Shalom Mountain: History and Accountability for Change

The About Me Story

Shalom Retreats® were developed by Jerry and Elisabeth Jud, in 1969, as a process for exploring the transformative power of loving community. Jerry and Elisabeth demonstrated that by creating a community that practices the skills of intentional loving, great personal healing and transformation can occur. In 1976, Shalom Mountain Retreat and Study Center was established in the Catskill Mountains one hundred miles northwest of New York City as the home of Shalom Process. It was founded as a 'hope structure', calling people to live passionately and with compassion in the world.

From 1992 to 2007 the subsequent owners, Joy Davey and Lawrence Stibbards significantly expanded the center's retreat offerings and developed leadership training programs. Joy and Lawrence retired in 2007 and long-time Shalom community members Victoria Myer, Shawn Ramer, and Terry Shirreffs purchased the retreat center. In 2011, they transitioned Shalom to its current structure as a not-for-profit 501c(3) organization and Nance McGee was appointed to the role of Executive Director. She brought with her extensive experience in retreat leadership, counseling, training, management, and boards.

Shalom Mountain® is run by a management team, staff, volunteers and a network of retreat leaders with backgrounds in psychology, theology, education, medicine and business. Our retreat leaders are extensively trained and experienced in Shalom Process.

The Call

The Shalom Mountain ProJustice Team (SMPJT) was formed to support Shalom Mountain's DEI efforts on an individual, community and organizational level. Formed in June 2020, as response to the murder of George Floyd, the SMPJT currently has ten members and is composed of retreat leadership, board members and community members; their efforts are supported by the Executive Director and Board of DIrectors.

In September 2022, the SMPJT published a request for proposals in search of an experienced consultant to *help audit and recommend best policies, practices, programs, and organizational behaviors that foster authentic diversity, equity, and inclusion within SMI and its programs, positioning the organization internally and externally for greater engagement and impact with diverse communities.* The solicitation included intent to hire the consultant to guide the creation of a multidimensional diversity, equity, and inclusion plan for SMI. However, funding was not made available to support the full scope of work. Seeds of Change Consulting was contracted to perform an equity audit for SMI in February 2023, tabling the strategic plan development as a Phase II project.

In the document, Shalom Mountain, Inc. (SMI) stated that, *Amongst our community, there has been a growing recognition that most of our community and SMI as an institution has been asleep to the impacts of structural and institutional racism on the development and delivery of our programs, the ability for Black, Indigenous and People of Color (BIPOC) to safely access those programs and for white Shalomers to explore and reflect upon their own unconscious complicities and white privilege.*

The project team was comprised of individuals from throughout the Mountain who represent a diversity of:
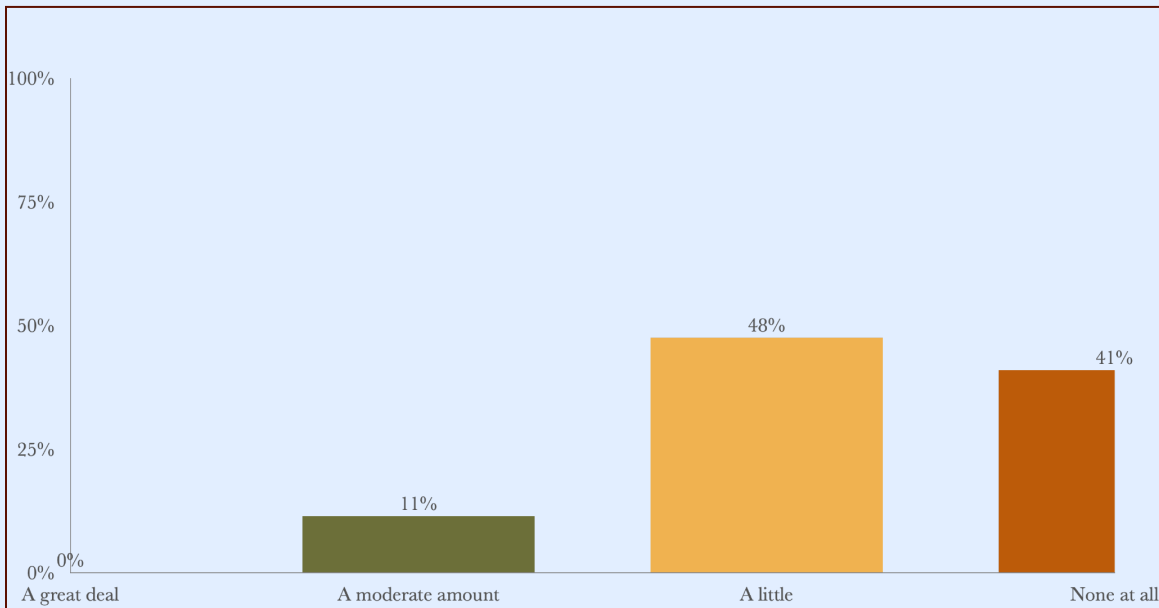
- ❖ Race, ethnicity, gender identity, sexual orientation,ability status, age, and other important characteristics;
- ❖ Tenure in the organization;
- ❖ Role (e.g., board, leadership);
- ❖ Emerging and experienced leadership, including those who have a role that does not typically afford them an opportunity to have a voice in organizational change.

