



Asheville Insight Meditation

# Strategic Plan

August 2015 – December 2018



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## Introduction

In March, 2015, Ronya Banks, Director of Asheville Insight Meditation (AIM), held a general meeting to discuss the challenges presented by the increasing number of participants in AIM programs in terms of the current facility's space limitations. At this meeting, the AIM Strategic Planning Committee was created and charged with the task of developing a three-year Strategic Plan to meet these challenges. This plan was completed and presented to the AIM Board of Directors for approval in August, 2015. The Strategic Plan has been reviewed by an attorney to ensure compliance with Organizational By-Laws.

Although the immediate incentive for development of a strategic plan was the space limitations of our current facility, this Strategic Plan goes well beyond this particular concern to address all facets of AIM's future development and mission.

The Strategic Plan is intended as a living document to which all participants in the AIM community may contribute through their feedback and input. Therefore, suggestions, criticisms, and proposals for modification of this document are welcomed. A general community meeting was held to solicit feedback from all interested parties on the plan. The Strategic Planning Committee recommends an annual review and an update of this Plan in 2018 prior to its expiration in December of that year.

### Strategic Planning Committee Members

Kate Freeman, Ronya Banks, Michael Scardaville, Trish Rux, Ken Cooper, Gwen Boyd with support from: Mary McKenzie, Mark Threlkeld, and Suzanne Hahn.

## History

*"To know your future, you must know your past" ~ Margaret Jang*

Asheville Insight Meditation (AIM) is a relatively young organization. In September of 2010, Ronya Banks began leading a weekly meditation group in the Women's Wellness Center – with an average of 3 to 10 participants per session. The name Asheville Insight Meditation was chosen for the group and 501 (C) (3) Non-Profit status was applied for and received in the summer of 2012.

By the fall of 2012, AIM's growth to 20 or more participants had outgrown the capacity of its meeting space at the Women's Wellness Center, and a larger space was needed. Current donations, however, were insufficient for the higher rent that this would entail. So to meet this financial need, the Core Membership program was created. This involved soliciting ongoing monthly donations of \$10 - \$100 per month. Eighteen people signed on as Core Members, generating sufficient funding to move into our current, larger space at the Professional Building at 29 Ravenscroft, Suite 200, in October 2012.



The new, full-time facility greatly enhanced the dynamics of the group, enabling expansion of its schedule of meditation and community events, including morning and afternoon open sats, morning Buddhist chanting, two Sunday sessions, the Buddhist book club, a movie night, various classes such as Introduction to Mindfulness, and a Facilitators' Training Program.

In the last three years support has grown to 48 Core Members within a thriving and actively engaged meditation community, but due to the significant growth, we are once again faced with the financial challenge of seeking a larger and more expensive space. There are also noise and parking issues associated with our current meeting space which are incentives to seeking a new and larger facility. The Strategic Planning Committee was created to meet this challenge and the results of its efforts are contained in this 3-year Strategic Plan document.

## Purpose

Asheville Insight Meditation provides a community that inspires the cultivation of compassion, generosity, wisdom, peace, and spiritual growth.

## Mission

Asheville Insight Meditation is a dharma without the dogma meditation center and community. We nurture and support the teaching and continuing practice of Insight Meditation and its mindful integration into daily life.

## Vision (Three Years)

Asheville Insight Meditation is a welcoming and self-sustaining meditation center that offers innovative mindfulness programs and Buddhist teachings to an engaged and culturally diverse community.



## Values Statement

Asheville Insight Meditation will operate as a community with the following values as a foundation for decision-making:

Open	Accessible	Respectful	Ethical	Safe	Aware
Diverse	Visionary	Hospitable	Accountable	Transparent	Insightful
Non-sectarian	Spiritually Intimate	Community-oriented	Motivational	Intuitive	Supportive

## Guiding Principles

### Sangha/Community

Asheville Insight Meditation promotes a learning community of spiritual companions to offer support and refuge for each other's practices.

