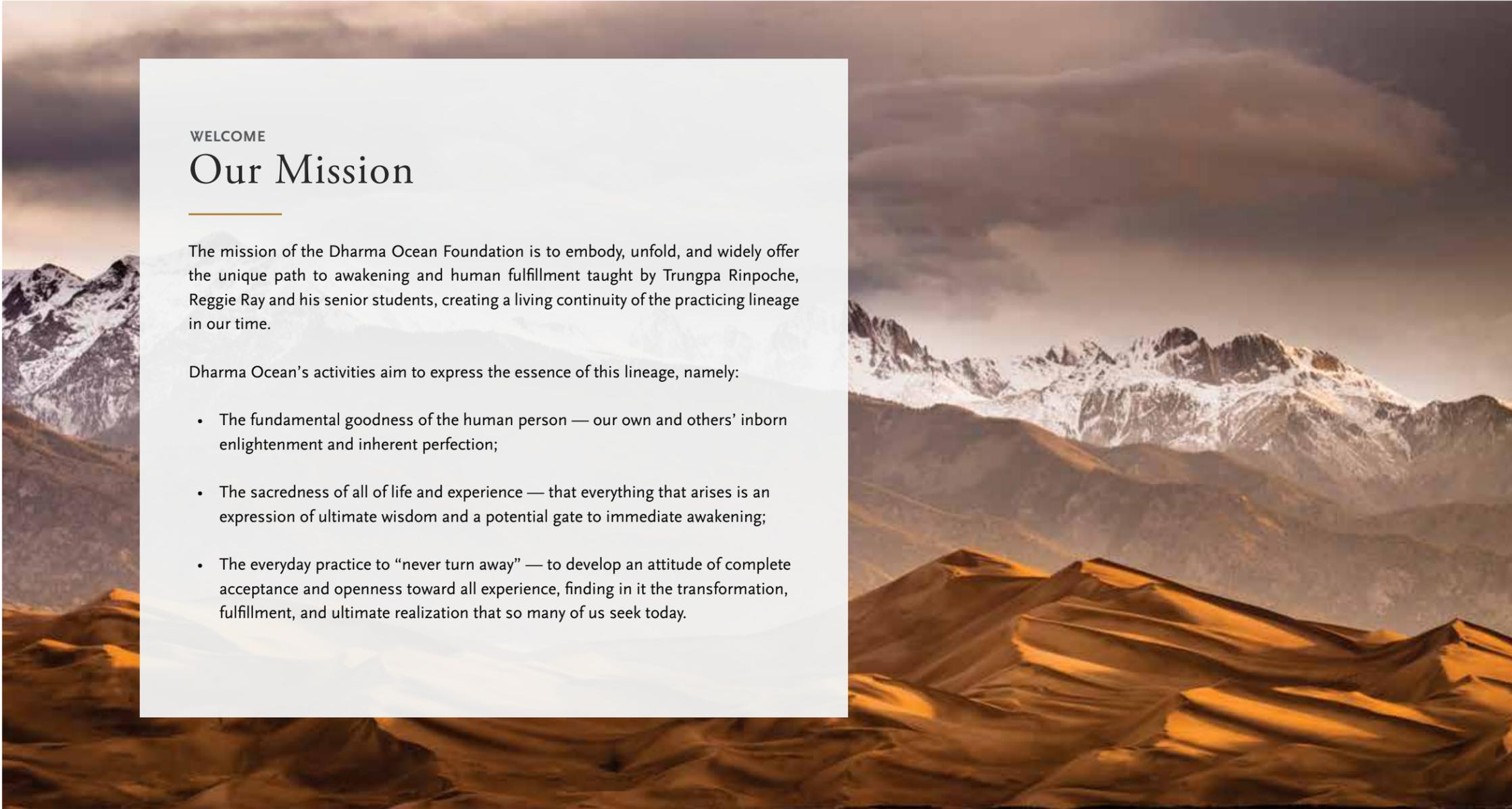




2017
Annual Report



DHARMA OCEAN



WELCOME

Our Mission

The mission of the Dharma Ocean Foundation is to embody, unfold, and widely offer the unique path to awakening and human fulfillment taught by Trungpa Rinpoche, Reggie Ray and his senior students, creating a living continuity of the practicing lineage in our time.

