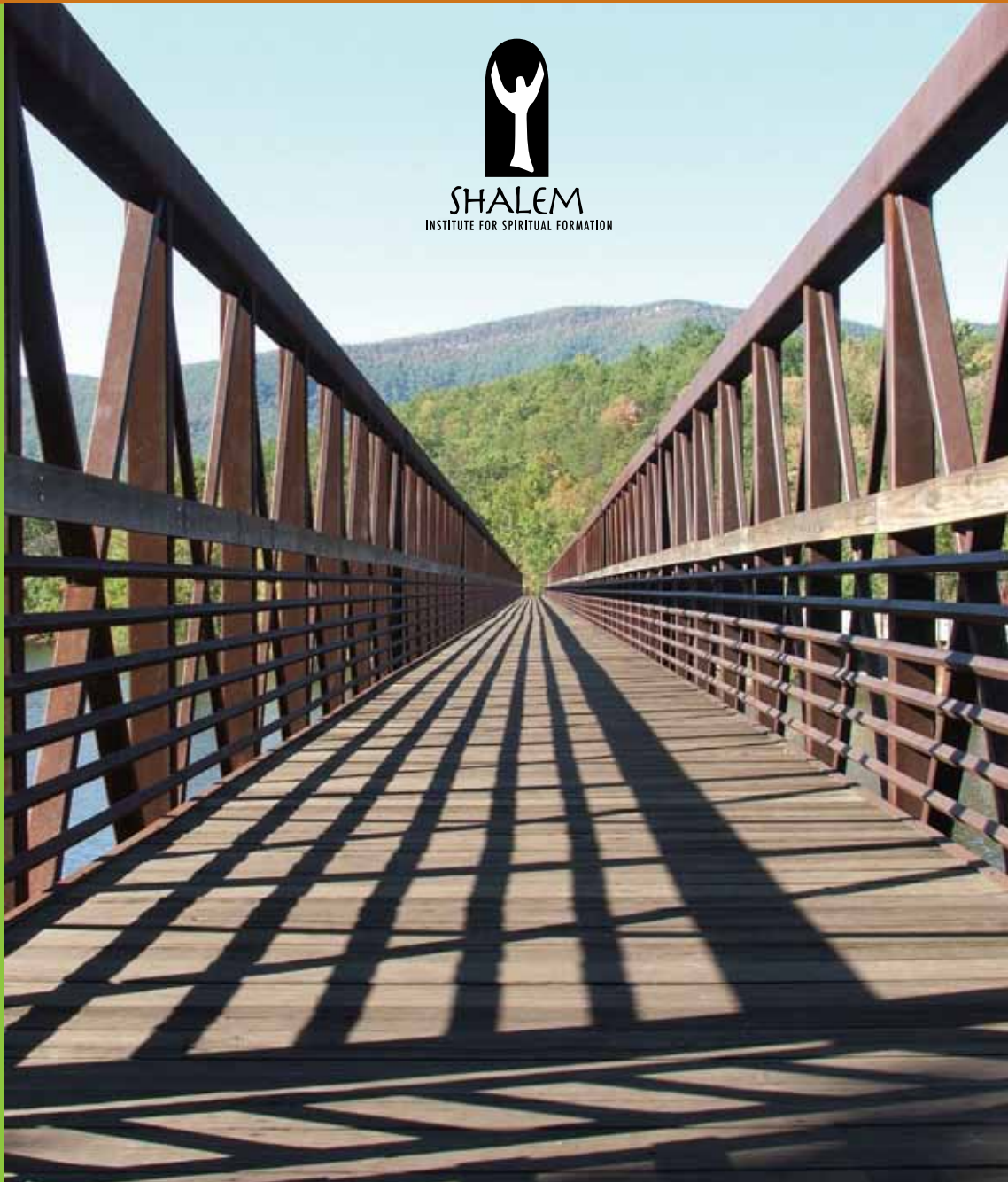


# *Challenge and Opportunity*



SHALEM  
INSTITUTE FOR SPIRITUAL FORMATION



ANNUAL REPORT FY09  
JULY 2008 TO JUNE 2009

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*Edited by Monica Maxon*

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# From Mansfield “Kasey” Kaseman

*Shalem President & Acting Interim Executive Director FY09*

This was truly a year of transition for Shalem. We entered the new year aware of a worldwide recession and a deficit budget related to policies and programs in need of critical review. Believing that a crisis is a terrible thing to waste, board and staff carefully planned a process balancing prayer and worship with thoughtful analysis of several options. We arrived at consensus for a reinvention that was consistent with our mission and responsive in new ways to Shalem’s needs.

