

"To Ensure the Future of the West Virginia Institute for Spirituality"

A Two-Year Strategic Plan for the West Virginia Institute for Spirituality
Effective January 1, 2026, to December 31, 2027

Approved by the West Virginia Institute for Spirituality Board of Director
On April 16, 2026

WVIS Strategic Plan (2026–2027)

This strategic plan was presented to the West Virginia Institute for Spirituality Board of Directors on April 16, 2026, with the starting date of January 1, 2026 (if approved) and ending date of December 31, 2027. While typically a Strategic Plan would be for a 3-year period, it was the recommendation of the Strategic Planning Committee that with a change in leadership and an expansion of involvement by the WVIS Board of Directors, a 2-year plan provided WVIS with greater flexibility during the transition.

From the multiple priorities discussed during the Strategic Planning Meeting (September 5-7, 2025), the following three priorities were chosen, and individual subcommittees were selected for each priority. It is the work of these subcommittees that is elaborated in this plan.

I. The Ministry

To increase participation in WVIS programs and strengthen the formation pipeline for spiritual direction training programs.

Strategies: Develop structured recruitment strategies to build and develop a recruitment pipeline, expand program offerings, strengthen and leverage relationships, and increase outreach to different denominations.

Key Actions: Host a Come & See Event (in Fall and Winter of year leading up to new spiritual direction training cohort – every 2 years), provide directors with training (especially new directors) on how to invite to attend the Come and See Events, update brochure with new ecumenical language.

Measures of Success: Increased participants (for spiritual direction) and increased applicants to spiritual direction training programs

Progress to Date:

Come and See Event was held February 26, 2026, and March 1, 2026: 17 people registered, 13 attended, four (to date) of those who attended have begun the application process to be part of the 2026 cohort for initial spiritual direction training.

II. Expansion of Retreat Ministry

To broaden reach through targeted and mission-driven retreats.

Strategies: Develop audience-specific retreats and expand partnerships with targeted organizations (J-LAP, hospice, hospitals, nurses, caregivers, etc.) where there is an overlap of need and WVIS expertise.

Key Actions: Identify target groups, pilot retreats, evaluate ROI and feasibility based on WVIS Director/Faculty capacity.

Measures of Success: Increased retreat participation, hold 2-3 targeted retreats, and increase new retreat audiences.

Progress to Date:

Executive Director engaged CARLA (the Charleston Area Religious Leaders Association), attending 2 meetings and hosting one of them at WVIS; she also led a WVIS-hosted retreat day for OCIA Candidates and Catechumens from the Sacred Heart Co-Cathedral Parish in Charleston, introducing them to the house and the offerings (spiritual direction, retreats, etc.)

III. Ecumenical Engagement

To expand identity and outreach through ecumenical relationships.

Strategies: Build relationships with Protestant clergy (specifically Lutheran, Episcopalian, Methodist, and Presbyterian) and organizations, increase visibility.

Key Actions: Executive Director to meet with the Episcopal Bishop, target to speak to at least one Episcopal, Methodist, and Presbyterian church in 2026, and increase presence in ecumenical networks: CARLA (Charleston Area Religious Leaders Association), – 4 meetings in 2026; WV Council of Churches – 1 meeting in 2026

Measures of Success: Increased participation in programs, retreats, and spiritual direction training programs from diverse Christian (non-Catholic) communities.

Progress to Date:

The Sub-Committee has created a list of Protestant spiritual writers, to be incorporated over the next three years on the WVIS website and in advertising brochures. The list was created with input from Protestant faculty members and current student interns. In addition, Rev. Meredith Hutchinson, retired UCC minister, has reviewed the current WVIS website for exclusive and/or “off-putting” phrases and submitted her findings to the Director of Operations, who has updated the website. Finally, at the suggestion of the committee, teaching faculty have begun to drop the “St.” titles when referring to Christian spiritual figures from the past.

IV. Marketing & Communication

To increase awareness through modern marketing and communication strategies.

Strategies: Multi-platform marketing, expand digital communication strategies.

Key Actions: Update website, brochures, bulletin announcement and general messaging to include increased ecumenical and multi-generational language, research effective use of, and expand use of social media, and develop video content. Identify targeted pathways for distribution of marketing content

Measures of Success: Increased engagement in spiritual direction, retreats, and program participation by target audiences.

Progress to Date:

Update of website and brochures is on-hold pending additional information from the Ecumenical Committee

V. Board Development & Oversight

To strengthen the engagement of the WVIS Board of Directors to support long-term sustainability.

Strategies: Update and clarify WVIS Bylaws, expand board size to a total of 10-15 members with varied and strategic expertise, introduce committee structure with goal of increased engagement.

Key Actions: Recruit members, review bylaws, implement board training.

Measures of Success: Stronger, more diverse, and engaged board.

Progress to Date:

- WVIS Bylaws were updated and approved by the current WVIS board at the January 22, 2026, Board meeting.
- Six new board members have been identified and are being presented to the board for consideration and onboarding in July 2026
- Applied for a grant to provide funding for a late 2026-early 2027 board training weekend.

VI. The Facilities

To continue to maintain, replace, and upgrade the Retreat House/Headquarters of WVIS

Strategies: Evaluate existing maintenance plan and make adjustments as needed, make needed repairs, replacements and upgrades. Continue monitoring the technology of the WVIS Headquarters to ensure WVIS efficiently uses technology for the delivery of our mission.

Key Actions: Ensure the annual budget allocates funds to cover prioritized maintenance plan of planned (and unplanned) repairs, replacements, and upgrades, create and publish a “Wish List” for prospective donors related to repairs, replacements, and upgrades, review and revise on an ongoing basis the technology at WVIS and upgrade as necessary.

Measures of Success: WVIS has adequate funds in annual budget (without unexpected need to use reserves) to fund projected repairs, replacements, and upgrades.

Progress to Date:

- Currently upgraded plumbing in lower-level bathroom

- Plans in place to make electrical upgrades identified in 2025 House Inspection Report related to “Ring Cameras”

VII. Fundraising

To continue to review and revise the existing plan for fundraising.

Strategies: Create, update, and add to the “Wish List” for prospective donors, build the financial reserves of WVIS to anticipate future operational costs

Key Actions: Review and update language and identify strategies to promote guidelines for our endowed program(s), identify donors who can provide scholarship funds to increase participation in WVIS spiritual direction training programs for those who are strong candidate without adequate resources, create a donor recognition program, publish an annual report in the Fall of each year

Measures of Success: Measure the financial reserves each year by marketing the numbers of the annual report

Progress to Date:

- These strategies, key actions, and success metrics were part of the previous Strategic Plan and will require review