

**Timeline in the Formation and Evolution
of the Triangle Insight Meditation Community
2009 - 2018**

'05 - '08: Community Dharma Leader Program 3 through Spirit Rock (CDL3 that included Cynthia Hughey, Jeanne van Gemert and Ron Vereen)

CDL is a program for senior Vipassana (Insight) Meditation students that includes the comprehensive training and competencies needed to: 1) lead sitting groups; 2) teach beginning classes and daylong retreats; 3) develop community-based sanghas and dharma organizations; 4) expand access to the teachings beyond previously served populations; 5) embody the skills needed for attunement, empathy and sensitivity to the role of teacher, the communities being taught and within the context of team teaching; 6) facilitate rites of passage and develop competency with Buddhist ritual; and 7) explore community outreach to people and communities heretofore underrepresented

Meanwhile, Phyllis Hicks had been studying intensively with Gregory Kramer around the practice of Insight Dialogue (ID), and was teaching ID at One Heart where Ron was also teaching meditation classes

05/09: Phyllis, Cynthia, Jeanne, and Ron met to discuss formation of the Triangle Insight Meditation Community (TI), to include Dave Hughey as guest teacher for slots as needed

7/09: First meeting of TI @ One Heart (a home in a Durham neighborhood)

12/10: Outgrew One Heart and moved to Episcopal Center

05/13: TI becomes 501(c)(3) with the IRS

07/13: First meeting of the Shramadana Project of TI (volunteer initiative) with Mary Mudd as coordinator

05/14: First retreat for TI at Stone House, led by Jeanne and Ron, Mary Mudd coordinating, followed up in May '15 & '16 with Leah Rutchick as registrar and Karen Ziegler as coordinator and Leah Rutchick as registrar, while Phyllis was also leading ID retreats through Metta Programs

08/14: Prior to the planned Community Forum in 9/14, several voices gave concerns to the feeling that the sangha was not meeting the needs for a more intimate relational connection with others, particularly noting that the structure of the Wed. evening meetings were not conducive to this and a feeling that TI was operating with a hierarchy in its structure. This was

acknowledged at that time pointing out that TI was a teacher-led group at this point in its evolution

09/14: Community Forum on “What Does it Mean to be a Sangha?” from which the Kalyana Mitta (KM) groups formed, with Sarah Tillis as coordinator and Tom Howlett and Tamara Share serving on the KM committee, and Jeanne as liaison to the board.

Follow-up in the newsletter: “We feel honored and blessed to have such a vibrant community and are excited about our ongoing transformation. We'll close with a comment from one of the groups that may help guide us toward the important quality of humility as we proceed in this endeavor together: ‘living the reality that nothing is perfect.’ May we all be curious, open, accepting, and humble so as to free us from limiting, egoic desires.”

Around this time Leah Rutchick volunteered to help with TI newsletter

05/15: Cynthia steps down from monthly teaching responsibilities and TI begins to invite more quest teachers, e.g., Jeff Brantley, Mary Matthews Brantley, Therese Fitzgerald, Leigh Brasington

07/15 TI began responding to the Charleston Massacre, receiving notification from Buddhists for Racial Justice with the Call to White Buddhists and the resource of White Awake being recommended. Attention was drawn to the US Buddhist Leaders Conference in DC May 2015 where they identified racial injustice and climate change as the two most important issues of our time, recommending that Buddhist communities begin taking up these concerns in whatever ways they can

08/15 Ten people from TI attended the Mindful of Race retreat with Ruth King; following this the Racial Affinity groups began forming along with the encouragement for those in the sangha to participate in trainings offered by Dismantling Racism (dRworks) and OARNC/REI (Sarah Tillis began keeping of list of those who participated in various trainings around racial equity/justice). Cathy Cole began working regularly with OARNC and has served as an interface between them and TI

01/16: Scott Bryce came to TI as Guest Teacher (and again in 8/16)

04/16: Formation of Media Night committee with Gerri McGuire as coordinator with Tom Howlett, Leah Rutchick and Karen Ziegler also serving, with the Black Power Mix Tape being the first screened, and several events since

06/16: Formation of Caring Circles as a component of the SP with Gordy Livermore as coordinator