Land and People

The land on which Shalom Mountain is currently situated was originally known as Lenapehoking, or *land of the Lenape*. There is a general absence of acknowledgement from Shalomers about how the land was stolen by European settlers and colonized by white cultures. Aggregated data collected by Seeds of Change Consulting revealed that more than 90% of Shalomers who engaged in this process had little to no knowledge about the first people or the land that participants occupy while at the Mountain. Additionally, collected data revealed that between 10-20% of participating Shalomers did not share the belief that deepening relationships with Indigenous people proximate to Shalom Mountain held value.

➢ What do you know about the Indigenous People and
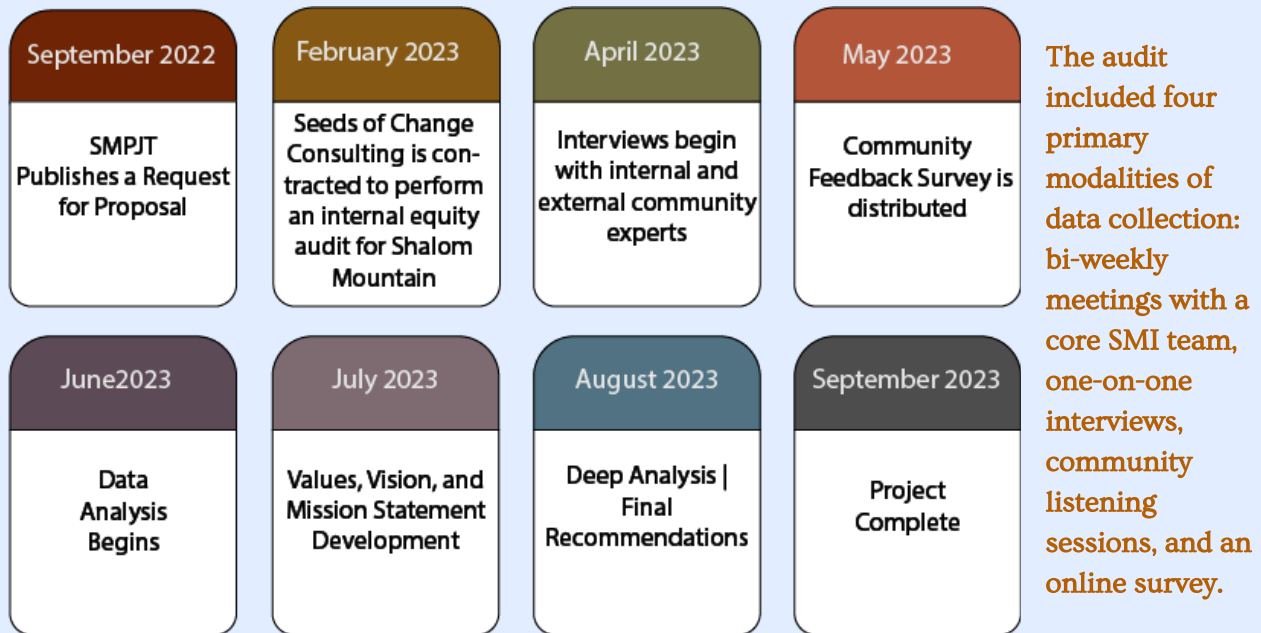their land Shalom Mountain is currently occupying?

