



Southern Dharma Retreat Center
2019-2024 Strategic Plan

Approved by the Board of Directors
February 18, 2019

Vision

To support those who seek wisdom, compassion, and awakening through direct experiences that lead to a transformation of heart and mind for the benefit of all beings.

Mission

To support the transformation of hearts and minds

- by providing a place of refuge and a sacred container for spiritual practices of Noble Silence, meditation, reflection and mindful awareness.
- by providing practitioners from all backgrounds and at all levels, from beginner to advanced, with inspirational teachings and practices from Buddhist and related traditions.
- by serving as a resource for groups, teachers, and practitioners in the Southeast.

Guiding Principles

- We value awakening and recognize that all beings have the capacity to transform their hearts and minds.
- We value stewardship and make decisions and actions that take the benefit of the Center, its stakeholders, and its living community into account.
- We value hospitality and seek to create an environment where everyone may feel welcome.
- We value compassion and believe that everyone should be free from suffering.
- We value accessibility and intend to serve all people, no matter their race, age, income level, gender identity, or spiritual tradition.

Strategic Directions

The following strategic directions will guide Southern Dharma's work:

- Invest in Human Capital** – Southern Dharma has the appropriate staff, board, and volunteer capacity to enable the organization to fully carry out its Vision and Mission
- Upgrade the Campus** – The facility and grounds facilitate the achievement of the strategic plan
- Sustain The Financial Health of the Organization** – Tighten financial reporting systems and develop more diverse development strategies to maintain long-term financial stability
- Maintain and Strengthen Excellent Programming & Outreach**– Southern Dharma is known as a leading Buddhist retreat center in the Southeast

STRATEGIC DIRECTIONS, GOALS, and OBJECTIVES

A. INVEST IN HUMAN CAPITAL – Southern Dharma has the appropriate staff, board, and volunteer capacity to enable the organization to fully carry out its Vision and Mission	Who Leads	By When	Status	Investment Needed over 2018 baseline
Key indicators of success <ul style="list-style-type: none"> • Staff turnover, staff satisfaction, staff paid a living wage • Board self-assessment indicates effectiveness 				
Goal 1: Support staff adequately and fairly				
Objective 1a: Focus on processes to bring more ease to the day-to-day operations (4)	DIR	2019		
Objective 1b: Create systemic evaluation process of future and current human resource needs and adjust staffing accordingly (4)	DIR	2019		\$12,000-\$34,000
Objective 1c: Offer staff fair market compensation and offer personal and professional growth opportunities (2)	Personnel Committee	2020		
Objective 1d: Experiment with rotating staff on/off during retreat (1)	DIR	2020		
Objective 1e: Update job descriptions, conduct on-going evaluations, prepare succession plans and “standard operating procedures” for each staff position (1)	DIR	2020		
Goal 2: Develop strong board and other leadership to ensure organizational sustainability				
Objective 2a: Align board member skills and experiences and diversity with the strategic plan	BC	Ongoing		
Objective 2b: Define board members’ roles and functions and train in best practices, including dynamic governance (4)	BC	2019		
Objective 2c: Refine board committees to utilize board expertise and commitment	BC	2020		
Objective 2d: Explore the addition of a Teachers Advisory Council to advise the board on ethical, diversity, programing, social engagement matters	DIR	2021		

Goal 3: Further develop volunteer programs to increase capacity and engagement				
Objective 3a: Formalize the resident volunteer program (1)	DIR	ongoing		
Objective 3b: Explore opportunities to further engage the Southern Dharma practice community	DIR	2020		
Objective 3c: Increase volunteer opportunities for off-mountain support	DIR	2020		
Goal 4: Review Strategic Plan progress				
Objective 4a: Maintain a dashboard of key indicators and present results quarterly to the board	DIR	ongoing		