### Diversity

While acknowledging that insight meditation is rooted in Buddhism, Asheville Insight Meditation welcomes new and experienced students from all contemplative and spiritual traditions. AIM makes both classical and modern Buddhist teachings (particularly in the Theravada tradition) available to all who seek them.

## Spiritual Path

We recognize that this spiritual path has many dimensions, including the following:

Exploration	Compassion	Generosity	Morality/Ethics
Investigation	Clarity	Service	Gratitude
Concentration	Equanimity	Loving Kindness	Personal Responsibility
Insight	Wisdom	Joy	Integrity



## Evolution

Asheville Insight Meditation is a non-profit volunteer organization that encourages participation and involvement. While AIM has a leadership board, our positive momentum and evolution are dependent upon the generosity, volunteerism, and service of those who come to our center.

## Ethical Guidelines

We seek to be a respectful and compassionate community that intends no harm to others or ourselves through speech or actions. We understand that conflicts may arise, and we are committed to dealing with them mindfully, compassionately, and constructively.



## Organizational Structure

As a 501 (C) (3) organization, Asheville Insight Meditation is a volunteer-based, membership organization governed by a duly elected Board of Directors. In order to implement the goals outlined in this Strategic Plan, the Planning Committee recommends the creation of the following committee structure with the specific program responsibilities indicated under each committee heading:

### Membership

- Greeting
- Membership Recruitment
- Member Support
- Member Input
  - Member Suggestions
  - Survey of Members
- Volunteer Coordination

### Finance

- Accounting
  - Budgetary Planning
  - Bookkeeping
- Core Member Program
- Fund-Raising

### Communications & Outreach

- Newsletter
- Social Media
- Advertising/Promotion
- Strategic Alliances
- Community Engagements
- Community Service Projects
  - Charitable Organization Support
  - Radio Show on Buddhism & Recovery

### Programs

- Meditation
- Talks
- Guest Speakers
- Courses
- Vegetarian Potlucks
- Movie Night
- Facilitator Training Program
- Committee Coordinator Training
- Retreats
- Musical Events
  - Tibetan Bowl Concerts
  - Buddhist Chanting
- Book Club
- Social Activities

### Resources

- Library
- Technology
- Facilities
  - Equipment & Maintenance
  - New Facility Search



## Goals and Objectives

What follows is the Strategic Planning Committee's recommendations for implementation of specific programs and policies which will enhance Asheville Insight Meditation's mission. The intention is to bring to fruition these goals and objectives as fully as possible and as soon as possible within the limitations of financial budgetary constraints. AIM's Board of Directors will exercise oversight and active engagement in the enactment of this Strategic Plan, which will be implemented by the five volunteer committees described above. Consequently, these goals are set forth here in terms of the organizational committee structure.

### **Membership Committee Goals**

#### A. Greeting

- Recruit and train greeters for sangha events.

#### B. Membership Recruitment

- Develop a tracking system for visitors and potential Core Members, recording the number of visitors and core members per month, average size of donations, number of volunteers, etc.
- Have sangha leaders encourage participants to invite friends, family, and other interested persons to the programs.
- Hold quarterly Core Member meetings with specialized themes.

#### C. Member Support

- Design and implement a system that will allow for providing direct, non-financial support to sangha members. This may include such things as helping to care for sangha members who are ill, assisting them in an emergency, or providing for some other need they may have for the community's support.

#### D. Member Input

This subcommittee is responsible for both Member Suggestions and Surveys of Members.

- Provide a physical and website suggestion box.
- Appoint a volunteer to monitor, manage, and respond to suggestions.
- Survey the community each year in October to ensure that needs are being met and opportunities explored, as well as presenting the survey results to the Board within 60 days of survey completion.

#### E. Volunteer Coordination

- Identify responsibilities of a Volunteer Coordinator and appoint someone for this position.
- Recruit volunteers for all committees to assist coordinators.
- Recruit 1 or 2 backup volunteers for every critical job.
- Develop and maintain a master list of primary and back-up volunteers and publish it online so it is always available (with limited access).





