group discussions (FGD) with diverse sangha members about their perceptions and experiences of IMCC and hopes for IMCC’s future. In consultation with the Strategic Planning Committee, the following focus groups were selected:
 - Board members
 - Guiding teachers’ council (GTC) and teachers
 - Noon sit participants
 - All sangha members
 - Hearing Ethics and Reconciliation (HEAR) Council
 - Young adult sangha
- **Confidential Comments:** The consultant provided a Google form that only she had access to and invited all sangha members to contribute their confidential comments throughout the engagement.

Strategic Recommendations

The following are overall strategic recommendations from all data sources to inform the strategic visioning and planning process. DEIJ are integrated into these recommendations. These recommendations will be implemented gradually, over years, as time, personnel, workload, and other factors allow.

- Revise the bylaws and vision, mission, and values to clearly define the purpose of the organization and role of leaders in terms of the dharma and DEIJ.
- Consider decisions about organizational structure, governance, and teachings in an integrated way and in alignment with the dharma and mission.
- Incorporate more balanced and inclusive leadership policies and practices that disrupt inequitable power structures, encourage collaboration and participation, advance equity, and create an intentional community.
- Develop a sustainable board and teacher leadership orientation and training program to increase competence in core nonprofit governance and operations skills and deepen understanding of the dharma and DEIJ.
- Ensure that IMCC has active, skilled teachers, as that is central to IMCC’s mission.
- Invite diverse guest teachers and provide training opportunities to develop more diverse teachers.
- Create an intentional care plan for IMCC leaders.
- Develop a fundraising plan that is in keeping with the organizational mission and values and will meet organizational and programmatic priorities.
- Provide a range of offerings, including for beginners and with more informal formats, to draw in new and younger people and re-engage existing members.
- Be intentional about fostering an open and welcoming space that is accessible to beginners and with more opportunities to form personal connections.
- Provide more in-person community building activities.

- Look into securing a non-religious meeting space.
- Engage and share the dharma with the broader community.

Key Findings from the Document Review, Observations, FGDs, and Confidential Comments

The following key findings are from an assessment of the data sources listed above, and DEIJ are integrated throughout.

Theme 1: Organizational Leadership (Board Members and Teachers)

- ***Strengths***
 - Board members have demonstrated dedication by holding the organization together during the recent rupture, resilience to keep it moving forward, and courage through their willingness to change and grow.
 - Board members have demonstrated integrity, flexibility, and transparency as they have worked to create a culture of accountability, balanced power, respect, inclusion, and collaboration in the organization.
 - Leaders (board members and teachers) have a strong commitment and dedication to the practice and have worked hard to provide consistent offerings despite the recent rupture.
 - Teachers are knowledgeable, thoughtful, and prepared, and have decades of wisdom and experience to share.
- ***Opportunities for Improvement***
 - Decisions about organizational structure, governance, and teachings should be considered together and in alignment with the dharma and mission.
 - Leadership practices should follow and align with organizational policies and procedures.
 - Leaders should carefully consider how many board and Guiding Teachers' Council members are needed and develop ways to consolidate the leadership structure.
 - Leaders need to provide more routine and transparent communications with members.
 - Many members do not understand what leaders are doing behind the scenes to keep the organization operating and make the offerings possible.
 - Leaders have not been equally involved in all IMCC programs and have not always clearly communicated their leadership role and clarified how IMCC supports programs and what other programs are being offered.
 - Leaders can broadly welcome community members to step into a leadership or other volunteer role and also reach out to specific people who have expressed interest.

- Lack of adequate financial compensation can serve as a barrier for some people to volunteer for leadership roles. Leaders need to recognize that there is inherent privilege in having the resources to volunteer and carefully consider compensation as an important DEIJ issue.
- **Illustrative Quotes**
 - “I’d like to see a relaxing of the ‘shoulds.’ It’s incredible that we haven’t missed a Tuesday sit. An obligation can feel different from an energy. We can take the easy answer and move on to the next crisis. For example, how much did we apply what we learned about the [Operations Director] position after [each person] left? Sometimes it’s OK to skip what you’ve been doing so you can take a step back and take a critical look at the system...I feel like there’s low energy on the board and at Tuesday meetings. I’d like us to let go of more of the ‘shoulds’ and understand where the energy is and isn’t.”
 - “I feel that the noon sit is one sangha, and the Tuesday night sit is another sangha. I’ve never seen a board member at the noon sit. Jeffrey was our organization’s head, and he participated in the noon sit. I know the organization is there, but I don’t know the people who run it. I don’t know much about organizational operations, and I would like to know a little more. I’m glad to get the newsletter, and I have an interest in joining committees and being more involved.”
 - “Susan has been extremely courageous and full of heart in the face of adversity and reactivity. Although she never wanted to be president, she stepped up under duress, and she’s been president for one year. All of the board members are working to hold the organization steady during a major rupture, and by holding a strategic planning process, they are also trying to understand what needs to change. They have a willingness to renovate in their vision and in practice. They’ve issued an invitation to change to all of us. I deeply appreciate the people who stuck around and are willing to do the hard work.”
 - “One structural issue is that we’ve become top heavy; our board is too large. Every person is lovely, but why would a sangha of 20-40 active people on a given Tuesday or noon sit need to have so many people on the board? I feel that it’s part of that white supremacist, patriarchal emphasis on top-down structure and rules. Lately, a lot of the focus and energy is on the board and not the community.”
 - “It’s important that decision making about the organization not be separate from the teachings on the dharma. When we’re determining the future of the organization, teachers should be adequately represented on the board. That representation is currently a little weak.”