It was a bold vision that was recalled for further prayer and deliberation upon the resignation of our executive director, Bill Dietrich. After many meetings and hours of prayerful consideration, we decided to reclaim the vision. I agreed to serve as acting executive director; Grace Cummings stepped into the presidency. Working closely with a transition task force and a remarkably committed staff, we were able to balance the budget, maintain the core programs and initiate new ones.

This administrative approach lasted 12 weeks and was overlapped by Leah Rampy, who was unanimously appointed by the board to serve as interim executive director. Among the evidence of the Spirit’s work is Leah’s sense of call to leave the corporate world for advancing the mission of Shalem.

The transition has been painful as we needed to terminate beloved staff members and reduce compensation. It also revealed hidden strengths and talents within the board that complemented the staff, and never have the board and staff worked more harmoniously together. I consider it a blessing to have participated in this transition, and I believe Shalem’s witness in our world is both needed and bound to grow, thanks not only to our dedicated staff and board but also to the prayers and contributions of our many friends.





# From Leah Rampy

*Current Executive Director*

My vantage point of Shalem for most of fiscal year 2009 was that of board member and chair of the program committee. It was not until June 2009 that I started to move into the role of interim executive director. But regardless of vantage point, it seemed clear that 2009 was a year of transition. Buffeted by a difficult economy, Shalem board and staff listened deeply for the Spirit's wisdom and then aligned to focus our energy, launch new programs and make difficult decisions. As we regularly reflected on Shalem's call, it seemed clear time and again that Shalem's offerings were needed in the world now more than ever.

Shalem reached out to the Washington, DC, area through the monthly Praying with the Mystics events offered free of charge in local churches. The Gerald May Seminar with Laurence Freeman and a workshop with J. Phillip Newell gave rich spiritual fare to our attendees. The first class of Deepening Contemplative Leadership and the annual Shalem Society gathering provided the opportunity for Shalem graduates to focus on what it means to be a contemplative leader. And Tilden Edwards and Carole Crumley journeyed to Korea where they supported an inspiring and amazing contemplative community.

More details on all these programs can be found in the following pages, as well as information on our long-term programs for clergy, spiritual directors, and leaders of prayer groups and retreats. Reading this report, you can see that our programs continue to make a difference to individuals and communities as we support contemplative living and leadership throughout the world.



# The program has been and will continue to be life-altering

*(Personal Spiritual Deepening Program)*

## SHALEM PROGRAM HIGHLIGHTS, JULY 1, 2008 - JUNE 30, 2009

### LONG-TERM PROGRAMS—FRESH OPPORTUNITIES FOR COMMUNITY & GROWTH

**GOING DEEPER**—Clergy Spiritual Life and Leadership is a 16-month program that supports congregational clergy and their desire to deepen their spiritual heart and the spiritual life of their congregations. Three different classes representing 10 different denominations, from 26 different states, the Cayman Islands and Cuba, were involved in at-home work or residencies during this year. Summer residencies provided a time for seminars, sharing, Sabbath, and interaction with program staff—Ann Dean, Bill Dietrich, Tilden Edwards, Sid Fowler, David Keller, Patience Robbins, Liz Ward, and Carole Crumley, who also is the program director. Kirstin Pickle was the registrar until April 2009, when Christine Jeffrey took over that role.

**LIVING IN GOD**—This was a transition year for Shalem's Personal Spiritual Deepening Program, which was created in 1992 to support living life more intentionally grounded in God and which this year included a wide variety of men and women—pastors, artists, teachers, business managers, therapists and homemakers. Patience Robbins, the program's director for the last five years, decided to step down after the 2009 class, and she and others began an envisioning process for this program that would entail taking it out to different regions in the country. Thus the class of 2009 became the last class in the current model, with residencies held in the Washington area. The final residency for the class of 2009 was in Fall of 2008, staffed by Patience along with Franklin Adkinson, Ann Dean, Bill Dietrich, Elizabeth Hill, Kristy Malochee, Mary Perschy, Leah Rampy, Elizabeth Tuckermanty, and Liz Ward, assisted by Clare Openshaw as registrar.