- Maintain a record of the amount of time put in by volunteers.
- Express volunteer appreciation on the website and/or newsletter.
- Organize at least annually a volunteer appreciation event.
- Periodically assess and discuss how to keep volunteer opportunities meaningful and engaging

#### F. Board of Directors

- Identify skill sets required for a well-balanced Board.
- Assign someone to introduce potential Board Members to the Director, Ronya Banks.

#### G. Building a Healthy Community

- Develop a code of conduct for the AIM community based on the concepts of *Right Speech* and *Right Action* as defined in the Buddhist *Eightfold Path* and make it available on the website, at the meditation center and through reminders at appropriate times.
- Have an attorney review the By-Laws to ensure they reflect the current state of the organization and are consistent with the Strategic Plan.

#### H. Committee Management

- Recruit a Committee Coordinator to supervise the committee's implementation of organizational goals, maintain a list of committee members, and seek replacements as necessary.

### **Finance Committee Goals**

#### A. Accounting

This subcommittee is responsible for both Budgetary Planning and Bookkeeping.

- Develop an annual budget.
- Determine the cost of hiring a bookkeeper.
- Recruit a volunteer or paid bookkeeper.
- Provide financial report to Core Members at the annual meeting.
- Post a financial report on the bulletin board biannually.
- Consult a tax preparer to determine tax liability and implement proper tax-paying procedures.
- Develop the means of providing a salary to Director Ronya Banks, commensurate with her responsibilities.

#### B. Core Member Program

- After determining the amount needed, request an increase in Core Member contributions to cover the cost of facility rental from October 1 - December 31, 2015.
- Determine the amount of annual financial support required from current Core Members to support and maintain a new venue in 2016 and to cover total budgetary needs.
- Make sure Core Membership sign-up forms are available at the on greeters' table
- Hold an open monthly Core Membership meeting to educate and answer questions by potential Core Members.



### C. Fund-Raising

- Create and make available one-time tax-deductible donation envelopes for cash, check, or credit card donations at all program events.
- Solicit people to pledge payment for specific budgetary items (e.g. paying the electric bill for 1 month).
- Develop a “Wish List” of needed items and invite members to donate these items. Publish this Wish List on the website and in the newsletter.
- Consider utilizing direct mail fundraising at least annually.
- Work with the Membership Committee to explore offering different levels of paid and unpaid memberships without suggesting a ranking of members.
- Utilize an internet application (e.g., iGive) so that people can contribute to the sangha through purchases at online businesses.
- Develop a strategy to identify and approach potential sponsors/benefactors to pay recurring and one-time expenses.
- Explore the possibility of creating a Kickstarter, GoFundMe or Indiegogo account to obtain funding for specific needs.
- Explore the possibility of creating a Planned Giving program.
- Provide input to the Board to undertake a study of the feasibility of purchasing a building or buying a lot and building a new building. The study should address the issues of potential purchase cost, possibility of securing a mortgage or construction loan and the cost of utilities and upkeep. It should also attempt to identify potential large donors and assess risk factors associated with such a purchase or building construction.
- If the acquisition of a building is deemed feasible, develop a strategy to create a building fund campaign, request preliminary drawings of a new building from an architect, and assign to the Facilities Search Subcommittee of the Resources Committee the task of beginning the process of seeking available lots and/or buildings.

### D. Committee Management

- Recruit a Committee Coordinator to supervise the committee’s implementation of organizational goals, maintain a list of committee members, and seek replacements as necessary.

## **Communications and Outreach Committee Goals**

### A. Newsletter

- Expand the current weekly newsletter to include community member life events and volunteer activities.

### B. Social Media

- Identify ways to capitalize on social media (e.g., Insight Timer, Twitter, Facebook, LinkedIn, Instagram, etc.).
- Develop a regularly updated blog and invite guest bloggers to author posts.



- Identify other talented web designers within the community who can support the current volunteer.
- Identify the components and cost of providing live audio-video streaming on the website.
- Optimize website design using the Stats function of WordPress or Google Analytics.
- In consultation with the Technology Subcommittee of the Resources Committee, ensure sufficient skill to maintain and extend web presence and content.
- Recruit volunteers to keep the website refreshed and up to date, including external partnership links.