Dharma Ocean's activities aim to express the essence of this lineage, namely:

- The fundamental goodness of the human person — our own and others' inborn enlightenment and inherent perfection;
- The sacredness of all of life and experience — that everything that arises is an expression of ultimate wisdom and a potential gate to immediate awakening;
- The everyday practice to “never turn away” — to develop an attitude of complete acceptance and openness toward all experience, finding in it the transformation, fulfillment, and ultimate realization that so many of us seek today.

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WELCOME

Letters from our Co-Directors



David Iozzi
EXECUTIVE DIRECTOR
OF PROGRAMMING

Dear Friends,

Thank you for a wonderful year of practice, connection, and generosity. The devotion to your own life and the Dharma Ocean community that I and the staff have had the privilege to witness this year has been truly inspiring.

Dharma Ocean as an organization only exists to serve the community of meditators around the world, following the path of embodied spirituality. This year practitioners joined together in committed community through residential retreats, online programs, and local practice groups to support and encourage one another into the bravery, wakefulness, rejoicing and wildness of the journey.

In support of this, we refined our online offerings making the teachings widely available while continuing to offer our residential retreats. A new generation of teachers began to share their voices. Most remarkably, this summer Reggie empowered Caroline Pfohl as the prime lineage holder and his successor, bearing ultimate responsibility for developing, presenting, and activating the teachings of this lineage within Dharma Ocean and the world.

Please read on to join me in celebrating 2017!

David Iozzi

Dear Sangha,

I am delighted to be in this new role, acting as a liaison between the Boulder staff and the larger sangha.

We want to express our deepest gratitude to the many volunteers who make it possible for Dharma Ocean to offer teachings to people around the world. Our program volunteer staff extend themselves to program participants, providing individual and group support that is unique to Dharma Ocean. And we literally couldn't do it without them!

Over this past year, 111 community members served in 204 volunteers roles in our residential and online programs. This adds up to countless hours of service. In addition, volunteers help the organization move forward in many different areas by serving on our Mandala Councils and our Board of Directors.

Gaia Mika



Gaia Mika
EXECUTIVE DIRECTOR
OF COMMUNITY LIFE



ANNOUNCEMENTS

The Empowerment of Caroline Pfohl

On Saturday, August 12, 2017, on the tenth anniversary of Reggie asking Caroline to co-lead this lineage with him, he empowered her as the prime lineage holder and his successor. The empowerment ceremony took place during our annual Vajrayana Training Intensive with Ritro Gonpo presiding in the “mahamudra meadow” that many of you know and love above Blazing Mountain Retreat Center.

Caroline is the first fully empowered lineage holder who will do everything that Reggie does and beyond, and he has entrusted her with this community and lineage. Reggie and Caroline will continue to hold this lineage together as they have done for many years now, but she will carry on when Reggie is no longer able to, bearing ultimate responsibility for developing, presenting, and activating the teachings of this lineage within Dharma Ocean and the world.

“It’s said in our lineage that the successors are better than their predecessors. Caroline is going to hold this lineage, and already does hold it, in a way that is better than me. It’s more clear, it’s more pure, it’s more open, it’s more selfless. And that’s as it should be. It’s a sign that this lineage is really alive, and that it’s constantly evolving.”

– Reggie Ray

Photos by Blair Hansen and Scott Merriam

COMMUNITY

Volunteer Spotlight



Teri Pool
Volunteer Coordinator

The deepest teachings of this lineage occur when community members come together to support one another and to co-create sacred spaces of practice. 111 community members served in 204 roles (some serving in more than one role) to support those interested in engaging Dharma Ocean's training and path of practice and study. Thank you to all who volunteered in 2017!

Dharma Ocean events, both online and in-person, require all of us to succeed. This includes our community members, of course, but also dozens of volunteers and meditation instructors, teachers and media support, kitchen staff and mandalas councils, coordinators and promotions, BMRC staff, and the vision and teachings of Reggie and Caroline. This year, we wanted to include a specific volunteer to get a better sense of why they joined and what they learned, and Teri Pool was kind enough to speak with us about her experiences.