**NURTURING THE CALL**—The Spiritual Guidance Program is Shalem's longest running program, and fiscal year 2009 was a time of transition for it as well. Begun as a local program that changed to also involve those at a distance, with residencies locally, in 1983, this landmark program began offering both a summer and winter option. This year, after much discussion and prayer, we decided to return to one class per year. During this fiscal year, 76 people from 23 states and Canada were enrolled in this program. Gigi Ross moved from associate director to one of the program staff team and joined Douglas Battenberg, Amy Cole, Phil Cover, Bill Dietrich, Rose Mary Dougherty, Tilden Edwards, Ethel Hornbeck, Donald Krickbaum, Virginia Niemeyer, Charles Stephens, Phillip Stephens, and Liz Ward. Martha Campbell was the program director, in her fifth year of leadership, and Katy Gaughan the program registrar.





**TRANSFORMING COMMUNITY**—Shalem’s 18-month Leading Contemplative Prayer Groups & Retreats Program focuses on leadership of both groups and retreats, and during this year 44 men and women—pastors, physicians, office managers, retirees, nurses and teachers—participated in one of our two classes. New seminars (such as multi-faith practices and perspectives, leadership and social transformation, contemplative earth practices) also were added to the residencies and were well-received. In the last few years, the geography for this class has widened as well, and we have had participants from Canada, Hawaii, and South Africa, with a Cuban priest in the class of 2009. This was Ann Dean’s sixth year as director, and she was joined by staff members Marshall Craver, Carole Crumley, Bill Dietrich, Tilden Edwards, Jim Hall, Patience Robbins, Trish Stefanik and Liz Ward. Kirstin Pickle was the registrar for most of the year, replaced in the spring by Christine Jeffrey.

locations around the Washington metropolitan area. These evenings included a brief introduction to such mystics as Thomas Merton, Hildegard of Bingen, John of the Cross and John Woolman as well as prayer and reflection time together. Altogether 285 people participated in these evenings in fiscal year 2009, and we made plans to continue the popular series into 2010.

Two new groups were also offered in fiscal year 2009—**Deep Listening**, a group for executives, led by Leah Rampy in Virginia; and a **multi-faith group**, led by Ann Dean and Jim Todhunter and held in the Ratner Museum in Bethesda, MD. In addition, Shalem piloted a special new program, **Deepening Contemplative Leadership**, a three-month program created to encourage more trusting, risk-taking, Spirit-led leadership and open to Shalem graduates or other long-time participants.

## SHORT PROGRAMS—MANY NEW OFFERINGS FOR DEEPENING & NURTURE

*More than 800 people participated in Shalem’s short programs in fiscal year 2009, from the United States, Korea, South Africa, and Jamaica.*

**MID-ATLANTIC PROGRAMS** —This fiscal year saw several new **quiet days** in our program calendar: a chanting day with Isabella Bates, Jesse Palidofsky and Katy Gaughan; an election quiet day with Liz Ward and Merrill Carrington; and a special day with Rose Mary Dougherty on hope, longing and expectation. In addition, we held seven introductory days (for spiritual guides, retreat leaders, clergy, and for living more prayerfully) and two seasonal quiet days (in Advent and in Lent).

In January 2009 Shalem began a special series, **Praying with the Mystics**, a free evening led by different Shalem staff and board members and held once a month in various



# *I will never be the same. I both found myself and “got found”*

*(Spiritual Guidance Program)*

A special visit by poet, scholar and teacher **J. Phillip Newell** in April attracted nearly 100 people to his lecture and morning workshop on *A New Harmony: The Spirit, the Earth, and the Human Soul*. The setting and the day allowed for plenty of opportunity to share with this internationally acclaimed authority on Celtic spirituality as well as the chance for prayerful walking an outdoor labyrinth.

**SOUTHWEST REGIONAL GATHERING**—In February 2009, Shalem staff members, Carole Crumley, Bill Dietrich and Tilden Edwards, journeyed to San Antonio, TX for Shalem’s second Southwest Regional Gathering. They were joined by regional leaders—Mary Tom Hefte, Jackie Halstead and Tim Schumacher—and 36 participants. Shalem’s regional gatherings began in 2004 and have also been offered in the Midwest, West Coast, Northeast and Southeast. Always a mixture of graduates and newcomers to Shalem, they provide an opportunity for spiritual community, refreshment, and networking for those who share the vital vocation of spiritual leadership.

**SOCIETY FOR CONTEMPLATIVE LEADERSHIP**—The Shalem Society’s third annual gathering returned to the Seton Center in rural Maryland in October 2008,

where 39 participants and six staff spent a week together, in conference and in Sabbath silence. Once again, large posters of spiritual ancestors surrounded the meeting room, creating a sense of the larger community of contemplative witness and inspiration. Carole Crumley, Tilden Edwards, Dwight Fraser and Mimi Saayman shared their experiences in Korea, Jamaica and South Africa, witnessing to the present-day contemplative presence around the world. (Their full presentation can be found on Shalem’s website under Shalem Society, Resources/Keynote Speeches.)