Theme 2: Organizational Structure, Governance, Policies, and Practices

- ***Strengths***

- IMCC guidelines provide a useful framework.
- The organization is rooted in Buddhisthharma.
- IMCC provides a formal structure where members can listen to and learn from the teachers and other members who have been practicing longer.
- IMCC serves a logistical and practical role as a 501(c)(3) organization with resources to offer, including a leadership structure, hosts, technology, a newsletter and other communications, and a website.

- ***Opportunities for Improvement***

- Policies need to be reviewed and revised to reflect the organization's values, practice, and culture and increase accessibility.
- The board needs to institute policies, procedures, and practices that align with the dharma and organizational values of advancing DEIJ.
- Current leaders should assess what is and isn't working with their workload and responsibilities, factor that into their decision making about volunteer leadership versus staff roles, and create an intentional care plan for IMCC leadership.
- There should be more effective ways to request donations that are in line with organizational values.
- There should be financial policies that determine the organization's spending, how the dana should be distributed, and how that is communicated to the community.
- The board needs to follow and routinely refer to the bylaws and make them available to the members.
- The organization should review their policies on who can teach to better align to DEIJ.

- ***Illustrative Quotes***

- "I find it comforting and love knowing that IMCC is there, even though I may only be able to participate once a week. It's kind of like knowing you have a friend who's there for you, even if you don't need to call them all the time."
- "For older, affluent, retired people, they can put the DEIJ policies in place, but where is the intentionality of going outside of ourselves to practice altruism in the world at large versus expecting people to come to us? These are practices that are meant for us to live consciously and step outside of ourselves. It's a reality of the cultures we live in."
- "Our policies around who can teach aren't inclusive and in alignment with DEIJ."
- "I'm not sure how well IMCC's current policies, practices, and culture align with their organizational values. What I'm gathering is that there's a gap between what's on paper and what is done, and that causes confusion. We may have on paper how we make decisions and how teachers get compensated, and our policies may align with our values, but the policy and practice don't align. We

need to go back to the drawing board and create processes and ways to hold ourselves accountable. As our organization has gotten bigger and more complex, we haven't moved away from the mom and pop operation. We may need more formality."

- "One of the breakout meeting report backs cited the need for definition: of inclusivity and transition. I echo this. It is not clear to me why pursuing the goals of DEIJ requires the organization to be in structural transition. From what to what?"
- Our bylaws were cobbled together from other organizations' bylaws. They don't reflect Buddhist principles. We agree in every board meeting to use a consensus model to be inclusive, but that isn't in our bylaws. Our policies are outdated, unclear, and out of alignment with our values.
- "I don't know what our bylaws say. Our leaders don't bring them out and communicate about them all that often."
- "Early on, there was a group of us who realized that IMCC was not only a racially-biased structure but also gender biased. The timing of the sits was not conducive for parents, and no childcare was offered. The lack of childcare is probably the largest barrier for young people. Sometimes college-aged people come, and older people, but we're missing the people of reproductive age. If we want age diversity, we need childcare."
- "I find value in IMCC because of its formality, in listening to and learning from some of the older people who have been practicing longer. If I had to choose, I would choose the young adult sangha. I've found value in the leadership development group."

Theme 3: Spiritual Teaching, Sits, and Other Offerings

● *Strengths*

- Our teachers are loving and wise.
- There is a consensus of IMCC's primary role of sharing the Buddhadharma and offering spiritual guidance.
- Recorded and archived talks are valuable resources for people who were unable to attend or to refer back to later.
- Virtual offerings reduce barriers of access and offer flexibility to people who have time, cost, transportation, and other restraints.
- Participation in one program provides exposure to the larger sangha and welcomes people's participation in other programs.
- The programs provide members with different opportunities to practice and learn. This gives members the autonomy to decide which combination works best for their individual practice.
- The regularity and consistency of offerings make them more accessible to members.