Bar chart showing responses:
- A great deal: 0%
- A moderate amount: 11%
- A little: 48%
- None at all: 41%

➢ Shalom Mountain should build deep relationships
with Indigenous People in the local community.

Bar chart showing responses:
- Agree: 85%
- Disagree: 15%
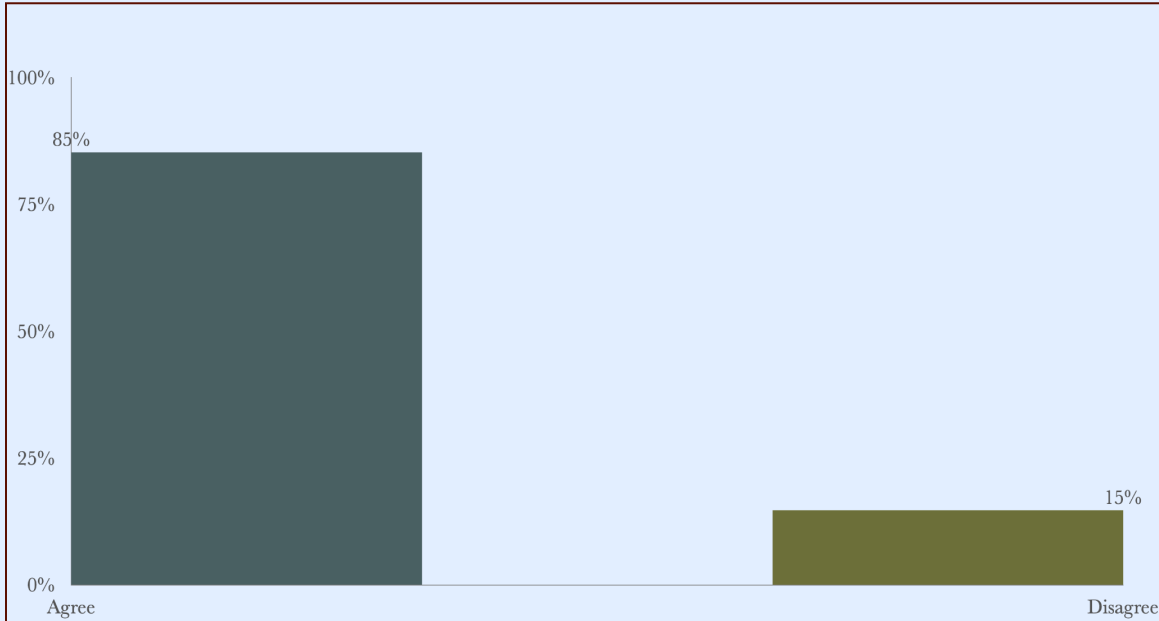
The biggest piece is that Shalom has not had a relationship with the community, general speaking. Someone bought the space and created a retreat center and brought in their own people. Not many folks from the community engage with the Mountain at all.

The Process

September 2022	February 2023	April 2023	May 2023
SMPJT Publishes a Request for Proposal	Seeds of Change Consulting is contracted to perform an internal equity audit for Shalom Mountain	Interviews begin with internal and external community experts	Community Feedback Survey is distributed

June 2023	July 2023	August 2023	September 2023
Data Analysis Begins	Values, Vision, and Mission Statement Development	Deep Analysis | Final Recommendations	Project Complete

The audit included four primary modalities of data collection: bi-weekly meetings with a core SMI team, one-on-one interviews, community listening sessions, and an online survey.

Seeds of Change and the Shalom Mountain team met 17 times, biweekly, over a period of six months. Anti-racism resources were provided to the team; space was built into each meeting for each team member to ask questions and reflect on the readings or videos. Additionally, six one-on-one conversations took place between the SoC team and members of the SMI community. Two community listening sessions were held in June 2023, offering space for deeper conversations about the future of Shalom Mountain's work towards becoming an anti-racist organization. An invitation to participate in an online survey was extended to over 1000 community members on the SMI newsletter listserv; The survey tool was designed to capture demographics, relationship to Shalom Mountain, culture & capacity, and direct feedback; 70 people responded to the survey.

