

OUTREACH TOOLKIT

Guide to Outreach

Welcome to the Outreach Toolkit! This toolkit is a set of resources for planning the next gateway program at your Shambhala Center or Shambhala Meditation Group. It can also be used to take Turning the Mind into an Ally "on the road" to venues outside a Shambhala Center. In addition to this *Guide to Outreach*, the Toolkit CD includes advertising templates, program formats, and follow-up procedures. These create an integrated package that addresses the "before, during and after" of a gateway program.

The idea is to think of a gateway program as a process rather than an event. Who is the target audience and how do we reach them? What is the next step after a gateway program and how do we steer new students in the right direction? The Outreach Toolkit is designed to help your center, or group, reach those who are interested in meditation and provide support for newcomers afterward their first introductory program.

Please use the Outreach Toolkit if, how, and when it is useful, particularly the next time you offer Turning the Mind into an Ally (TMA). It's easy! Just follow the 10 steps below. Steps 1–5 address how to attract new people to our centers and groups, and Steps 6–10 address how to follow-up with newcomers.

Outreach in 10 Easy Steps

1. TARGET AUDIENCE

Think about the target audience for gateway programs. p. 3

2. ADVERTISING

Choose one new method to advertise TMA (or other program) this year.

Suggestions on postering, listing in local papers, and ways to distribute coupons, flyers and postcards (templates in toolkit CD)... p. 3–4

3. WEBSITE

Highlight programs for newcomers and avoid "insider" jargon. p. 4

4. TOOLKIT CD

Use the Toolkit CD to plan "before, during, and after" a gateway program.

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Experiment in ways to lower the cost of gateway programs.

- Ideas for discounts and special promotions... p. 6–7
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Plan a "bridge program" 4-6 weeks after each gateway program.
- List of possible bridge programs and suggestions for how to schedule in conjunction with gateway programs over a year... p. 8
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Use our "program report" to help track attendance and demographics. p. 9–11
8. COUPONS
Try coupons alongside announcements to illuminate the next step on the path. p. 9
- Sample coupon (electronic version in toolkit CD)... p. 12
9. LIST SERVE
Create a list of emails of gateway program participants for targeted mailings.
- Recommendations for using list serves effectively... p. 13
10. FOLLOW-UP EMAIL
Ask the instructor to send a follow-up email to participants.
- Sample email (electronic version in toolkit CD)... p. 14

Two More for Extra Credit

11. APPOINTMENTS
Consider appointing an Outreach Coordinator and/or Committee.
12. TMA ON THE ROAD
Consider organizing Turning the Mind into an Ally at an alternate venue.
- List of possible venues... p. 14

Did you receive a Toolkit CD?

The Toolkit CD is provided free of charge at the 2005 Shambhala Congress and is also available at Vajradhatu Publications (www.shambhalashop.com) for a \$10 USD processing fee.

STEP #1: Target Audience

A gateway is a program designed as an entry point. It provides an introduction to meditation and also exposes people to the Shambhala and Buddhist teachings, often for the first time. If we hope to attract newcomers to our Shambhala Centers and Shambhala Meditation Groups, we may need to pay more attention to external forms of advertising. Think about who might be interested in meditation and how your center could reach out to them. Is there a group that is underrepresented at your center? Where do people engaged in like-minded disciplines tend to gather?

STEP #2: Advertising

Start small and stick with it. Advertising requires a balance of event-oriented blitzes and establishing an ongoing presence. Bearing this in mind, choose one or two new methods to advertise Turning the Mind into an Ally (or other gateway program) this year. Consider what is most relevant and feasible for your center or group. Using our Program Reports (see Step #7), track if there is a noticeable difference in attendance.

Some advertising methods to choose from:

POSTERING

Postering can be fun! Recruit 3–4 young people to spend an evening of "hit and run" postering. One person drives while the others run out and put up posters. Have pizza at the center afterwards or go out for dinner together.

Good places to poster: cafes, bookstores, natural food grocers, Tibetan shops, yoga studios, alternative health clinics, fitness centers and more. Don't reinvent the wheel each time; keep a log of places where you poster!

Use the electronic version of our "Learn to Meditate" poster template in the Toolkit CD. The poster template is ready to go for Turning the Mind into an Ally, and you can also add 2–3 upcoming or ongoing programs. It's easy to adapt the poster template with Adobe Photoshop, either at home or at your local copy shop. All you have to do is enter in the program specifics and contact information for your center.

