

# Mandala Governance and Structure Working Group

## Core Services Recommendations

### Summary

The central administration has endured a period of tremendous hardship and dissolution. Meanwhile, a core staff of devoted and extremely hard working practitioners have continued to provide the best possible stewardship on behalf of the mandala.

In order to support the rebuilding of our central administration, our working group's objective was to identify and prioritize those core services and support needed in our city, retreat and practice centers that are most logically provided by mandala-wide solutions. We identified services to be added to, not replace, those valuable services currently being provided.

In this process, we did assessment by email and telephone with leaders from centers in North America, South America and Europe. Details about our assessment process are presented in the accompanying Core Services Report. Also in the Core Services Report, in the section on findings, we list a few circumstances arising from the process that in themselves are noteworthy.

Services are listed in rank order according to the priorities identified by center and group leadership.

In summary our recommendations for additional core services are:

1. Increased teacher and instructor training organized by regions
2. A platform and process for sharing Best Practices
3. Facilitating more Acharya visits
4. Centralized publicity materials and templates
5. Help Desk
6. Translation capability increased and coordinated

## **Introductory Comments**

### Existing Services

There was explicit widespread agreement that the shared services currently being provided are critical and should remain in place if possible. We are recommending services that would be added on top of the current mix.

### Funding

We assume these additional services will primarily be provided through increased volunteer staffing, at least until debt is retired or funding significantly increases.

## **Caveats**

### Core Services from other working groups

There will also be recommendations from other working groups that may include additions to core services. If our report had been amended to include those, it would be difficult to assign relative priorities amongst the various needs for resources. Rather than attempt that, we have presented the results of our process in a way that reflects the actual prioritized input of centers as of June/July 2004. We do this so it's clear to readers what center leadership identifies as priorities. We think it's important that that be communicated directly rather than interpreted or interspersed with input from other groups. Our priorities will have to be considered alongside those of other working groups in order to set priorities mandala-wide.

### Important Additions to Our Practice Path

Most of our input came before the new Shambhala Buddhist Ngondro was introduced. It seems clear from informal feedback since then, that these developments raise the importance of Practice and Education support within our mandala. It will likely further raise the importance of Acharya visits as well.

## **The Recommendations**

Three groups were identified:

1. North American centers and groups,
2. South American and European centers and groups, and
3. Practice centers/retreat centers

It was counterproductive to prioritize the input from three key groups relative to one another, so we've presented it separately.

## **Top priorities for North American centers and groups**

### **Priority #1: Teacher training**

Centers would like more teacher and instruction training across all categories: meditation instruction, Shambhala Training, SSBS and Shambhala Guides. The ratio of new people to experienced teachers/instructors is causing a strain on the capacity of many centers.

*In summary: we recommend that the Office of practice and Study assess and plan teacher training by broad regions, in consultation with centers and groups in those regions.*

#### **Teacher Training Recommendation #1**

- Divide centers and groups into regions.
- Each quarter, the Office of Practice and Study assesses selected regions for training needs, and schedules training well in advance that meet those stated needs.
- We recommend that each region be assessed every two years.

#### **Teacher Training Recommendation #2**

- We recommend that the Office of Practice and Study establish guidelines that allow non-tantrikas to teach SSBS courses under specific circumstances. Though under normal circumstances SSBS is taught by vajrayana students only, the Office of Practice and Study could authorize specific experienced non-vajrayana students to teach in centers and groups where there are not enough vajrayana students available to meet teaching demand.

#### **Teacher Training Recommendation #3**

- We recommend that the Office of Practice and Study establish guidelines for ongoing training and evaluation of individuals previously authorized, to ensure they are up to date and skillful with current curricula and instruction.

All curricula, teachers, guidelines, and authorizations for teacher and M.I. training programs are determined by or in conjunction with the Office of Practice and Study.

### **Priority #2: “Best practices”**

Local leadership would like an effective, organized process for learning about and sharing best practices. This may be the simplest way to increase organizational capability while decreasing demands on volunteer time. Though some information gets exchanged informally through center-talk, because information isn't managed and stored, there is fatigue and uncertainty about what's available.

*In summary: we recommend the development of an effective process to share Best Practices. This would consist of a Best Practice leader, a technical platform, and ongoing monitoring of content.*

### **Best Practices Recommendation #1: Categories**

- We recommend that the Best Practice categories be defined and prioritized by assessing local leadership needs. Categories might include publicity, open house, fundraising, local leadership and governance, finance administration, membership, and so forth. We suggest that focus be placed on areas of strong need identified by centers.

### **Best Practices Recommendation #2: Staffing**

- We recommend there be a Best Practices Chair, who would oversee the development of this core service.
- We recommend there be a volunteer coordinator recruited for each category of Best Practice. Coordinators and contributors alike would most likely come from the local centers, where the need is located. The coordinator, along with the Chair, could monitor the content being posted to be sure there is alignment with Shambhala International policy and practice.
- We recommend that coordinators would work with local leadership and local staff to identify Best Practices and their contributors.