Q: What drew you to volunteer for Dharma Ocean?

A: I had been a member of Dharma Ocean for a few years when I found from a friend that I could volunteer. I loved the idea that I could give back to the sangha which had given me so much, and I felt it would be a good way to deepen my relationship with the lineage using skills I had accumulated over the course of my career. I had free time and was beginning to job hunt, so receiving the volunteer discount was also helpful.

Q: What did you enjoy about the experience?

A: I appreciated getting to know teachers, meditation instructors and staff from Dharma Ocean, and working with them to solve problems and celebrate the teachings and how they have changed our lives. To see the somatic approach applied in real-life situations has reinforced my decision to take refuge with DO. I think all participants in these programs would be inspired to see the mandalas sit with situations that arise throughout the course, from technical issues to questions that have not been encountered before. The connection is genuine, and I believe I have made friendships that will last the rest of my life.

Q: Would you recommend others volunteer?

A: Absolutely!

Q: Why?

A: For a couple reasons: If you need a scholarship to participate, this a great way to give back to the sangha in return. As I said, you also get a view of the sangha that is more intimate, especially if most of your experiences have been online, as mine have. It also drew me to my first retreat in Crestone this past March for The Body Loves with Caroline. I hope to be able to make space to volunteer as a coordinator for a retreat in Crestone someday in the near future.

Q: What kind of impact, if any, did this have on your own practice?

A: The experience deepened my practice. The teachings always seemed to coincide with something happening in my life at the time – I am experiencing many transitions right now, and the teachings and practices have carried me through them. I feel held by the sangha in a real way.



PROGRAMS

Retreats & Online Programs

We had a full year of 10 programs offering training in the full range of Dharma Ocean's path of practice both online and in-person. Our residential retreats offered opportunities for deep practice at all levels of the journey, and our online programs supported practitioners around the world to integrate the teachings and practices into their daily lives.

- **5 Residential Retreats at Blazing Mountain, with 4 breakout retreats**
 - 78 days of retreat
 - 417 retreatants (109 volunteers)
- **4 Online Programs**
 - Spanning 40 weeks of practice
 - 1,383 online participants (62 volunteers)
- **1 Residential Retreat in Canada**
 - 33 retreatants (7 volunteers)

All of our programs required the entire Dharma Ocean community and mandala in order to be successful. Thank you to all who served in roles supporting these programs and to the community for gathering to practice and share their experience.

PROGRAMS

Residential Retreats

MEDITATING WITH THE BODY™

The 2016/17 retreat was led by Manuela Mischke-Reeds, and the 2017-18 MWTB by Gaia Mika and Laurel Miller. Created for meditators of all levels, this in-depth training focused on a series of powerful body-based awareness practices.

Practitioners: 53

WINTER MEDITATION INTENSIVE

Neil McKinlay and Norman Elizondo co-led this month-long meditation retreat, engaging the journey of meditation more deeply for transforming our everyday experience by sowing the seeds of awareness. Blazing Mountain was filled to capacity for most of the one month retreat.

Practitioners: 162

THE BODY LOVES

Caroline Pfohl led this program exploring the tantric bodhicitta tradition of entering into the depth of our soma and opening our hearts, simply and directly, to everything that is. 80 people joined Caroline for this deep drop into the clarity of the heart.

Practitioners: 80

THE JOURNEY HOME

Neil McKinlay's program offered an expanded number of beds this year and still sold out in a just a matter of a few weeks. This week-long retreat explored the foundational methods of somatic meditation offered by the Dharma Ocean lineage, on the beautiful Salt Spring Island.

Practitioners: 33

VAJRA ASSEMBLY

13 students entered into the Vajrayana stage of their path having completed the prerequisite study and practice. The assembly was led by David Iozzi and Reggie Ray, who introduced participants to the core Vajrayana teachings and preliminary practices (ngöndro). The retreat concluded with Reggie offering transmission into the Dharmasagara lineage.