B. UPGRADE THE CAMPUS – The facility and grounds facilitate the achievement of the strategic plan	Who Leads	By When	Status	Investment Needed over 2018 baseline
Key indicators of success <ul style="list-style-type: none"> • Long-term facility plan • Upgraded and expanded site and facility 				
Goal 1: Address immediate space and facility needs				
Objective 1a: Provide adequate staff office space (5)	BC	2019		\$350,000
Objective 1b: Provide a Director’s Cottage (3)	BC	2019		\$100,000
Objective 1c: Purchase tractor for road maintenance (3)	FAC	2019		\$50,000
Objective 1d: Purchase van (1)	FAC	2020		\$30,000
Objective 1e: Drill a second well	FAC	2020		\$5,000
Goal 2: Develop a long-term comprehensive facility plan, with future needs for the next decade projected				
Objective 2a: Establish goals of the campus facility plan, including sustainability and climate resiliency	DIR/FAC	2019		
Objective 2a: Contract with an architect and/or facility planner who can maintain the character of Southern Dharma (3)	DIR/FAC	7/2019		\$15,000
Objective 2b: Seek feedback from staff, board, and retreatants on desired upgrades in space or additional space needed and rationale; name any cost or other parameters. Possibilities include: <ul style="list-style-type: none"> • Housing to accommodate staff, volunteers, retreatants, and teachers, including consideration of options beyond the current campus • Retreatant space that is warm and comfortable – e.g., single rooms, lounge, handicapped-accessibility, place for movement and additional bathroom/bathhouse • New or expanded kitchen • Laundry facility • Adequate staff office spaces • Covered yoga deck/exercise area 	DIR/FAC	2020		

<ul style="list-style-type: none"> • Library and reading room – for retreatants and staff to lounge/study/gathering • Improve maintenance access to all buildings • Adequate storage for equipment, furnishings, and perishables • Movement/Forest Bathing/Hiking/Walking Meditation – Utilize more of the property by planning and creating additional walking paths with sitting areas for reflection • Teacher space for personal and group interviews • Forest refuge for solo and small, long-term retreats 				
Objective 2c: Implement facility plan recommendations	FAC	Contingent on capital campaign funds raised		

C. SUSTAIN THE FINANCIAL HEALTH OF THE ORGANIZATION – Tighten financial reporting systems and develop more diverse development strategies to maintain long-term financial stability	Who Leads	By When	Status	Investment Needed over 2018 baseline
Key indicators of success <ul style="list-style-type: none"> • Fundraising revenue makes up 20% of total budget • Successful capital campaign to upgrade and expand the campus 				
Goal 1: Strengthen Financial Reporting Systems				
Objective 1a: Create more regular, useful and timely financial reports for decision making (5)	DIR	4/2019		
Objective 1b: Revise, update, and document financial policies and procedures as needed	DIR/Treasurer	2020		\$XXX
Goal 2: Create a development plan	DEV	2019		
Objective 2a: Implement a more formal planned giving program	DEV			
Objective 2b: Increase registration income	DIR			
Objective 2c: Implement an annual fundraiser that reaches out to a new audience (1)	DEV			
Objective 2d: Explore a social enterprise or other earned income retail options (1)	DIR/DEV			
Objective 2e: Explore a capital campaign to fund any major transformations of the current campus	DIR/DEV	Contingent on Capital Purchases and Facilities Plan		

D. MAINTAIN AND STRENGTHEN EXCELLENT PROGRAMMING AND OUTREACH– Southern Dharma is known a leading Buddhist retreat center in the Southeast	Who Leads	By When	Status	Investment Needed over 2018 baseline
Key indicators of success <ul style="list-style-type: none"> • # retreat nights/year • Sustain 30 retreatants/retreat • Retreatants give a superior rating/review as it relates to a quality retreat experience 				
Goal 1: Improve quality and quantity of programming				
Objective 1a: Diversify teachers, participants, and traditions (3)	DIR	2019		
Objective 1b: Increase retreatant nights within current capacity	DIR	2020		
Goal 2: Reach new audiences				
Objective 2a: Engage in off-mountain programming within current capacity (e.g. offsite, online) to offer options on waitlist or not able to travel (1)	DIR	2020		
Objective 2b: Expand and clarify the scholarship or sliding fee scale to ensure accessibility to all	Program & Finance Committee	2020		
Objective 2c: Engage with the local community (onsite or in partner locations) to reduce SDRC’s sense of isolation and the locals’ perception of our desire to remain an “island”	DIR	2020		
Objective 2d: Increase the types of retreats as facility allows (e.g., solo, self-guided)	DIR	2022		

Goal 3: Strengthen communication				
Objective 3a: Enhance website and social media presence and use of multimedia tools to share the teachings with people off the mountain	DIR	2020		
Objective 3b: Track retreatant contact and demographic information for future outreach and program analysis via donor software (e.g., first time, location, age, gender, race)	DIR	2020		

BC – Board Chair
DEV – Development
DIR – Director
FAC – Facilities