LOCAL PAPERS AND PUBLIC RADIO

Take advantage of free listings in the events section of local papers and free public radio announcements. It takes a little digging to do a survey of media options in your area, but it's worthwhile. (Look in the Toolkit CD for 1/4 and 1/8 inch newspaper ads, copy for events section of local paper, and a 30 second radio spot.)

Is the magazine *Natural Awakenings* in your area? The Birmingham Shambhala Center doubled its Open House attendance by advertising in this healthy living magazine. Find locations at: www.naturalawakeningsmag.com.

COUPONS

Everyone loves coupons! Distribute coupons at Open House when you make an announcement about the next Turning the Mind into an Ally or other gateway program. This reinforces the announcement and encourages attendance. (Look in the Toolkit CD for a \$10 off coupon template.)

FLYERS / POSTCARDS

Leave flyers or postcards at select cafes, yoga studios or other places where you poster. This gives customers the opportunity to take program information with them. Postcards can be printed at local print shops or a host of internet vendors that spring up constantly. Try www.compucolor.com or www.4over4.com for starters.

To save money, do bulk quantities. You can make several thousand postcards for gateway programs under the banner "Learn to Meditate" (electronic version in Toolkit CD) and then print labels for individual programs throughout the year. For "big name" programs, consider buying a mailing list, like *Yoga Journal*. You can do this through Pacific Lists. (For more details, consult the "Resources for Postcard Printing and Mailings" in the Toolkit CD.)

STEP #3: Website

Some Shambhala Centers report that half of their newcomers find them through the Web. Your website is one of the easiest forms of external advertising and worth any investment you put into making it user-friendly for newcomers.

DISPLAY GATEWAY PROGRAMS PROMINENTLY

List gateway programs on the homepage where new visitors to your website will find them right away. Gateway programs should always come first on any list of programs, so that newcomers are attracted to programs most suitable for them.

KEEP LANGUAGE ON WEBSITE SIMPLE

Avoid "insider jargon" in your program description. The description of an introductory meditation course needs to be understandable to the average person. It takes that extra moment to articulate the dharma in ordinary language. In order to reach a wider audience, we need to meet them where they are.

Be sure that the language on your website mirrors other forms of advertising. For example, the phrase "Learn to Meditate" could appear as a headline for gateway programs if you use our advertising templates. For Turning the Mind into an Ally, be sure that the short description from the poster is duplicated on the website.

STEP #4: Toolkit CD

What's Inside the Toolkit CD? It contains this document, *Guide to Outreach*, and tools for advertising, planning the program, and follow-up—all intended to be "turn key." The Outreach Toolkit is designed around Turning the Mind into an Ally (TMA), but many of its features can be adapted to other gateway programs.

Use the resources in the Toolkit CD:

- * to create posters, flyers, postcards, newspaper advertisements
- * to email the TMA curriculum to teachers and a checklist to the coordinator
- * to print and xerox coupons and evaluation forms
- * to electronically track participation demographics

Table of Contents for Toolkit CD:

ADVERTISING TEMPLATES FOLDER

How to Adapt Templates	TMA Coupon
"Learn to Meditate" Poster	Newspaper add (1/4 and 1/8 inch)
"Learn to Meditate" Postcard	Copy for events section of local paper/ radio spot
TMA Flyer	Resources for postcard printing and mailing

PROGRAM FORMATS FOLDER

TMA Curriculum (Secular and Buddhist)
TMA Coordinator Checklist
TMA Daily Schedule (sample)

FOLLOW-UP PROCEDURES FOLDER

Coupon for Participants	Program Report
Evaluation Forms	Follow-up Email (sample)

Adapting a template is easy! Just enter the program and contact information for your center or group and press print. If you don't already own Adobe Photoshop, it only takes an hour at your local copy shop to make changes and color prints. See the document, *How to Adapt Templates*, on the Toolkit CD for more details.

STEP #5: Pricing

Keep the hurdle low for gateway programs. We can cast our net more broadly if we lower prices for gateway programs. More people will feel invited into our Shambhala Centers with the side benefit of increasing the pool for internal advertising. Lower prices on gateway programs are also an important way to make meditation more accessible to diverse populations and people under 30 years old.

Finding the magic number:

What is the magic number that fills the shrine room and pays the bills? According to conventional logic, lowering the price for any "product" increases the demand (remember "supply and demand" in Econ 101). However, high standards create the image of a worthwhile product. So how high is too high? And how low is too low?