Practitioners: 26

VAJRAYANA TRAINING INTENSIVE

Dharma Ocean tantrikas and sadhakas gathered for the annual program to practice together. Reggie introduced a new cycle of teachings exploring rigpa practice. Four programs were offered within the VTI container, including Meditation Instructor Training, Vajrayana Practice Intensive, Vajrayana Practice of the Arts, and the Children's Program.

Practitioners: 96

PROGRAMS

Online Programs

AWAKENING THE BODY

This is the introductory course for the Dharma Ocean Foundation Courses. It was also the second time this course was offered. In it, Reggie introduced us to the path and practice of somatic meditation, through which we are shown a path of human transformation that is immediately applicable to our ordinary human lives. Jessika Daniel was the senior teacher who led the program.

Practitioners: 539

SOMATIC PRACTICE OF PURE AWARENESS

This is the second yana from our online Foundation Courses, and teaches the somatic practice of pure awareness. This is the simplest and also the most advanced teaching of the Tibetan tantric tradition. Pure Awareness saw 616 people join this 10-week course. Jessika Daniel was also the senior teacher for this course.

Practitioners: 616

SUTRAYANA I & II

The Sutrayana series, a two-part series led by senior teacher Neil McKinlay, continues to be a study and practice intensive. While it includes a great deal of practice, it focuses more on the philosophical underpinnings of this somatic, tantric lineage. Each part consisted of a 10-week course of study and practice engaged at home, deep within our daily lives.

Practitioners: 228



COMMUNITY

Mandala Councils

According to the early texts, the Buddha not only declined to set up any centralized organization or bureaucracy for his lineage, he flatly refused to do so. When the Buddha was close to death, his cousin, Devadatta, suggested that he set up a single authority, a single head, to act as supreme authority to manage and run the sangha. The Buddha explicitly and vigorously rejected this idea, saying that it would cause various problems for both individual practitioners and for the integral survival of his lineage as a whole. This goes along, of course, with the Buddha's emphasis on developing the inner authority and the awakening of each practitioner through meditation practice.

— Reggie Ray,
 "The Three Lineages," *Buddhadharma*, 2005

While the Buddha declined to centralize authority and emphasized the inner authority and awakening of each practitioner, he recognized the need for a container of like-minded companions, a community, that supported each other's journeys.

The Dharma Ocean community is organized around key areas of our lineage and interests of our community. Mandala Councils are comprised of community members who are inspired to offer their unique creativity, energy, and experience to lead and care for a particular aspect of our community's activities and well-being.

The mandala councils, teachers, staff, and board aspire to work with each other as a harmonious, organic and fully communicative whole, supporting one another in learning and service. Together, these groups are tasked with opening to the wisdom of the community and protecting its intelligence and integrity.

Rather than centralizing control, they become focal points for energy, helping to ensure that the flow of wisdom in the community is free, open, and unimpeded, that each voice is heard and that discussions at the "center" of a mandala are shared outwardly as transparently and as widely as possible.

Finally, serving in a mandala council is one way in which people can train in how to hold this lineage as leaders taking these teachings wherever they may find fertile ground. These are the councils as of the printing of this report. Undoubtedly, more councils will form in the coming years. Thank you to all who are currently serving and who served on a council in 2017!



COUNCIL MEMBERSHIP*

Education & Curriculum Mandala Council
 Bryn Rees

Vajrasangha Elders Mandala Council
 Susan Homer, Bruce Gaber

Wisdom Mandala Council
 Jeremy Lowry, Gaia Mika, Kirsten Roth

Inclusivity Mandala Council
 Jeremy Lowry, Christy Smith, Kathryn McNeil,
 Gaia Mika, Maria Vargas

Protection Mandala Council
 Norman Elizondo

Desung Mandala Council
 Jessika Daniel, Tina LaGreca, Katherine Walker,
 Colette Smart, Donald Stikeleather

Family Mandala Council
 Monique Rees, Elizabeth Astor, Tina LaGreca,
 Eva Freeman, Ati Nasiah

Chaplaincy Mandala Council
 Donald Stikeleather, Amy Stahl, Jonathan Daniel

Meditation Instructor Mandala Council
 Gaia Mika, Sara Houstoun, Marty Enright,
 Gayle Coleman

Vajrayogini Mandala Council
 Reggie Ray, Bryn Rees, Jessika Daniel, Amy Stahl,
 Justin Dituri

*This list is current as of the publishing date of the report.