- **Opportunities for Improvement**

- Teachers and hosts should more consistently provide information on other IMCC offerings at every event. IMCC could provide guidelines to leaders and hosts of groups with consistent language to welcome new and returning members, express that IMCC is glad they are participating, and remind everyone that the programs are part of IMCC.
- IMCC should consider right-sizing the number and type of offerings that are commensurate with organizational resources and leadership and other volunteer energy levels.
- A dedicated technology expert at Tuesday evening sats would troubleshoot technological issues, which may also help with integration and interaction among the in-person and virtual participants.
- IMCC could offer more introductory-level groups and informal practice groups to bring in people who are new to the practice.
- IMCC should provide programs with direction to create a structure or curriculum to meet a certain standard while also allowing flexibility to incorporate change and growth, as needed.
- Offerings should include a variety of styles that appeal to different audiences that range from the traditional teacher-student dynamic to a more collaborative approach. Some people prefer to be more of an observer than an active participant.
- IMCC should lean into the Leadership Program to provide training for members to be empowered as teachers.

- **Illustrative Quotes**

- “I appreciate that the teachers are inclusive as well. There’s an intention to expand and grow in a wholesome way. I love that [certain teachers] are teaching and breathing new life into old dharma. We have the sangha leadership cohort, a new program to involve more sangha members to grow into leadership positions in the sangha.”
- “Everyone is really smart. I like that a lot. To get people to contribute more would be an important opportunity. Kudos to the board for keeping everything going. Zoom is an unsatisfactory experience for me, but I think it’s important that we offer it. One great thing the board did was find us a great place to meet – at UU. It’s a big room that’s less than half filled. Even if people want to stay distanced, there’s room for that. Sangha is an important part of practice. Without a bigger group in person, it feels like the community aspect is waning. Full respect to people who feel the need to stay remote. We could encourage people to come in person.”
- “Sometimes what keeps me from participating in other programs is the lack of a structured program. I can sit and meditate on my own. The dharma talks have

great topics. I'm looking for a glue like a curriculum that holds the program together."

- "I imagine that there may be a privacy issue. You're put in small Zoom groups, and suddenly you're on, no matter how you're dressed, and you're expected to participate. Some people want to participate more as an observer, not actively."
- "I now participate in the noon sit because I live far away. The noon sit isn't an independent group; it's part of IMCC programs. We become familiar and connected with the people in our group. There are smaller sanghas and then there's the overall sangha. Being in one has made me want to participate in other programs. I also participated in a virtual course offered over several months. Even after the fact, we can participate by listening to the recordings."

Theme 4: Community and Culture

- ***Strengths***

- The high level of participation in this strategic assessment process is an indication of strong community engagement in the organization.
- Participants have a strong affinity and sense of community within their groups/smaller sanghas.
- IMCC provides a lot of offerings, but nothing is expected of the members, which makes it welcoming yet flexible.
- People who are dedicated to serving feel a sense of connection and community through their service.

- ***Opportunities for Improvement***

- Organizational leaders need to intentionally create a culture of welcoming and belonging so that people at any point in the practice continuum feel included and part of the organization. It shouldn't be an expectation that people have to participate in other programs to feel welcomed.
- Leaders should incorporate a practice of humility to foster connection and so that people feel less intimidated.
- Some members felt that IMCC would benefit from more informality within the organization.
- IMCC could address structural barriers such as child care and time to address personal needs and work on increasing the diversity of the sanghas so that people with different identities feel welcome and not alone.
- Organizational leaders need to create more opportunities to help people who are participating in one practice group to feel connected to people in the larger organization and the organization itself, such as a regular in-person social event.
- A culture of "should" is a strain on people's ability to participate at the level with which they are comfortable.