#### C. Advertising/Promotion

- Identify optimal marketing materials to purchase.
- Develop flyers, brochures, pamphlets, etc. for distribution at various locations, including schools, colleges, health-related and sustainable development businesses
- Place ads in local publications.
- Identify key supporters who might recommend AIM to potential member-donors.
- Gather additional marketing data from current sources (e.g., Greeters' log).
- Contact the Chamber of Commerce to identify other opportunities to welcome Asheville newcomers to the sangha (Visitor's Center, distributing pamphlets, etc.).
- Supply brochures to information centers, such as the Chamber of Commerce.
- Review local and regional publications, events, and announcements for speaking opportunities for AIM Director Ronya Banks.

#### D. Strategic Alliances

- Contact Southern Dharma Retreat Center and offer to inform our members of their need for volunteers.
- Connect and network with Insight Meditation Societies in Barre and Spirit Rock, NC; local Vipassana sanghas in the Carolinas and neighboring states; and the Osher Lifelong Learning Institute (OLLI), the Meditation Society, and the Mindfulness Event Coordinator at UNCA.

#### E. Community Service Projects

- *Charitable Organization Support:* Undertake volunteer community service projects in accordance with our value of compassionate service, as approved by the Volunteer Coordinator of the Membership Committee.
- *Radio Show on Buddhism and Recovery:* Develop and implement a radio program on topics related to the application of Buddhist principles and practices to the field of addiction recovery.

#### F. Community Engagements

The overall scope of this subcommittee is yet to be determined. The vision is to build healthy relationships with other groups in Western North Carolina by having AIM representatives make presentations to such groups about AIM's mission and programs.



### G. Committee Management

Recruit a Committee Coordinator to supervise the committee's implementation of organizational goals, maintain a list of committee members, and seek replacements as necessary

## **Programs Committee Goals**

### A. Existing Programs

- Continue to provide the programs that are currently well-received as outlined on Page 7 "Organizational Structure/Programs" above.
- Create, where needed, training programs for Committee Coordinators and volunteers.
- Introduce an orientation session from 6:30 – 6:45 p.m. on Thursday evenings for newcomers unfamiliar with Insight Meditation.
- Recruit and schedule morning chanting leaders.

### B. Possible Future Programs

- Design a course or workshop to support those who feel "stuck" in their practice.
- Explore the possibility of creating and implementing the following new programs:
  - Targeted group meditation events (LBGTQ, children, families).
  - Non-Buddhist meditation events (mindfulness-based stress reduction, focused awareness).
  - Tea nights.
  - Blessings/Weddings/Life Events.
  - Multiple daily open sits.
- In cooperation with the Membership Committee, survey community members to determine the level of interest in proposed programs.

## **Resources Committee Goals**

### A. Library

- Encourage member donations of books and other materials and renewal of current magazine subscriptions.
- Encourage use of the current library on the website.
- Maintain and update the current library.

### B. Technology

The overall scope of this subcommittee is yet to be determined. The vision is to ensure that all technology needs are up to date and adequate for AIM's programs, including:

- Install Skype capabilities to connect with teachers and other meditation centers and spiritual leaders around the world.

### C. Facilities

This subcommittee is responsible for both Equipment & Maintenance and New Facility Search.

- *Equipment & Maintenance*



The overall scope of this subcommittee is yet to be determined. The vision is to maintain and optimize our current facility until such time as we can transition to a larger and more suitable facility.