**“WAYS OF FAITH,” FOURTH ANNUAL GERALD MAY LECTURE AND SEMINAR**—The Gerald G. May Seminar is offered in memory of the life and legacy of Gerald (Jerry) May and to strengthen the themes of contemplative understanding and practice that Jerry so valued. This year, Father Laurence Freeman, a Benedictine monk of the Congregation of Monte Oliveto and director of The World Community for Christian Meditation, was the invited guest speaker. The evening presentation and all-day workshop attracted more than 125 men and women to North Bethesda United Methodist Church in Bethesda, MD, where they heard Father Laurence explore the meaning of faith and its crucial connection to the spiritual and social questions of our time.

**“SOUL IN SEOUL”**—Invited by the Rt. Rev. Francis Park, the Anglican bishop of Seoul, Carole Crumley and Tilden Edwards flew to South Korea in late August 2008 to lead a six-day workshop/retreat. The gathering was modeled on Shalem’s regional gatherings and was greatly facilitated by the work of two Shalem graduates, Jonathan Kim and Hong-il Kim. The 46 participants included men and women, mostly clergy, from a variety of denominations—Anglican, Presbyterian, Methodist, Baptist and Roman Catholic—and the experience, all agreed, was richly blessed. As Carole Crumley said on return, “We realized that the Spirit had breathed on us and all our efforts and was accomplishing more than we could ask or imagine.”







## SHALEM COMMUNICATION— TRANSITIONING TO THE ELECTRONIC AGE

**LIVING IN LOVE**—Late summer 2008 saw the long-awaited publication of the compilation of Jerry May's newsletter articles, entitled *Living in Love*. Included in this volume are all of Jerry's articles, from 1978 to 2005, plus Forewords by Tilden Edwards and Rose Mary Dougherty, photos of Jerry, and quotes from his published works. This volume was several years in the making and could not have been undertaken without the generosity of all those who contributed to the Gerald G. May Memorial Fund since its inception in 2005.

**Shalem News & Shalem e-News**—Shalem's e-newsletter continued throughout FY09 as we sent out the monthly e-News to a list that steadily grew to over 2,000 people. During this year, we electronically communicated our upcoming events while drawing readers to special nuggets in our newsletter archives on our web site. Also, with the help of volunteer and board member Phil Stone, we began experimenting with videotaping, starting with the Gerald

May Seminar. Meanwhile, as the year progressed, we began to look seriously at the cost of producing our printed newsletter, a conversation that continued into the early months of the new fiscal year. Thus the Summer 2009 issue of our print newsletter, *Shalem News*, will most likely be our last in that form, with an eye to what might be possible for the future on the web and with our e-News.

## STAFF TRANSITIONS—IN GRATITUDE

With deep gratitude, we said goodbye this year to Martha Sherman, Director of Finance and Administration; Shannon Howard, Director of Development; Bill Dietrich, Executive Director; and Kirstin Pickle, Registrar for Shalem's Extension Programs. We also welcomed Pamela Thomas as Director of Finance and Administration, Leah Rampy as Shalem's Interim Executive Director, and Christine Jeffrey as Shalem's Program Registrar. We are thankful for the journeys that led Martha, Shannon, Bill, Kirstin, Pam, Leah and Chris to Shalem and feel richly blessed by all Shalem's staff members, who served Shalem so faithfully in fiscal year 2009.

## SHALEM IN THE NEWS

**Martha Campbell's** article, "Living with a Contemplative Heart," was published in the August 2008 issue of *Depth Soundings* (The Anchorage, Greenville, SC).

Fall of 2008 saw the publication of *Parenting: A Sacred Path/A Reflection Booklet for Personal or Group Use* (Center for Children and Theology, Washington, DC) by **Patience Robbins**, Shalem adjunct staff member.

In December 2008, staff member **Monica Maxon's** "Approaches to Spiritual Direction" was added to Alban Institute's *Congregational Resource Guide* on their web site.

**Shalem's Inaugural Prayer Circles**, created in early January 2009, spread to Vermont, Connecticut, New York, New Jersey, North Carolina and Arkansas and to the Fellowship of Prayer community.

"*Spiritus Contra Spiritum*," from *Shalem News* Winter/Spring 2008, was posted on the United Methodist Global Ministries web site in March 2009.