Pricing a program is a delicate balance between ensuring financial stability, conveying value, and fostering inclusiveness. We all agree in principle that the doors should never be closed to anyone because of cost. But we may need to set aside time to strategize about how to implement and communicate this principle effectively.

Ironically, since our programs generally have low incremental costs, it may be that lowering the price (or offering a scale of prices) actually produces more net revenue! For example, let us take a one-day meditation workshop, like Turning the Mind into an Ally, and simplify the costs for the sake of analysis to two features: an incremental cost of \$5 per person (food) and a fixed cost of \$100 (honorarium, advertising). In this case, 30 participants at \$40 each would produce more net revenue than 20 people at \$50 each, which in turn accrues more than 10 people at \$60 each.

Number of Participants	Program Price	Incremental Cost (\$5 per person)	Fixed Cost: Misc.	Net Revenue
5	\$60	\$25	\$100	\$175
10	60	50	100	450
15	50	75	100	525
20	50	100	100	800
25	40	125	100	875
30	40	150	100	950

EXPERIMENT 1: Lower Prices By 1/3 For Gateway Programs

Try lowering the prices for your gateway programs by 1/3 what they are now. It's a win/win situation. More people can afford to attend the program, and revenue increases. We all know that a shrine room feels better when it's full. Using our Program Reports (see Step # 7), track if there is a noticeable difference in attendance.

No "one size fits all" solution:

To decide on how to price gateway programs, each center and group needs to examine their pricing structure as a whole. If gateway programs are too much lower than other programming, newcomers might feel like there is a "bait and switch" tactic at work. Another option is to offer a mix of discounts, coupons and seasonal sales.

Other options to experiment in pricing:

EXPERIMENT 2: Student/ Under 30s Discount

Consider offering a "student/under 30s discount" at 1/2 the price of a gateway program. There is a strong interest in meditation and Buddhism among young people, but the high price of programs is prohibitive for many. To magnetize young people to our centers, a well-advertised discount policy is an excellent start.

EXPERIMENT 3: Special Promotions

Special promotions are an excellent way to lower the hurdle. You can offer a special promotion without impinging on your regular pricing structure. The New York Shambhala Center regularly sends coupons out with their brochure.

The Atlanta Shambhala Center recently started offering "seasonal sales" during slow periods of the year. Twice a year, they offer a Level I for half price and attendance has doubled. For more information, see Valerie Morvan's article, "A Seasonal Pricing Strategy," on page 9 of the *Outreach Bulletin*.

EXPERIMENT 4: Suggested Donation

A more radical approach is to offer programs using a "suggested donation" policy. The Baltimore Shambhala Center is a pioneer in this regard, and you can read about its success for more than a decade in Chris Kreeger's article, "Baltimore's Pricing Policy," on page 9 of the *Outreach Bulletin*. Inviting people to "pay what you can" is the most inclusive approach to pricing. And it can be offered across the board or for targeted programs, such as acharya visits or gateway programs.

Make your discount policy clear:

Discount policies need to be clearly stated and visible. Many centers offer unofficial discounts to those who inquire or use work-study as a way to accommodate people's budget constraints. Often, however, this is only for those in "the know." The point of discounts is inclusiveness! So put your policy front and center on all advertising and announcements.

STEP #6: Scheduling

How do we welcome people back after they attend their first program at a Shambhala Center or Shambhala Meditation Group? If we hold a program or event elsewhere, how do we invite people to visit our centers afterwards? There are a number of ways to make the path "sticky." And it all comes down to how we follow-up with newcomers. The second half of our "Outreach in 10 Easy Steps" address a few ways to do this, including scheduling, tracking, coupons, listserve and personal emails.

What is the next step after a gateway program?

The answer to this question is really up to each Shambhala Center and Shambhala Meditation Group. There is no set way that students first encounter meditation at our centers or find their way into one of our systematic presentations of the path, whether Shambhala Training or the Shambhala School of Buddhist Studies.

Nonetheless, you can still guide newcomers through the offerings at your center and create a "bright, clear path." The first step is to coordinate your schedule, so that a gateway programs are followed by some sort of "bridge."

How does TMA fit into your calendar?