- *New Facility Search*
  - A new facility must meet the following minimal criteria:
    - Affordable
    - Professional, quiet, peaceful, aesthetically pleasing
    - Sufficient space to accommodate Thursday/Sunday meditations & special events, while providing room to grow
    - Chemically-free
    - Handicapped access
    - Ample free parking
    - Easy access/egress
    - Room for a library
    - Access to a kitchenette
    - At least 2 bathrooms
    - More than 1 room to accommodate training and other activities, such as offering a venue for recovery groups (AA/NA) or accruing additional income through rental
    - Coat room with shoe rack
    - Ample natural light from windows
  - If buying or building, create a search team responsible for identifying an existing building that meets the above criteria or a suitable lot for building a new building.
  - If renting, create a search team to locate a new venue for rent that meets the above criteria and begins with the expiration of the current lease in October, 2015.
  - If remaining at the current location:
    - Determine the length of time we wish to remain in the current facility and create a search team responsible for locating a venue to buy, build, or rent which meets the above criteria and would begin at the conclusion of the current lease.
    - Continue to maximize present space potential and determine the cost of hosting special events in a separate venue that will support 25-100 people.

#### D. Committee Management

- Recruit a Committee Coordinator to supervise the committee's implementation of organizational goals, maintain a list of committee members, and seek replacements as necessary.



## Addendum

The following are suggestions for possible additional “Action Items” to be included in their respective places, as noted, in the “Goals and Objectives” section above. Each committee is encouraged to review these suggestions for possible inclusion.

### Membership Committee

- *Membership / Greeting:*
  - Greet and welcome new visitors and orient them to AIM meditation sessions.
- *Membership / Membership Recruitment:*
  - Utilize mandatory sign-up sheets at all sangha events with e-mail and phone number.
  - Send follow-up communication to new visitors to provide them with more in-depth information about AIM and to address any concerns or questions.

### Finance Committee

- *Finance / Accounting:*
  - Prepare monthly financial statements that detail AIM’s financial health and report these findings to the Board of Directors and other interested parties.
  - Verify that the budget is being followed in accordance with the financial plan.
  - Provide proper money-handling suggestions and maintain a financial logging and tracking system for incoming donations.
- *Finance / Core Member Program:*
  - Educate non-member attendees about the value of Core Membership and encourage their participation.
  - Develop and maintain regular communication with current Core Members to ensure their satisfaction with AIM and to address their concerns.
  - Encourage current Core Members to consider increased financial contributions or volunteer participation where possible.
- *Finance / Fund-Raising:*
  - Develop the means to facilitate bequests to the sangha in people’s wills.
  - Appoint and oversee the activities of a fundraising coordinator.

### Communications and Outreach Committee

- *Communications and Outreach / Social Media:*
  - Collaborate and share communications and outreach information with AIM’s Web Designer.



- *Communications and Outreach / Advertising/Promotion:*
  - Develop a comprehensive list of local media with contact people.
  - Develop a more specific description of our lineage in the Buddhist tradition and the branch of Buddhism with which AIM is most aligned.
  - Create a unique and clearly recognizable identity for AIM that distinguishes it from all other Buddhist groups.
  - Consider setting up an AIM kiosk table up at all Asheville festivals and other public events to acquaint the public with AIM's core community values.
- *Communications and Outreach / Community Engagements:*
  - Seek out and create opportunities for AIM's Guiding Teacher to lead meditations and give Dharma talks.
- *Communications and Outreach / Strategic Alliances:*
  - Network with other Buddhist groups in Asheville.

### **Programs Committee**

- *Programs / Existing Programs:*
  - Survey community members to determine the level of interest in existing programs.
- *Programs / Possible Future Programs:*
  - Consider creating a Travel Club.
  - Consider creating a class on politically engaged Buddhism.

### **Resources Committee**

- *Resources / Library:*
  - Create a recordkeeping system for borrowed books, videos, etc.
- *Resources / Technology:*
  - Research and decide upon the appropriate technological devices needed for AIM's various programs and activities.
  - Oversee the set-up, usage, storage, and maintenance of technical equipment.
  - Troubleshoot any technical difficulties with technological devices.
  - Institute the following technological systems as needed:
    - P.A. system
    - Video recorder system to record sangha gatherings
    - Streaming software and equipment to live-stream classes and events
- *Resources / New Facility Search:*

Consider adding "*centrally located in Asheville*" as a criterion for new facility.