The SMPJT emphasized the importance of the SoC team experiencing the space of the retreat center to gain insight into the spirit of the Shalom Process. An invitation was extended for our team to attend the WOW retreat in May 2023 by the PJT. However, funding for travel and accommodations was denied. Seeds of Change pivoted our approach; we worked with the retreat leaders to create a virtual presentation and Q&A during the plenary session on Saturday morning.

Discoveries

Survey participants opted in to self identify demographic markers. More than 75% of survey participants described themselves as white; 6% as Asian / Pacific Islander; 6% as Hispanic; 4% as Multiracial; 8% self-identified. *One survey participant identified as Black or African American and no participants identified as Native American.* Several participants voiced an interest to engage in a deeper conversation with the Seeds of Change team; two community listening sessions were provided to glean additional insight and experiences.
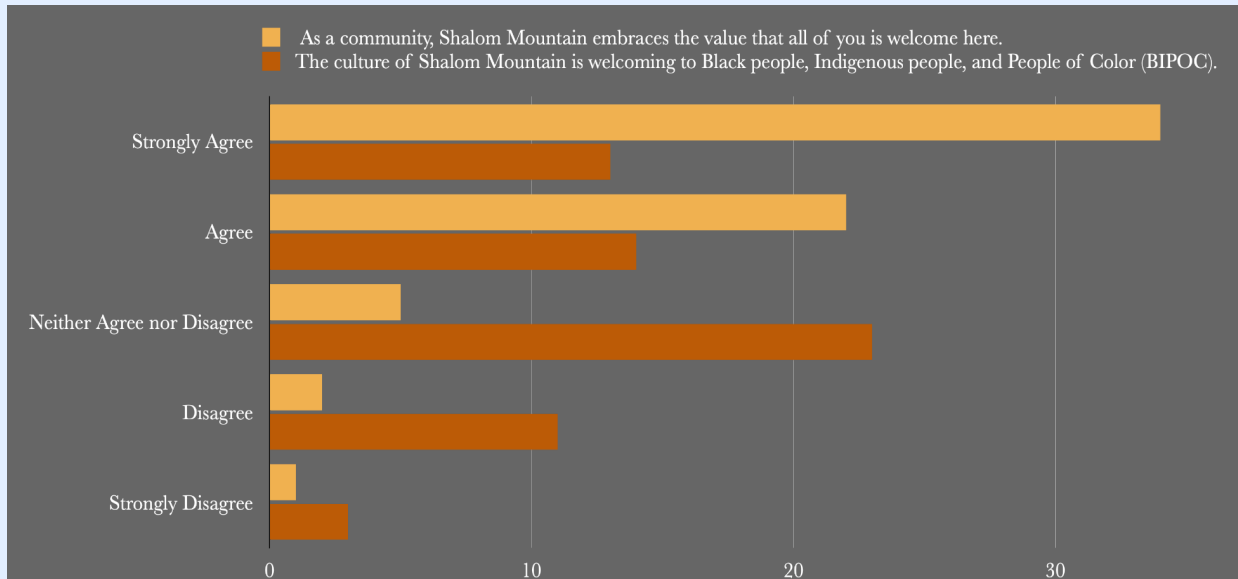
PARTICIPANT PROFILE