How many times you offer Turning the Mind into an Ally (TMA) depends on the size of your center and your other offerings over the year. Many large urban centers offer TMA every other month, while smaller centers and meditation groups may only offer the program once or twice a year. Whatever the case, think about TMA and other gateway programs as part of a cycle of programs across the year. Gateway programs launch a seasonal or annual cycle. After Turning the Mind into an Ally (TMA) or other gateway program, it is important to plan a "bridge program" 4–6 weeks later.

What is a bridge program?

A bridge program is any program designed to support new meditators after their first introduction to meditation, through TMA or another gateway. This bridge can be a five-week course like the TMA Book Class, Working with Emotions, or The Battle of Ego. It can be a weekend program like Fearless Buddha/ Peaceful Warrior or an ongoing study or discussion group. See articles about "bridge programs" in Denver, Minneapolis, St. John's, Santiago, and Burlington on page 4 of the *Outreach Bulletin*.

The point is: when planning the calendar for the year, think about how a new student enters and moves through the offerings at your Shambhala Center or Shambhala Meditation Group. Ideally, your calendar for the year would create a flow between gateway programs, bridge programs and one of our two tracks, Shambhala Training and the Shambhala School of Buddhist Studies.

STEP #7: Tracking

How do you know if advertising efforts are working? If you have a consistent way to track the health of gateway programs, then your Shambhala Center or Shambhala Meditation Group can make informed decisions about advertising and pricing.

In the Toolkit CD, there is a Program Report designed to help track attendance and demographics. It should take the coordinator of TMA or other gateway program no more than 15–20 minutes to fill out. This can then be emailed to the Center Director and other relevant leaders at the center (Head of Practice and Study, Outreach Coordinator, etc.). Please see a sample Program Report on the following pages.

For the Program Report to work, you'll need to do two things. First, ask whoever registers participants to ask the question: "How did you hear about us?" This can be recorded directly onto the Program Report or noted down on a separate sheet and later tabulated.

Second, you'll need to create a folder on the desktop (or other obvious place) of your center's computer. These reports will be easier to find if they are stored electronically in a single folder, though it is also a good idea to make a hard copy.

STEP #8: Coupons

To help illuminate the next step on the path, why not provide a tangible reminder and incentive? A coupon is a handout, something newcomers take away. It lists 2–3 programs and offers a discount on them. You decide the amount of the discount and what programs to list by adapting our coupon template. (The electronic version can be found in the Toolkit CD. See a sample on p. 11.)

The coupon template provides a space for you to list upcoming programs at your center that are appropriate for a newcomer. The discount—\$25 off of whatever you choose—means that they won't lose it. They may even put it up on a bulletin board at home and spend a minute thinking about how and when they will use it.

Program Report

Please take 15–20 minutes at the end of the program to fill out this report so that your Center Director can track participation. This data is key to allowing your Shambhala Center or Shambhala Meditation Group the ability to make informed decisions about advertising and pricing. If possible, enter information digitally and email it to the Center director, Head of Practice and Study, and/or Outreach Coordinator

Name of Program: _____

Date: _____

Teacher: _____

Coordinator: _____

How was this program advertised?

- brochure/ newsletter
- listserve: to what group?
- flyers: where were they left?
- coupon: how was it distributed?
- posters (attach a list of places where you postered)
- newspaper: which one(s)?

How did participants hear about us?

Make sure you ask participants: "How did you hear about us?" or "How did you hear about the program?"

You can record their answers to this question directly onto this form during registration.

word of mouth _____
website _____
brochure _____
listserve _____
flyer _____
coupon _____
poster _____
newspaper _____

Demographics:

Price of program _____ Discount policy? _____

How many participants total? _____

How many under 30? _____ (estimate or use under 30s discount to calculate)

How would you characterize this program in terms of diversity?

Program Report

(continued)

Emails for program participants:

List emails here or type on a separate page and attach.

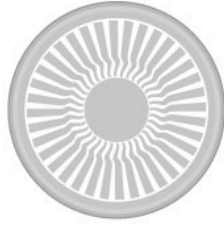
I will email this list to the teacher of the program in two weeks.

I have forwarded this email list to the person who manages our listserve.

How would you characterize the overall tone of the program?

This can be your own reflections or a synthesis of comments from participant evaluation forms.

Once you have filled out this form, save it as "Program Report" with the date added. Be sure to print a hard copy and also save it to the file where other Program Reports are kept. Look for a file called "Outreach Toolkit" or "Gateway Programs."



