



732 Ninth Street, No. 521  
Durham, NC 27705 USA  
katherine@globalcitizenllc.com  
+1-919-452-5224  
[www.globalcitizenllc.com](http://www.globalcitizenllc.com)

June 3, 2022

## **Consultancy Proposal: DEI/Racial Equity-Centered Strategic Assessment, Visioning, Planning, and Board, Teacher, and Sangha Member Development**

Katherine Turner of Global Citizen, LLC (Consultant) will collaborate closely with the Insight Meditation Community of Charlottesville (IMCC) board members, teachers, advisory group, and other sangha members to co-design and facilitate a transition from a founder-led organization to their next iteration. This will include a rapid assessment, strategic visioning of a reimagined structure and governance that is grounded in diversity, equity, inclusion, and justice (DEIJ), with a focus on racial equity, strategic planning, and board member, teacher, and sangha member development. DEI/racial equity will be infused throughout the process and fully integrated into the resulting organizational structure and governance. This will be a highly collaborative process in which the board members, teachers, advisory group members, and sangha members will be fully engaged in the rapid assessment and strategic visioning and planning processes.

### **This consultancy will include the following deliverables:**

- Form a small but representative advisory group comprised of board members, teachers, and other sangha members who will conduct research and co-design and assist with facilitation of sangha member sessions.
- Co-design and facilitate a preparatory, virtual conversation with all sangha members to lay the groundwork for the rapid assessment and strategic visioning and planning processes.
- Conduct a rapid assessment, including:
  - The advisory group will conduct research on other sanghas' DEI/racial equity-centered organizational structure and governance.
  - The Consultant will review IMCC background documents, data, and other artifacts and the results of the advisory group's research.
  - The Consultant will conduct virtual stakeholder interviews with a sample of six board members, teachers, and other sangha members.
- Co-design and facilitate a virtual session with board members and teachers and then a virtual session with all sangha members on the rapid assessment findings and recommendations.

- Co-design and facilitate two virtual board member and teacher development sessions on DEI/racial equity-focused organizational structure and governance.
- Co-design and facilitate a half-day, in-person strategic visioning and planning process with board members. Facilitate up to two virtual follow-up sessions to complete the strategic planning process.
- Co-design and facilitate an in-person conversation with all sangha members on the new DEI/racial equity-focused organizational structure and governance.
- Facilitate a final briefing session with board and advisory group members and teachers to advise on next steps.

Additional consultations and sessions, if needed, to be determined and budgeted separately.

**Timing:** The exact dates and times will be determined with the board, teachers, advisory group, and other sangha members.

**IMCC board members, teachers, and advisory group members will provide:**

- Background documents, data, and other artifacts
- Research on other sanghas' DEI/racial equity-focused organizational structure and governance
- Timely feedback on communications and recommendations
- Venue, food, drinks, meeting supplies, and other items as needed for in-person sessions
- Other assistance as needed to complete the deliverables

**Compensation:** \$10,000 to be paid in three equal installments upon receipt of invoices at the time of agreement on the scope of work, midway, and at the conclusion of the engagement.

**Specialized experience:** The Consultant has collaborated with another insight meditation community to co-design and facilitate a similar DEI/racial equity-focused transition, and she maintains a personal yoga and meditation practice.

**Reference:** The following reference can speak to the Consultant's experience, skills, and excellence in intersectional DEI/racial equity assessments, strategic visioning and planning, organizational restructuring, communications, board and member development, coaching, and collaborative working relationships with a similar insight meditation community.

- Ron Vereen, Triangle Insight Meditation Community: [ron@triangleinsight.org](mailto:ron@triangleinsight.org) and [rlvereen@aol.com](mailto:rlvereen@aol.com).

## CONSULTANT BIO

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[Katherine L. Turner, MPH](#) is the Founder and President of [Global Citizen, LLC](#), a consulting firm that works in the United States and internationally to strengthen leaders' capacity to effect inclusive leadership, organizational transformation, and social impact by advancing diversity, equity, inclusion, public health, human rights, and global intercultural competence. She serves as [Adjunct Professor](#) at the UNC-Chapel Hill Gillings School of Global Public Health where she teaches graduate-level courses on leadership, systems and design thinking, cultural competence, and a range of global health topics and mentors the next generation of global leaders.

Katherine is an internationally-recognized executive consultant, thought leader, public speaker, educator, author, and change agent who has worked in English, French, and Dutch in more than 50 countries spanning five continents. She provides strategic direction on global advisory committees, has founded and led the board of directors of nonprofit organizations, and won numerous awards for excellence in leadership and advocacy.

Global Citizen, LLC is a woman and LGBTQ+-owned small business that works in partnership with a diverse network of dynamic consultants and interns and collaborates with company leaders across all sectors to conduct strategic visioning, assessments, landscape analyses, and planning; facilitate values clarification; align vision, mission, values, policies, practices, and culture; strengthen capacity in organizational, board, leadership, and business development, intercultural competence, equity, diversity, and inclusion; improve programs, services, and performance; and deliver high-impact results **for a better world**.

Please see [Global Citizen, LLC](#) for more information on our vision, mission, approaches, and client partner engagements. References are available upon request. Connect with Katherine and Global Citizen, LLC on [LinkedIn](#), [Twitter](#), [Facebook](#), [Instagram](#), and [YouTube](#).

*☀️ Global Citizen, LLC is committed to creating dynamic partnerships and engagements that promote integrity, equity, diversity, inclusion, innovation, user-centered focus and evidence-based practices. ☀️*