Gender
woman

Race | Ethnicity
white

Age
50-69

Years with Shalom Mountain
10 or more
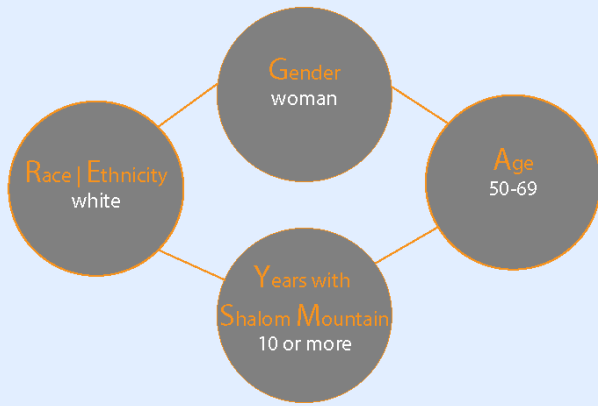
With Shalom Mountain's creed of belonging, *all of you is welcome here,* placed as the guiding light for leading us through this process, we found contradictions of this value within the daily systems and community practices of the Mountain, such as the repeated use of the phrase, *not for everyone*, during conversations and survey responses when reflecting on programming at the Mountain. We used these discoveries to shape our approach of gathering data to support recommendations that will undergird Shalom Mountain's journey towards becoming an anti-racist organization.
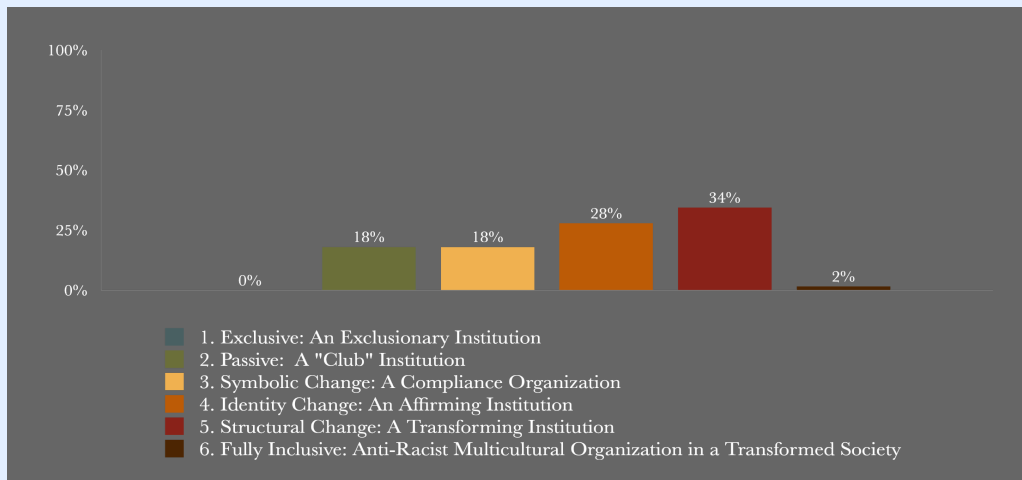
Data offered evidence that a certain amount of cognitive dissonance is present in the community's understanding of *all of you is welcome here*. The chart below demonstrates that while participants, by a wide margin, agree that the Mountain is true to this belief, respondents were less certain about whether the community is welcoming to Black people, Indigenous people, and People of Color. *The culture of the Mountain is steeped in whiteness and it will take a great deal of intrapersonal and intergroup work to create a new way of being.*

▮ As a community, Shalom Mountain embraces the value that all of you is welcome here.
▮ The culture of Shalom Mountain is welcoming to Black people, Indigenous people, and People of Color (BIPOC).

	0	10	20	30
Strongly Agree				
Agree				
Neither Agree nor Disagree				
Disagree				
Strongly Disagree				

The community intends to be welcoming, but is unaware in so many ways how it is not. Most community members (white, het, cisgender) do not know what they do not know. Too many think that being loving and kind is being welcoming.

An area of strength for the Mountain is the community commitment to the Shalom Process. Instances of identity diffusion emerged within participant narratives when there was uncertainty about how to hold the Process as sacred while questioning the Process as an equitable experience. However, we found that because the Shalom Process does hold deep value to the community, folks were willing to engage in diffuse thinking to dream and create future pathways. We asked, **In what ways could Shalom Mountain create a more welcoming, anti-racist experience?** Examples of feedback received:

❖ Retreat leaders addressing microaggressions as they happen on retreat.
❖ Walk the talk. Address racism at the Mountain. When a participant makes a racist comment, the leaders need to address it immediately. The leaders need to indicate that this is unacceptable and to address the feelings of those present who were hurt by those comments. The leaders should explain why the racist remark was inappropriate and hurtful. The person making those racist remarks must attend racial sensitivity training before returning to the Mountain so that they will not reoffend.
❖ A great deal more self-education by the administration, required training for leadership, actively seeking out more BIPOC leaders and board members (and offering dedicated scholarships for their training), keeping abreast of best practices in cultural competency.
❖ Diversify its leadership, and remove leaders who are unable to keep up with a changing social fabric.
❖ Include black artists' work in the house; play a variety of dance music highlighting other cultures; include BIPOC folk as part of and don't exclude by retreat.
❖ When I have shared the unwelcoming things that have occurred, they were not responded to with any response from Shalom leadership.