DONATIONS & SUPPORT

Thank you

Dharma Ocean continues our work with the support of many in the community, from volunteers to staff to those who gather as practice sanghas the world over. In addition, our donors and supporting members continue to offer vital financial support that enables all these other pieces to come together. These gifts directly fund the many ways that we are engaging our world, from the development of new curriculum to the media and technology infrastructure that support our online programs, teaching library, and other resources.

Through the generosity of the our community's donors Dharma Ocean was able to offer financial scholarships totaling more than \$48,000 for our residential programs and \$45,000 for our online programs. Thanks to a grant from the Hemera Foundation, we were also able to offer another \$51,000 in contemplative fellowships to educators, healthcare professionals, and artists. In total scholarships and fellowships allowed 106 residential and 343 online participants (449 total) to experience the dharma, who otherwise might have been excluded.

To all who chose to support us and help us spread this dharma, we offer our gratitude and humble service.

| Financial Aid | Amount |
|-----------------------------|------------------|
| Residential Scholarships | \$48,302 |
| Online Scholarship Tuitions | \$45,360 |
| Hemera Fellowships | \$51,027 |
| Total | \$144,689 |



RETREAT CENTER

Blazing Mountain Retreat Center

Dharma Ocean's Blazing Mountain Retreat Center (BMRC) is a home for the practice of deep retreat for our community. The staff at Blazing Mountain provided the support necessary to host all but one of our residential programs in 2017, and saw to the care, protection, nourishment, and spiritual well-being of hundreds of people over the course of the year.

While the center is primarily for our community's deep retreat, we also rent it to other organizations when we're not using it. Nine contemplative groups were hosted by BMRC, including the 2017 Gen X Buddhist Teachers Conference. These rentals allow us to provide a retreat home for a variety of other wisdom traditions while also recovering the annual operating and maintenance costs, which our own programming does not fully cover. This combined service, for us and for the larger community of non-Dharma Ocean spiritual practitioners, allows BMRC to be a sustainable resource for our longterm use and growth.

COMMUNITY

Practice Groups

Dharma Ocean is a community of meditators around the world, following the path of embodied spirituality. A network of practice groups throughout the world provide opportunities to study the teachings and practices of the Dharma Ocean lineage with others who prioritize the practice of somatic meditation in their lives.

There has been a growth in the number of the practice groups due to the online courses. Each practice group has its own uniqueness, needs, and challenges. Many have become cradles for practitioners to develop a deep friendship and support for each other on this practice path.

Thank you to all who lead or facilitate practice groups.



THE BANGKOK SANGHA

Dharma Ocean has dozens of independent practice groups all over the world. One of our teachers, Ru-Jün Zhou, visited Vichak Panich and the Thailand practice group to share and participate in some of the Bodhichitta practices. At the end of the retreat, eight of the sangha members took the Bodhisattva Vow. Reggie reached out to Vichak personally, in September, with the following letter:

To the Vajrasiddha sangha:

All of us in practicing lineage, worldwide, owe you and your exceptional teacher, Vichak Panich, a great debt of thanks and appreciation for creating Vajrasiddha, such a beautiful place of practice in Bangkok.

It is so very important that there is now a center where people can come in the midst of busy lives in the city in order to meditate according to the teachings of Lord Buddha and discover the deepest meaning of their human birth.

The simplicity and pristine beauty of your meditation hall strongly reminds me of our meditation room at Blazing Mountain in Crestone. I can feel the energy of the lineage in your meditation hall and throughout your center. And I can feel Trungpa Rinpoche's presence. And right now I am feeling myself there, with you, sitting in the profound and vast peace of the awakened mind.

Vajrasiddha: the name of your center is perfect: Vajra, the indestructible wakefulness that is present, right now, in each of our hearts. And siddha, referring to all of us as household practitioners, that in our lineage of mahasiddhas we aspire to realization in our situation as people in the world.