**David Keller**, Shalem adjunct staff member, published *Come & See: The Transformation of Personal Prayer* (Morehouse Publishing) in March 2009.

# It gave me the time to spend listening and discerning—a meaningful gift

(Advent Quiet Day)

Executive Director **Bill Dietrich** was interviewed by *Soul Talk Radio* in April 2009 (the interview can be found in the archive section at <http://web.mac.com/freesouls1/iWeb/FSP/Listen/Listen.html>).

Program graduate and Communications Committee member, **Tim Carrington** offered “The Practice of Work,” a Saturday workshop in the *Community of Reconciliation: Listening, Hearing and Living Series*, for the Washington Cathedral in May 2009.

## SHALEM ON THE ROAD

Starting in July 2008, staff member **Carole Crumley** worked contractually with *The Art of Spiritual Companionship* course, the community of reconciliation and the center for prayer and pilgrimage at the Washington National Cathedral in Washington, DC.

Staff member **Patience Robbins** led *Sacred Listening: Group Spiritual Direction at Ghost Ranch*, Abiquiu, NM, in August 2008.

Senior Fellow **Rose Mary Dougherty, SSND**, journeyed to Alaska in August 2008 for *Learning How to Live from Being with the Dying* at Central Peninsula Hospital and *Returning to Yourself in the Midst of Caregiving* for the Center for Creative Renewal. In March 2009 she led *Contemplative Living as a Way into Peaceful Living* at Tabor Retreat House in Oceanside, NY, and a retreat, *Springing into New Life*, at Dayspring Retreat Center in Germantown, MD.

In August 2008, staff member **Martha Campbell** went to Flatrock, NC, to lead *Living Flame of Love: Life in the Spirit According to St. John of the Cross* for The Anchorage. She also directed a retreat day for women at St. Peter's United Church

Senior Fellow **Rose Mary Dougherty's** new book, *Discernment: A Path to Spiritual Awakening* (Paulist Press), was published in May 2009.

**Tara Leporini**, Shalem staff member, launched a Shalem *Twitter* presence in May 2009, joining Shalem's Internet presence on Facebook, which was begun by Shalem board member, **Leslie Miller**, in summer 2008.

of Christ (Carmel, IN) in September 2008. And in November 2008, she led an *Ignatian Directed Prayer Weekend* at Bon Secours Spiritual Center in Marriottsville, MD.

Staff members **Gigi Ross**, **Ann Kulp** and **Katy Gaughan** led different evenings for the *Washington Grove Spirituality Group* series, Washington Grove, MD, in the Fall of 2008. **Katy Gaughan** also led a women's retreat, *Soul Song: Healing Rhythms of Life*, October 2008 in Mount Vernon, OH.

Shalem Founder **Tilden Edwards** offered *Living and Leading with the Mind in the Heart* in October 2008 for the Vineyard Guild Annual Retreat, Pittsburgh, PA. Along with Shalem graduate **Nancy Elder-Wilfred**, he led a regional retreat, *Living from the Radiant Heart*, in April 2009 at Notre Dame Spirituality Center in Ipswich, MA.

In November 2008, executive director **Bill Dietrich** gave a workshop, “Serenity and Peace in Times of Uncertainty,” in the Spa for the Soul Series at Trinity Wall Street, New York, NY. He also led a three-day retreat at Bishop's Ranch in Sonoma, CA, for students and faculty of the School for Deacons, Episcopal Diocese of California.



## ANNUAL FUND CONTRIBUTIONS

*Many thanks to the following Shalem friends who contributed gifts to our Annual Fund between July 1, 2008 and June 30, 2009— a total of \$286,676 from 738 people. Those gifts received after June 30, 2009, will be listed in next year's Annual Report.*

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# *I feel like I'm back in touch with my spiritual heart — God's presence*

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 Noreen Malone  
 Elizabeth Marcus

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 Mariscal  
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 Monica Maxon  
 Joan Maxwell  
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 Mary McGowan & Roberta  
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 Maureen McIntyre  
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 Brad Piergrossi  
 Cheri Pinner  
 Gene Pistacchio  
 Pauline Pittinos  
 Bianca Podesta  
 Edward & Marjorie Poling



# I have been nourished and re-energized for leadership (Regional Gathering)

Jane Politi  
Verdele Polson  
Jane M. Pope  
Margaret J. Porter  
Katherine Potter  
Catherine & Robert Powell  
Jean Preslan  
Donna Pritchard  
Judy Proctor  
Mary B. Pulick  
Paul & Judith Purta  
Mari Quint  
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Theodora Radcliffe  
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Lois Nell Richwine  
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Kathleen Riether  
Christine Riley