1. Exclusive: An Exclusionary Institution
2. Passive: A "Club" Institution
3. Symbolic Change: A Compliance Organization
4. Identity Change: An Affirming Institution
5. Structural Change: A Transforming Institution
6. Fully Inclusive: Anti-Racist Multicultural Organization in a Transformed Society

On the community survey, we provided respondents with an organizational continuum and asked them to place Shalom Mountain within a category that best aligned with their experiences. Each category on the document gave examples for respondents to reference. More than 60% placed the Mountain as either (4) Identity Change: An Affirming Institution or (5) Structural Change: A Transforming Institution. These results misalign with narratives detailing experiences at the Mountain related to white supremacy culture and equity.
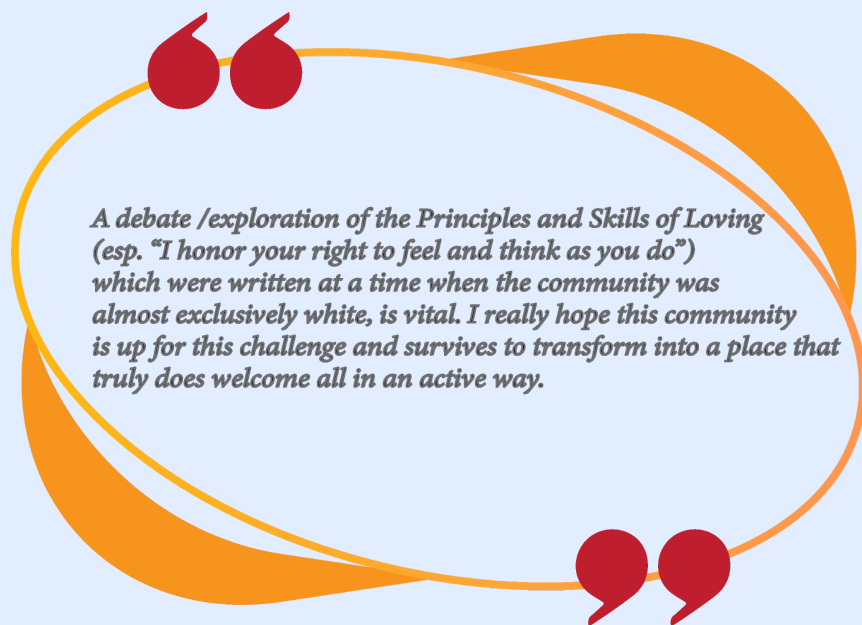
A debate /exploration of the Principles and Skills of Loving (esp. "I honor your right to feel and think as you do") which were written at a time when the community was almost exclusively white, is vital. I really hope this community is up for this challenge and survives to transform into a place that truly does welcome all in an active way.

A second phase of the process included co-creating values and vision statements for Shalom Mountain. A core group of community experts (those who have invested personal time and work at the Mountain) opted in to contribute to this process alongside members of the Shalom Mountain leadership team and board; we met three times in addition to online collaborations. The purpose of this work was to establish foundational elements for future strategic planning endeavors. Investment and interest for engaging this process was high and produced positive outcomes for identifying community priorities. Group members participated in deep conversations to identify six core values of the Mountain: community, love, transformation, compassion, integrity, equity & inclusion. The following are the values statements the group co-authored:

Community: We are committed to refining our practice of co-creating and embodying a welcoming community, guided and informed by the principles and skills of loving, that calls forth vulnerability in shared brave space, and the practice of supporting each other and realizing our fullest potential. Our transformational work would not be possible without the loving container the community provides, and this transformational process, in community, is the hallmark of Shalom Mountain.

Love: We are a community of loving intention committed to being awake and aware of our impact on each other and the world. We strive to embody and evolve the Skills of Loving in the spirit of goodwill, personal and organizational responsibility and forgiveness.

Transformation: We are committed to practices and processes that can act as a gateway to transformation both within ourselves and the communities we inhabit.

Compassion: Compassion is the open-hearted curiosity and intention to see, hear and respond to each other and ourselves across the full spectrum of our unique life experiences.

Integrity: We commit ourselves to interpersonal and organizational integrity by upholding the highest **ethical standards** in order to hold ourselves accountable when our actions fall short of our stated values.

Equity & Inclusion: We commit to breaking away from historic, normative values that pervade our community in exclusive and harmful ways. We strive to actively notice and remove barriers of systemic societal patterns, so that all have access and full participation in the community.