Surely Trungpa Rinpoche is smiling over you and over us all. Again, thank you from the bottom of my heart for what you are doing.

Sending Warm Regards in the Practicing Lineage

*Reggie Ray
September 4, 2017
Boulder, Colorado*



UNITED STATES

CALIFORNIA

Los Angeles: Abby Brammell

COLORADO

*Boulder: Laurel Miller
Durango: Elisabeth Peterson*

D.C. & MARYLAND

David Evans, Bruce Gaber

HAWAII

Maui: Jenna Harrison

INDIANA

Indianapolis: Donald Stikeleather

NEW MEXICO

Taos & Sante Fe: Gaia Mika

NEW YORK

*New York: Tina LaGreca, Marty Enright
Rochester: Christy Smith
Westchester: Julie Farmer*

NORTH CAROLINA

Mary Stokes

OREGON

Portland: Amy Stahl

TENNESSEE

Nashville: Jake LaBotz

TEXAS

Austin: David Longoria

WASHINGTON

*Seattle: Skye LaChute, Kirsten Roth
Tacoma: Callista Brown*

CANADA

BRITISH COLUMBIA

*Vancouver: Katie Hill, Patti Thompson
Victoria: Neil McKinlay*

QUEBEC

Montreal: Caroline Roger

ONTARIO

*Ottawa: Tanya Riley
Toronto: Sara Houstoun*

EUROPE

UNITED KINGDOM

*Alston: James Gillespie
Cumbria: Paul Sibson
London: Julie Larner, Ian Sturgess
East Sussex: Alistair Appleton
Devon: Julia Collins
Inverness, Scotland: Maggie Wallis
West Sussex: Frank Brzeski
Bristol: Petrina Yeoh, Jon Young*

IRELAND

Galway: Seán Harnett

FRANCE

Paris: Linn Lillsunde

ASIA-PACIFIC

AUSTRALIA

*Brisbane: Sandra Hotz
Sydney: Lizzie Fuller, Ali Tahayori*

NEW ZEALAND

Queenstown: Alan and Annette Macalister

THAILAND

Bangkok: Vichak Panich, Usanee Nuchanong

ADMINISTRATION

Board & Staff

Spiritual Directors

Dr. Reginald A. Ray
Caroline Pfohl

Board of Directors

Michael Mischke-Reeds, Chair
Rayann Gordon, Secretary
Schuyler Anderson, Treasurer
Jeremy Lowry
Bryn Rees

Co-Executive Directors

David Iozzi, Programming
Gaia Mika, Community Life

Programs

Steve Robbiano, Programs Manager
Karyn Young, Programs Manager
Lola Davis, Assistant Programs Manager

Practice Communities

Ru-Jün Zhou, Coordinator of Indra's Net

Media

Donald Harrison, Media Manager
Jonathan Daniel, Archives Manager

Online Presence

Scott Merriam, Digital Platform Manager
Derek Jones, Web & IT Coordinator

Publications & Promotions

Keith Martin-Smith, Promotions Manager
Liz Shaw, Managing Editor

Blazing Mountain Retreat Center

Becca Perry, Retreat Center Manager
Kathy Grant, Facilities Manager
Anoushka Perkert, Kitchen Manager
Julia Corlett, Asst. Kitchen Manager
Kevin McNerney, Media Coordinator

Administrative Staff

Mary Neumann, Controller
Rosie Sullivan, Office Manager



ADMINISTRATION

Financial Statements

As indicated by the Statement of Financial Position on the following page, Dharma Ocean has a strong balance sheet, with its major assets being the Blazing Mountain Retreat Center (BMRC) buildings and property, unencumbered by debt.

The large positive change in net assets was due to award of a 1MM 5-year grant that accrued in its entirety in 2017. Without the grant, we had a nearly break-even year, allowing us to maintain a healthy cash balance, which we will reinvest into our programming and the growing community in the coming years.

Our core retreats and online training programs remained our greatest source of revenue covering about half of our operating expenses. Rental income from hosting other contemplative groups at BMRC remains a significant source of earned income (15%). Individual donations, grants, and supporting memberships bridged the gap contributing 35% of our revenue.