S H A M B H A L A
MEDITATION CENTER
OF [YOUR LOCATION]

\$25 OFF

With this coupon, receive \$25 off the following meditation program:

**Turning the Mind into an Ally:
Book Class - learn to meditate
in-depth over five-weeks**

The fundamental nature of mind is stable, strong and clear - yet these qualities get obscured by the stress and speed of our lives. Based on the national bestseller by Sakyong Mipham Rinpoche, this course introduces students to the view of meditation and how it works to develop mindfulness, clarity and insight.

At the Shambhala Meditation Center of [Your Location]. [Enter time and date]

Shambhala Meditation Center of [Your Location, address and telephone]
[Website]

STEP #9: Listserve

We tend to overuse email and flood listserve subscribers with announcements. This may be a self-defeating strategy since people tend to tune out when they receive too much email from one source. When it comes to your listserve: Less is more!

Try sending out a program announcement once a month or once a week. In a single email, you can provide an overview of your calendar, highlight important programs or community events, and include a warm note of welcome. If the table of contents is placed at the top, the recipient can choose to scroll down to what looks interesting.

March 2005 at the Shambhala Center

You are warmly invited to join us for the following programs this month....

- * Turning the Mind into an Ally, one-day meditation workshop
- * Shambhala Training Level One, The Art of Being Human
- * Deep Listening, a weekend with David Rome and Hope Martin
- * Community Gathering, a chance to discuss the Shambhala Congress
- * Six Paramitas, six-week course on the bodhisattva path

For advanced students...

- * Great Eastern Sun Class (open to Level Five graduates)
- * Vajrayogini Feast (time and date)

You may want to consider giving people options when they register for a program, sign up for your center's mailings, or become a member. Below is a sample of how to offer options for those interested in receiving regular mailings and updates.

Would you like to join our mailing list?

If so, please indicate which of the following you would like to receive.

- brochure (mailed twice a year)
- newsletter (mailed four times a year)
- program announcements (emailed once a month)
- community updates (emailed once per week)

A final note on managing a listserve: Use reminder emails sparingly and always clearly label the content of the email in the subject line.

STEP #10: Follow-Up Email

A simple follow-up email from the teacher of a gateway program can be a personal way to connect with new students and invite them back to the center. This email might include the following: a personal touchstone, an invitation to the regular Open House, a short list of suggested readings, an upcoming program for beginners, and an offer for meditation instruction (by someone at the center, not necessarily the teacher). In the Toolkit CD, you can find a sample follow-up mail as a starting point.

STEP #11 (extra credit): Appointments

If you are a large, urban center, you may want to consider appointing an Outreach Coordinator and/or Committee. This person or group would be responsible for overseeing publicity and exploring ways to enhance outreach at your center. The job of an Outreach Coordinator will vary depending on the priorities of each center.

STEP #12 (extra credit): TMA on the Road

Take TMA on the road to your local library, YMCA, college campus, hospital, continuing education locale, fitness center, yoga studio or other venue. This is an opportunity to meet people where they are!

If you do venture forth with TMA, please report your experience on the Outreach Forum. Click on "Congress" at the bottom left of shambhala.org. Then choose "Discussion Forums" from the menu at the top and scroll down to outreach.

About the Outreach Working Group:

Working groups were formed at the first Shambhala Congress in November of 2003, based on the issues and priorities brought by representatives of Shambhala Centers and Meditation Groups from around the mandala. Each group held meetings via conference calls in order to discuss the issue at hand and formulate a set of recommendations.

The Outreach Working Group decided early on that our objective would be to provide a set of resources for interested Shambhala Centers and Shambhala Meditation Groups. Thus was born the Outreach Toolkit. We also gathered "best practices" from around the mandala into the *Outreach Bulletin*. If you did not receive an *Outreach Bulletin* at the 2005 Shambhala Congress, a PDF version is included in the Toolkit CD.

Those who contributed as active or consulting members include the following individuals: Deborah Garrett, Brian Spielmann, Acharya Adam Lobel, Ravenna Michalsen, Valerie Morvan, Ann Cason, Betsy Pond, Sophie Maclaren, Magali Meneses, Peter Bancel, Kerry Conant, David Quinn, Meta Märtins, Hamish Anderson, Aaron Bihari, Seth Bregman, Bill Karelis, and Jane Arthur.

Chair of the Outreach Working Group: Holly Gayley
Design for Toolkit CD: Alden Karr