Group members used the co-authored values statements to undergird the creation of a working vision statement for the Mountain. The Seeds of Change consultant team encouraged the group to view the outcomes of the values & visioning process as a strong foundation for entering into future planning for the organization and not as an endpoint.
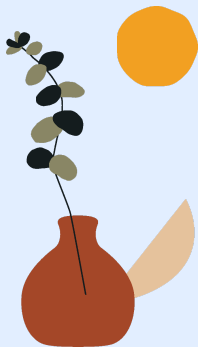
Vision Statement

We strive to create transformational spaces where all people who are ready to explore a journey of consciousness can find community, love, and emotional healing.

Why This Matters

When studying the internal systems and processes of Shalom Mountain, we discovered:

❖ 100% of paid and volunteer staff self-identify as white.
❖ One of 18 retreat leaders self-identifies as a person of color.
❖ One of eight board members self-identifies as a person of color.
❖ There are no clear decision-making processes for programming or fund distribution.
❖ There is an absence of grievance processes for staff, retreat leaders, and retreat participants.
❖ The Executive Director has minimal accountability to the board of directors.
❖ Retreat leaders are highly invested in the Shalom Process.
❖ There is no established process, monitoring, or format for content on social media platforms.
❖ *All of you is welcome here* vs. *[Shalom Mountain] is not for everyone*

In order to truly become a place where everyone feels they belong and has equitable access to the programs, services and opportunities that are at the heart of what Shalom Mountain is about, SMI must intentionally shift to a proactive, equity-centered approach to how they are structured, how services are delivered, how they engage with the broader community, and how they support the leadership team.

Although the Racial Justice Recommendations center race explicitly, we are not focusing on it exclusively. We understand that many people hold multiple marginalized identities, and we strive for an intersectional approach in our equity work.

We also know that structural racism and white supremacy will not be easily or quickly dismantled, and we recommend a commitment to continual progress toward an organization that models the society in which you want to live, work, and receive care. This transformative process will be ongoing.

Many individuals from both within and outside Shalom Mountain named and identified a number of race, gender and class-based challenges that BIPOC participants and leaders experienced in their interactions at Shalom Mountain, and they made efforts over the years to name the damage and harm that they had experienced; and to urge the organization towards making change, that included a racial equity frame. The ProJustice Team has played an instrumental role in both lifting up and centering race equity as a priority at Shalom Mountain and has been urging the organization to make a commitment to action.

Feedback gathered through both survey responses and the community listening sessions revealed that, by majority, the Shalom Mountain community *wants* the environment and retreat experience to be a safe and welcoming space for people across identities. However, there is uncertainty about how to achieve that goal.

Making it a more inclusive place for BIPOC is really important to me.

Are we a safe place for POC?

There is a history of social justice actions going back to the very beginning I would love to see recovered.

From personal experience, I do not expect Shalom to be an organization that engages in structural change around race, and for many reasons, it may not be suited to do so.

I think we have a positive attitude to inclusion but I am not sure we do a lot to make it easier for folks to step out of their element in order to attend a Shalom retreat.

I have witnessed acts of discrimination, intentional hate speech, microaggressions, and experienced multiple examples personally.

It also requires having enough POC in leadership to help set a tone.

Recommendations for Becoming an Anti-Racist and Equitable Organization

Three strategic pillars emerged to offer direction, guidance, stability and purpose for our recommendations. Strategic pillars provide focus and insight for meeting organizational goals.

Equity in Organizational Composition	Equity in Process	Equity in Engagement

3-6 Months

Immediate Action

- Racial Equity Training & Continuing Education for all staff, board, and retreat leaders
- Budget to reflect values
- Create and implement a grievance process (internal & external)
- Equity-focused three-year-strategic plan
- Racial justice affinity space

6-12 Months

Short Term Action

- Build a Diverse Board of Directors Committed to Antiracism
- Equip Executive Director and Staff to Lead Equitably
- Engage deeply within the surrounding communities
- Create & Implement Circle Process for Restorative Justice (conflict resolution)
- Establish a Diverse Team of Leaders that Advances Racial Equity

12-18 Months

Long Term Action

- Cultivate a Rich Learning Environment
- Succession Planning for organizational leadership
- Foster a Culture of Belonging
- Create & Implement Accountability Process for Executive Director and organizational leaders

Produced by:

SEEDS *of* **CHANGE**
CONSULTING

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