Kitty Riordan  
Kim Risedorph  
Patience Leiden Robbins  
Cindy Rogers  
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Marie Romejko  
Adela N. Rose  
Sarah Rossiter  
Mari Russell  
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Lynne Rychlec  
Mimi Saayman  
Robert A. Sabath  
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Barbara Sanderson  
Sonja Sandquist  
Kathleen & William Savo  
Eunice Schatz  
Meridith Schiffsky  
Mel Schlachter  
Margaret Tucker & David  
Schlafer  
June M. Schulte  
James & Myrna  
Schwarzlose  
Lyta G. Seddig  
Sandra F. Selby  
Luette G. Semmes  
Connie Seraphine  
Kenneth Servais

Bill Shaw  
Philippa C. Shepherd  
Carroll Anne Sheppard  
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Grace L. Smith  
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## GERALD G. MAY MEMORIAL FUND

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Elizabeth Tuckermanty

*We make every effort to acknowledge each donor. If an error has been made, we sincerely apologize and ask that you let us know.*

## TRIBUTE GIFTS FY08-09

<b>GIVEN BY</b>	<b>IN MEMORY OF</b>	<b>GIVEN BY</b>	<b>IN HONOR OF</b>
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June M. Schulte	Gerald May	Betty J. Turen	The Shalem Staff
Barbara J. Smith	Gerald May	Kit Turen	Kit Turen
Martha Starrett, OP	Paul & Theora Starrett; Auguste Barry	Lienhuong Vu	Marlene Maier, Nan Weir and
Gertrude Summers	Gerald May	Cynthia Byers Walter	Shalem's A-Team
Sara Beth Terrell	Cherry Partington	Robert Weisner	Rhoda Nary, Martha Campbell &
Charles Tucker	Helen Tucker	Jonathan S. Willis	Bill Dietrich
Naomi Tyler-Lloyd	Pastor Nathaniel Tyler Lloyd	Emily Wilmer	Sr. Mary Clark
Brad Van Fossen	Jack Van Fossen	Francie Woltz	Amy Cole
Jean Woods	Will McGee	Marilyn & Alan Youel	Paul Purta
Cecilia Marie Zondlo	The Zondlo/Tetlak Family	Betty R. Young	David G. R. Keller
			Kit Turen
			Tilden Edwards
			Ann Kulp

# Beautifully and gently led. . .

(Clergy Quiet Day)

## MARIE BABARE EDWARDS—A SPECIAL GIFT

Marie Babare Edwards, who died in December 2008, was not just the mother of Shalem's Founder, Tilden Edwards, but also a long-time supporter of Shalem, whose generous bequest to Shalem was acknowledged to us in fiscal year 2009.

Marie, a petite woman with boundless energy, always dropped by the Shalem offices whenever she visited the area. Ill health kept her near her home in recent years, and she died at home in Culver City, California, just before her 90th birthday.

Marie also was the author of a best-selling book, *The Challenge of Being Single*, which together with her workshops across the country, and national TV and radio interviews on that subject, led her to be regarded as a pioneering advocate for the rights and dignity of never-married, divorced, separated, and widowed single people. "The Singles Manifesto," with which she ends her book, is still considered relevant today, thirty years later.

*"I will do my part in every way to promote good will between marrieds and singles, because misunderstandings will be diminished only when each of us, as a unique human being, realizes that being self-aware, autonomous, free, self-fulfilled, and whole has nothing whatsoever to do with being either married or single, but, in the final analysis, comes from being ourselves."*

We give great thanks for the life and witness of this amazing woman and the enduring legacy she left to Shalem.



### WE GRATEFULLY ACKNOWLEDGE THE FOLLOWING MEMBERS OF THE SHEKINAH SOCIETY WHO HAVE PUT SHALEM IN THEIR WILLS—

Margaret Bullitt-Jonas  
Merrill Ware Carrington  
Carole Collins  
Jean Crawford  
John Denham  
Susan Dillon  
Tilden Edwards

Alan Evans  
Judith Favor  
Doris Froelich  
Joann Klink  
Ann Kulp  
Kirby Lewis  
Brooke Morrigan

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Don and Alixe Park  
Paul Purta  
Lisa Richey

Betty Stoddard  
Joan Stogis  
Jan Thurston  
Linda Toia  
Nan Weir  
Emily Wilmer  
Sandra Hay Wilson





## MAKING A BEQUEST TO SHALEM

WHEN MAKING YOUR ESTATE PLANS, WE HOPE YOU WILL CONSIDER A GIFT TO SHALEM. Over the past few years, we have been richly blessed by several bequests, some of them unexpected. Not only have they greatly assisted Shalem's mission and ministry, they are a very special way for the donor's care to extend into the future. The following are a few suggestions for planned giving. Always consult your legal advisor about long-term gifts.