- Incorporating a moment in programs where participants are encouraged to reach out and connect with each other could help build a foundation of community with new members.
- **Illustrative Quotes**
 - “I hadn’t given any thought to the relationship of the young adult sangha (YAS) as part of IMCC and how complicated it becomes when we think of ourselves in relation to the larger sangha. People have tried to delicately articulate why YAS is needed. YAS was welcoming and felt authentic. That wasn’t my experience of IMCC. I’d like to go back and see how I experience IMCC now. It’s hard to create an intentional community that really knows each other. How do we protect our YAS community while participating and integrating more with IMCC.”
 - “I go to Tuesday sats regularly, but it feels hard, like a ‘should,’ because it will be good for me. Everyone is so nice. I feel appreciated and welcomed. With Zoom, it felt like a Zoom space. At the church, it feels kind of empty, a sadness, an eagerness. I feel compassion. I don’t know how we can change that. The hybrid experience hasn’t helped. It’s like being at a party but you don’t know who else is there and who may be looking at you. Having the teacher up on a stage creates a distance. The teachers are wonderful. The energy doesn’t feel quite right.”
 - “I go to Tuesday nights occasionally, but Tuesday nights are tough for me. It feels like joining a dying community. Even at work, we’ve given up on hybrid. If we alternate between in person and virtual, we can still have the experience.”
 - “One of the things this group has talked about is the benefit of circle sitting. When we’re invited to share, we can go around or popcorn. That circle structure allows more balance than when one person is up on a stage with a microphone.”
 - “The Insight Meditation Center in Redwood City, California has what we might call a separate socially interactive sangha session, led by trained small group facilitators. There isn’t a meditation or dharma talk. It’s just full group interaction for 60 minutes or more. The special self-selected group has been meeting for some time. The core group are both very comfortable with each other and extremely welcoming to newbies.”
 - “If there is a generational experience of wanting to take in information directly, like a more traditional teacher teaching a class, versus a more collaborative and flow approach. If people want that kind of learning, that’s valuable too. I value the older approach and our more collaborative approach in the YAS. I’ve been wondering what other sanghas are doing.”
 - “For a group that’s concerned about DEI, we don’t manifest them well within the sangha. On occasion, people of color will come to a Tuesday night meeting, but they don’t come back. We have diverse teachers joining us, mostly thanks to Liz, but we haven’t excelled in bringing in teachers with different backgrounds.”

Key Findings from the Strategic Planning Committee's Interviews with Other Sangha Leaders

Theme 1: Organizational Leadership (Board Members and Teachers)

- The BOD needs to be intentional about what expertise is needed and who is invited to serve on the board.
- There is the need for a sustainable leadership orientation and training program to increase competence in core nonprofit governance skills and DEIJ.
- There needs to be an intentional program to develop prospective board members.
- Leaders need to remain open and receptive to members' desires while balancing them with the overall organizational needs and resources.

Theme 2: Organizational Structure, Governance, Policies, and Practices

- IMCC's transition from a founder-led to a more inclusive structure is very common among insight meditation communities, and these transitions often take a long time.
- The relationship between and roles of the board and teachers need to be clarified, in terms of: structure, governance, and communications. For example, the board has responsibility for administrative and operational decisions, and guiding teachers are responsible for teaching decisions such as who teaches and what is taught.
- The board may need to transition from a working board to a governance board.
- The board could create a committee related to governance and operations.
- The Guiding Teachers' Council could transition to a Teachers' Council of all currently active teachers who decide by consensus on teachings, programming, etc.
- There could be smaller sanghas that are all organized within the central sangha.
 - Leaders will need to address the question of how to reconcile different sanghas' memberships, cultures, practices, needs, and desires.
- There is the question of different teacher models and governance processes, such as: teacher-centric versus sangha-centric.
- There are benefits to having an executive director position for the organization.
- IMCC needs to assess the organization's financial needs and develop and implement a more sophisticated fundraising plan and also set specific fundraising goals and plans for specific needs, such as a building fund.
- Loss of financial support after going virtual/hybrid is a systemic problem affecting insight meditation communities.

Theme 3: Spiritual Teaching, Sits, and Other Offerings

- The issue of how to compensate teachers in an equitable way is an important one with DEIJ implications.
- Having active, skilled teachers is central to insight meditation communities' missions.

- There needs to be an intentional plan and process to develop diverse, new teachers, including a middle ground teacher level.
- The question of in-person, virtual, and/or hybrid programs needs to be decided.
- It is important to emphasize different teaching formats. Not everyone is served by the traditional silent meditation and dharma talk.
- Adding BIPOC guiding teachers and teachers who are dedicated to antiracism work has increased diversity and spawned the creation of a BIPOC online sangha.
- IMCC could offer regular programming to welcome and include newcomers, including:
 - Newcomers retreats
 - Special roles for young people
 - Dharma weekend potlucks

Theme 4: Community and Culture

- Insight meditation communities share many struggles with DEIJ efforts. Solutions are not easy, and there are not many long-lasting successes.
- Some sanghas are taking the dharma out into communities rather than expecting more diverse members to join them.