- 09/16: Scott joins as teacher and board member - at this point at least one voice in the sangha questioned how such decisions are made
- 10/16: Collaboration with Chapel Hill Zen Center, Shambhala Center, Karma Thegsum Choling, Durham Congregations in Action, and Triangle Insight to bring Rev. angel Kyodo williams to Durham; this was followed up in 10/17 with bringing Lama Rod Owens for a variety of week-long teaching activities
- 11/16: At a Shramadana Project meeting members discussed TI's racial equity work and what direction to take next, given the work of the RA groups, Rev. angel's visit, and the contemplation of the white savior complex questions. The potential role of facilitators came up. Barbara Shumannfang offered to contact dRworks to find out more about how they facilitate work with organizations, since their workshop approach was compatible with several aspects of the dharma. There was interest in that, and Ron said it would be helpful if Barbara contacted them to find out more. This is reflected in the [Nov 16, 2016 SP meeting minutes](#). (7&9)
- 02/17: TI Board Meeting with Karen Ziegler, Barbara Shumannfang, Leah Rutchick, Mike Hall, Mary Mudd, Sarah Tillis invited to explore improved communication among members of TI via newsletter, website and potential survey, to continue the planning for specific work for the sangha around issues of racial justice, as well as examining the current governance structure of TI and proposed changes. Leah and Mike to continue exploring newsletter/social media/website, and Barbara to check back with dRworks to tailor a training just for TI.
- 04/17: TI Board Meeting with Karen Ziegler, Barbara Shumannfang, Leah Rutchick, Mike Hall, Mary Mudd, Sarah Tillis to follow up on the items from the previous meeting, learning that dRworks had wrapped up and was no longer available. One suggestion was to explore Larry Yang and/or Ruth King as possibilities. It was also suggested that contacting an outside consultant might be useful when considering alternative forms of organization and decision making responsibility (so that unproductive, unwise forms not be adopted)
- 06/17: TI Board meeting (teachers only) to review progress on above, with the main focus on asking Barbara Shumannfang to explore options, recommending she contact Kitsy at EBMC for her input. The recommendation from Kitsy was that the sangha needed to do some more work around the current structures that may be in place that support the dominant norms, and that we may benefit from the guidance of skilled, neutral facilitators. Barbara and Ron met with facilitator Kathleen Crabbs Clark from Open Source Leadership Strategies. Kathleen suggested the formation of an Equity Leadership Team of 4-7 individuals to assist the

facilitators in assessing both the current culture and readiness of the team to engage in racial equity work, and to communicate with them about our needs as a sangha so that they can tailor their assessment and workshop creation to our needs. This group was to be representative of the differences in race, gender, sexual orientation, position in the community, length of time with the community and other differences present.

- 06/17: Jean Hamilton organizes Mindful Meditation at the North Carolina General Assembly, followed up in 09/17 with Meditation at Silent Sam in Chapel Hill
- 07/17: SP initiative for painting the trim of the Great Room of the EC, organized by Howard Staab. Howard also agreed to construct storage units for the mats and cushions to be placed in the Great Hall for easier accessibility
- 10/17 Equity Leadership Team was finalized and approved by the TI board that included Scott Bryce, Mary Grigsby, Jean Hamilton, Phyllis Hicks, Francesca Morfesis, Susan Orovitz, Barbara Shumannfang, and Ron Vereen. This first meeting of the ELT on 10/17/17 included Kathleen Crabbs Clark and Sterling Freeman with OSLS, at which time it became clear that there had been a lack of transparency with the sangha about the process that was used to get us to this point, with some question raised as to our readiness to engage in a sangha-wide workshop that had been tentatively scheduled for Dec. 1st
- 11/17: The next ELT meeting scheduled for 11/9/17 was cancelled due to an unanticipated conflict for one of the facilitators. Since the recommendation had come from the facilitators that the sangha-wide meeting planned for 12/1 be postponed, the ELT decided to meet on that date without Kathleen and Sterling. The ELT and board agreed that it would be advisable to send an email update to the sangha about TI's process thus far, and this went out on 11/21 which included an announcement about the postponement of the 12/1 sangha-wide meeting. In addition, to provide more transparency about the ELT as well as the evolution of Triangle Insight in general, several links to documents were provided in the email, including a timeline of the evolution of Triangle Insight and one of the formation and roles of the ELT. The email also invited anyone who wanted to provide feedback or input about the process to do so, which was then shared with the board and the ELT prior to the scheduled ELT meeting on 12/1.
- 12/17: The ELT met on 12/1 to continue to explore the issue of the sangha's readiness to pursue racial equity work, and to review the input that was received from several sangha members in response to the 11/21 email update. Four responses had been received as of 12/1, noting that there was general confusion as to whether we are undertaking racial equity

work or evaluating the governance structure currently in place that reflects the norms of the dominant culture and holds the power in the form of decision-making for the sangha. More input from the sangha was felt to be needed to begin to shift this dynamic. Barbara Shumannfang contacted Kathleen to share the discussion at the 12/1 meeting, including the feedback from the sangha. Kathleen stated we needed to explore our readiness, willingness, and timing for racial equity work, and “there are no answers, only questions,” with some important questions needing to be explored: What are our norms, beliefs, and values? How do structural racism, sexism, heterosexism operate in the sangha? How do we want to interrupt them? Do we want to be clear about our rules and practices, how resources are used and where power resides? Since some questions came up in the ELT as to whether we should continue the process, Kathleen stated that if we ascertain we are ready and willing (i.e. if we can be clear about what it is we are asking, and that we want to look at power through a racial equity lens) then she would be glad to attend an ELT meeting so there’s a chance to find out more from us and describe how she and Sterling would work with us, including bringing Buddhist principles/framework to the discussion.