BEQUESTS OF SECURITIES, CASH, REAL ESTATE OR OTHER ASSETS can be a convenient vehicle for continuing your current financial support of Shalem into the future or for making a new gift.

RETIREMENT ACCOUNTS that are qualified for charitable purposes can be very beneficial as a way to reduce certain retirement or inheritance taxes as well as a way to perpetuate the philanthropic support you provided Shalem during your lifetime.

GIFTS OF REAL OR PERSONAL PROPERTY can be given outright to Shalem or, for real property, as a life estate where you retain use of the property or income for life.

GIFTS OF LIFE INSURANCE can be made to Shalem when a policy is no longer financially significant to you or your family.

LIFE INCOME GIFTS allow you or your loved ones to receive income from a gift that benefits Shalem as well, perhaps more significantly than you could afford with an outright gift.

BY MAKING A GIFT THROUGH YOUR ESTATE AND LETTING US KNOW, you can become a member of Shalem's Shekinah Society. Please contact Monica Maxon at the Shalem office, 301-897-7334 or [Monica@Shalem.org](mailto:Monica@Shalem.org), if you would like more information about making a gift.

*Please let us know if you have included a bequest in your will or estate plan for Shalem. We'd like to say thank you and welcome you as a member of our Shekinah Society.*



## STATEMENTS OF FINANCIAL POSITION AND ACTIVITIES

The Condensed Financial Statements shown below were derived from the audited financial statements of the Shalem Institute for Spiritual Formation, Inc. These condensed statements do not include all disclosures normally included in financial statements prepared in accordance with generally accepted accounting principles. The complete financial statements, including statements of cash flows, footnote disclosures and the report of our independent accountants, Bond Beebe, CPAs, are available for review upon request.

CONDENSED STATEMENT OF FINANCIAL POSITION AS OF JUNE 30, 2009 AND 2008			CONDENSED STATEMENT OF ACTIVITIES FOR YEARS ENDED JUNE 30, 2009 AND 2008		
	2009	2008		2009	2008
<b>ASSETS</b>			<b>REVENUE AND SUPPORT</b>		
CURRENT ASSETS	<u>\$90,476</u>	<u>\$130,600</u>	Programs, contractual work		
INVESTMENTS			and publications	\$499,059	\$664,707
Temporarily restricted			Contributions	323,332	631,169
for facilities costs	-	-	Investment income (losses)	<u>(156,999)</u>	<u>(52,244)</u>
Board designated	<u>469,861</u>	<u>1,117,915</u>	<b>TOTAL REVENUE</b>		
<b>TOTAL INVESTMENTS</b>	<b><u>\$469,861</u></b>	<b><u>\$1,117,915</u></b>	<b>AND SUPPORT</b>	<b><u>\$665,392</u></b>	<b><u>\$1,243,632</u></b>
FIXED ASSETS	\$13,385	\$17,657	<b>EXPENSES</b>		
OTHER ASSETS			Programs, including allocated		
Contributions receivable in			staff compensation	979,557	1,129,101
future years	1,084	6,636	Administration:		
Other	<u>23,767</u>	<u>23,303</u>	Staff compensation & benefits	80,743	65,139
TOTAL ASSETS	<u>\$598,577</u>	<u>\$1,296,111</u>	Rent and other	171,719	183,139
<b>LIABILITIES AND NET ASSETS</b>			Fundraising expenses	<u>93,275</u>	<u>127,193</u>
CURRENT LIABILITIES	<u>28,868</u>	<u>\$66,500</u>	<b>TOTAL EXPENSES</b>	<b><u>\$1,325,294</u></b>	<b><u>\$1,504,572</u></b>
NET ASSETS			<b>Total Increase (Decrease)</b>		
Unrestricted	\$389,499	\$923,082	<b>in Net Assets</b>	(659,902)	(260,940)
Temporarily restricted	<u>180,210</u>	<u>306,529</u>	<b>NET ASSETS, Beginning of Year</b>	1,229,611	<u>1,490,551</u>
TOTAL NET ASSETS	<u>\$569,709</u>	<u>\$1,229,611</u>	<b>NET ASSETS, End of Year</b>	<b><u>\$569,709</u></b>	<b><u>\$1,229,611</u></b>
<b>TOTAL LIABILITIES &amp;</b>					
<b>NET ASSETS</b>	<b><u>\$598,577</u></b>	<b><u>\$1,296,111</u></b>			



## VOLUNTEERS & IN-KIND DONATIONS

While we greatly appreciate the monetary gifts from our community, we are also grateful for the many other ways our community gives to Shalem. In the past year, many have given of their time or have donated travel and program expenses.