Supporting services remain a low percentage (18%) of our overall expenses which are predominantly programming-related. In the Statement of Activities, personnel and expenses directly associated with our programming are allocated to programming. Eighty-two percent of our expenses go towards fulfilling our mission.



Dharma Ocean Foundation
Statement of Financial Position
12 Months Ended December 31, 2017

| | <u>12/31/2017</u> | <u>12/31/2016</u> |
|---|----------------------------|----------------------------|
| ASSETS | | |
| Current Assets: | | |
| Cash and cash equivalents | \$ 1,071,352 | \$ 863,770 |
| Accounts Receivable | 800,254 | - |
| Inventory | 8,144 | 9,846 |
| Prepaid expenses and other assets | (1,566) | 9,742 |
| Noncurrent Assets: | | |
| Land, buildings, and equipment, net | 5,261,467 | 5,210,209 |
| Deposits | 3,860 | 3,860 |
| Donated Items | 900 | 900 |
| TOTAL ASSETS | <u>\$ 7,144,412</u> | <u>\$ 6,098,326</u> |
| LIABILITIES AND NET ASSETS | | |
| LIABILITIES | | |
| Current Liabilities: | | |
| Accounts payable and accrued expense | \$ 22,912 | \$ 31,096 |
| Credit card liabilities | 13,016 | 17,631 |
| Payroll liabilities | 51,146 | 50,944 |
| Sales tax liabilities | 2,993 | 1,627 |
| Program deposits and credits | 353,508 | 287,045 |
| Other liabilities | - | - |
| Noncurrent Liabilities: | | |
| Notes payable | - | - |
| Total liabilities | <u>443,576</u> | <u>388,345</u> |
| NET ASSETS | | |
| Unrestricted | 5,768,303 | 5,543,951 |
| Temporarily restricted | 932,532 | 166,030 |
| Permanently restricted | - | - |
| Total net assets | <u>6,700,836</u> | <u>5,709,981</u> |
| TOTAL LIABILITIES AND NET ASSETS | <u>\$ 7,144,412</u> | <u>\$ 6,098,326</u> |

Dharma Ocean Foundation
Statement of Activities - Allocated Expenses¹
12 Months Ended December 31, 2017

| | |
|---|----------------------------|
| REVENUES | |
| Contributions | |
| Supporting Membership | \$ 205,109 |
| General Operating Grants | 1,000,000 |
| Individual Donations (Unrestricted) | 159,817 |
| Individual Donations (Restricted) | 4,605 |
| Scholarship Donations | 10,459 |
| Fellowship Grants | 100,000 |
| Other Contributions | - |
| Total Contributions | <u>1,479,990</u> |
| Programming Revenues | |
| Dharma Ocean Programs | 983,438 |
| Co-produced Programs | 9,690 |
| Facility Rental | 284,413 |
| Media | 2,821 |
| Total Program Revenue | <u>1,280,361</u> |
| Other revenue | <u>1,517</u> |
| TOTAL SUPPORT AND REVENUE | <u>\$ 2,761,869</u> |
| EXPENSES | |
| Supporting Services | |
| Personnel & Other ¹ | \$ 179,150 |
| Admin Offices and Boulder Center ¹ | 130,150 |
| Board of Directors | 5,723 |
| Total Supporting Services | <u>315,023</u> |
| Fundraising | |
| | - |
| Programming Services | |
| General Programming Costs | 429,208 |
| Dharma Ocean Programs | 556,465 |
| Co-produced Programs | 21,990 |
| Facility Rental | 124,631 |
| Media | 101,245 |
| Promotions | 122,867 |
| Scholarships Awarded | 48,302 |
| Fellowships Awarded | 51,027 |
| Total Program Services | <u>1,455,736</u> |
| TOTAL EXPENSES² | <u>\$ 1,770,758</u> |
| Change in Net Assets | 991,111 |
| Net assets at beginning of year | <u>5,709,725</u> |
| NET ASSETS AT END OF PERIOD | <u>\$ 6,700,836</u> |

1. Labor and expenses have been allocated to Programming Services and Fundraising.

2. Depreciation was not calculated at the time of these financials and is not included.

Notes