01/18: The second ELT meeting without facilitation was held on 1/12, exploring the process and the communications thus far, along with input that members of the community had given, with no decisions made as yet regarding next steps. What came out of the ELT meeting was that the lack of transparency we failed to establish had been harmful to some in the community, with feelings expressed of being excluded in the process. In keeping with one of the tenets of Buddhist practice of non-harming, it was felt there was a need to address that shortcoming before proceeding. After further deliberations with Kathleen and Sterling there was a consensus that the harm needed to be acknowledged, and given the many dynamics at play, it was advisable to postpone plans for racial equity work until the norms and culture of the sangha could be explored, after which any necessary changes in the governance structure that are needed to best meet the needs of the community would be examined. An announcement was made at the 1/31 regular meeting of the sangha informing them of the above, along with an invitation to attend an open board meeting on 2/4 in order to explore further as a community; this was followed by another announcement in the monthly newsletter that was sent out on 2/1. In addition, Kathleen and Sterling remain available in the future for the racial equity work, but did not feel they were the ones to guide us through the process of evaluating the norms and culture at this time. Recommendations of potential facilitators were offered for this next step.

02/18: Open TI board meeting was held on 2/4 ([minutes here](#)), giving those present additional opportunity to offer their perspective on the process

thus far regarding the Racial Equity initiative and selection of the ELT. In addition, since the board had made the decision to postpone the original plans to explore racial equity training, the interest was now in the direction suggested by two independent consultants to have a skilled, neutral facilitator to help our community examine our shared values, norms, and culture so as to discover what structural changes in governance may need to be made. Four potential candidates were identified, and four individuals present at the open board meeting volunteered to do an initial interview with the candidates using a set of questions developed at the meeting. The process was to have the four interviewers compare notes, and if questions arose about which facilitator to choose, then another board meeting would be scheduled to include any others who wanted to attend. Of note was a concern expressed at a SP on 2/21 meeting that some in the sangha were unable to attend the 2/4 open board meeting due to the short notice given for that meeting. The possibility of arranging another open board meeting was recommended. This matter was later brought before the board with the consensus that an additional open board meeting would be helpful in the overall process.

03/18 Another open board meeting was held on 3/18/18 ([minutes here](#)) in which the process thus far was reviewed along with further discussion. There was a consensus of those present at the meeting with respect to the following: 1) that a skilled, neutral facilitator would be helpful to the sangha in this process of discernment as a community; 2) that the board should continue with the process that had been initiated at the February 4th meeting for selecting a facilitator; and 3) that the next board meeting would be a closed meeting in which a facilitator would hopefully be selected from the potential candidates; and 4) that the sangha would then continue to plan for the facilitated community meeting discussed above. At the closed board meeting 3/31/18, the process thus far was reviewed, along with the interviewers' notes on prospective facilitators, and a decision was made to contact Katherine Turner, pending follow-up to explore availability and next steps needed to come to a final decision. Katherine was contacted 3/31/18 and agreed to meet with the board to discuss further plans and develop a scope of work for the sangha.

04/18 The board met with Katherine on 4/11/18 to see if we would be a good fit, following which the decision was made to proceed. She then developed of a scope of work (SOW) for the exploration of TI's values, norms, and structures that was approved by the board. This [SOW](#) would initially include Katherine's participation at one of the regular Wed. night gatherings of TI, followed by a day-long retreat with the sangha that would provide more in-depth exploration and discernment. In addition, a working group would be formed that would include Katherine, the board, and three others from the sangha. Katherine and Ron spoke about the announcement for the May newsletter, at which time an overview of the

overall process would be given, along with an invitation to the sangha for three interested members to participate in the WG along with the board and Katherine.

05/18 The May 2018 newsletter with the above referenced announcement was emailed out to the contact list, and three members from the sangha were selected to join the WG: Francesca Morfesis, Gordy Livermore, and Mary Mudd. Katherine was notified and the WG will await instructions from her on the next steps in the process.