- **Patrick Harris and Mel Shapcott, of Cyberian Frontier**, our web site managers, who donate much extra time and many special services to Shalem.
- **Frank Toia, Larry Glover-Wetherington, Greg Cochran, Don Krickbaum, Clark Lobenstine, June Schulte, Cam Busch, and Clare Openshaw**, whose photographers grace these pages, our newsletters and our web site.
- **Lorene Hegner**, whose beautiful, laminated bookmarks were given as a donation to Shalem.
- **Sue Clark and James Finan**, who volunteered regularly in the Shalem office and helped immensely with a variety of tasks.
- **Shalem's Board of Directors**, who donated endless hours overseeing and enabling Shalem's work in the world.
- Shalem's non-**Board Committee members**, who donated many hours and insights over the year: Tim Carrington, Amy Cole, Michael Cronin, Al Keeney, Margot Eyring, Suzi Kindervatter, Jack Upper, Erika Schleifman, and Elizabeth Ward.
- **Other individuals who made in-kind contributions:** Tom Acklin, Kathy Adams, Douglas Battenberg, Diane Britz, Martha Campbell, Sue Catalano, Cynthia Chappell, Sue Clark, Amy Cole, Phil Cover, Carey Creed, Michael & Ellen Cronin, Sue Czarnetzky, Ann Dean, Bill Dietrich, Rose Mary Dougherty, Jackie Dunlavey, Tilden Edwards, Gordon Forbes, Doris Froelich, Katy Gaughan, Jane Milliken Hague, Joan Hatcher, Ann Hisle, Ethel Hornbeck, Chris Jeffrey,

Barbara Kane, Mansfield Kaseman, Vivian Kilner, Suzi Kindervatter, Ann Kulp, Tara Leporini, Marjorie Lueck, Kristy Malochee, Leslie Miller, Doris Miller, Rose Monsell, Vicki Montgomery, Ginny Niemeyer, Jean Noon, Clare Openshaw, Jesse Palidofksy, Linda Pierce Knutson, Joan Pilat, Eileen Quinn, Leah Rampy, Patricia Richter, Gigi Ross, Bill Salvatore, Paula Sayers, Maureen Schneider, Debbie Scott, Martha Sherman, Charles Stephens, Elizabeth Ward and Sandra Wilson.

### WE GIVE SPECIAL THANKS TO—

- **The Noiles Family Foundation** for their support of Shalem's Clergy Spiritual Life and Leadership Project.
- **Trinity Episcopal Church Grants Program** for the "Deepening Spiritual Leadership" grant (for our Regional Gatherings).

### 2008-09 SCALE OF GIFTS

6	at	\$10,000+	\$98,154
3	at	\$5,000-9,999	\$20,100
14	at	\$2,500-4,999	\$27,072
58	at	\$1,000-2,499	\$60,424
37	at	\$500-999	\$22,878
66	at	\$250-499	\$16,613
246	at	\$100-249	\$28,753
160	at	\$50-99	\$8,277
104	at	\$25-49	\$3,500
38	at	\$1-24	\$905

**Total Givers**  
**738**

**Total Gifts**  
**\$286,676**



## OUR MISSION

To nurture contemplative living and leadership

## OUR VISION

Grounded in our understanding of God's desire for peace, wholeness and well-being, we envision a world transformed by contemplative living and leadership in which all people honor one another and creation, recognize their unity and interconnectedness, and courageously seek to live out of this reality.

## OUR VALUES

- Awareness that God is intimately present within and among us
- Reverence for the mystery of God's presence
- Desire for spiritual discernment in all things
- Radical willingness to trust God
- Respect for the unique spiritual path of each individual
- Recognition that contemplative living and leadership require spiritual support
- Commitment to action in the world arising from a contemplative orientation toward life

Shalem Institute  
5430 Grosvenor Lane, #140  
Bethesda, MD 20814-2142