### **Best Practice Recommendation #3: Platform**

- In year 2005, we recommend a series of conference calls be conducted by category. For example, membership coordinators on one call, publicity coordinators on another, and so forth. We recommend that those calls be used to test for interest and content, and as opportunities to form the teams necessary to develop the best practices. There is little risk in this format, and it would allow energy to flow where interest and capability exist.
- We recommend that a platform for storing and sharing information be developed toward the end of 2005. This would likely be a web-based platform. Obviously, staff or funds would have to be identified to build and maintain the platform. Initial thoughts on a Best Practice website are offered in the Core Services Report (page 9).

### **Priority #3: More Acharya visits**

Not surprisingly, centers and groups would like more visits from Acharyas. The reasons why they don't have as many as they would like are varied: the cost of the fee and travel; the staffing required for the programs; lack of clarity about the lead time required and who and how to invite; and lack of ability to "pin down" busy Acharyas to specific dates without a great deal of time and effort.

*In summary, we recommend: increased information sharing about Acharya visits and regional coordination of visits using the same regional breakdown and coordinator as recommended for teacher training.*

### **Acharya Visits Recommendation #1: Policy and guidelines**

- Post general information to the website (and perhaps circulate to center-talk every six months or so) detailing:

- how to invite an Acharya--the process
- special teaching interests, if any, of the individuals
- usual lead-time required
- cost range and how to determine that for specific Acharyas (according to the responses to my posting, people are reluctant to ask Acharyas directly, and some Acharyas are reluctant to bring it up, so there is a lot of confusion in this area).

#### **Acharya Visits Recommendation #2: Communication**

- We recommend that both Acharyas and local center leadership communicate more about where the invitation process is getting challenged and how, from both sides, to address any concerns.

#### **Acharya Visits Recommendation #3: Coordination**

- We recommend thought be given to coordinating Acharya visits regionally. One person in a region could act as a facilitator/initiator for both teacher training (see above) and Acharya visits. That person's role would be to liaise with all the centers in the region on those two topics, and initiate activity as required and requested

#### **Priority #4: Centralized publicity materials**

There seems to be fairly unanimous agreement that this would be a greatly appreciated service-- it is "longed for" by the centers! People would like to see centralized brochures and flyers for areas of common need, such as Shambhala Training, SSBS courses, open house, "who we are", and so forth.

*In summary, we recommend the development and distribution of customizable templates for common programs and needs, as well as logos and images.*

#### **Publicity materials Recommendation #1: Staff**

- We recommend that a core staff of volunteers be formed to gather samples and provide design and wording for centralized publicity materials. We recommend this group consist of people with practice and study experience and technical expertise. We recommend the group be relatively small, consisting of perhaps 5 people who are able to produce materials within a reasonable amount of time.

#### **Publicity materials Recommendation #2: Logos and images**

- We recommend an enhanced library of dharma art, logos and images be collected and made accessible on the web-site.

#### **Publicity materials Recommendation #2: Downloadable Publicity**

- We recommend that this work lead to a growing collection of downloadable and customizable flyers, posters and brochures for the various offerings we have in common.

- There was some debate about whether the wording should be fixed or customizable. In order to get the maximum benefit, we recommend it be customizable so all centers could benefit from the resources even if some changes were needed for local audience, language or custom.

### **Priority #5: Help desk**

Centers would like to have a central point to go with important questions. This need is particularly important while the Shambhala International administration is understaffed.

*In summary, we recommend development of a help-desk function using email and volunteers.*

#### **Help Desk Recommendation #1: Platforms**

- We recommend that an email account be set up for the help desk function and that this email account be posted on the website.
- We recommend consideration be given to parallel telephone Help Desk support.

#### **Help Desk Recommendation #2: Staff**

- We recommend that a small team of volunteers be recruited to staff this function for limited periods of time.
- We recommend that a process be determined for how the volume of communication be divided amongst the Help Desk staff.
- We recommend that the volunteers meet certain criteria, including
  - Patience and resourcefulness
  - Strong communication and interpersonal skills
  - A good grasp of the mandala and our website content so that they can direct people to the right location for information.

#### **Help Desk Recommendation #3: Resources**

- We recommend the website be continually updated so that traffic is routed to current information.
- Develop and update on the web a well organized FAQ section for easier access to commonly sought information.
- We recommend that a list of resource people be developed so that specific questions not covered on the website could be routed to appropriate email addresses.

### **Top priority for South America and Europe: Translation**

For centers in Europe and South America, and even in some areas of North America, this is the top priority service identified. While the driving energy for this probably needs to emerge organically from within the language groups, our feeling is the area needs more attention and funding from Shambhala International than it currently receives. Most

translation emphasis is focused on translating *into* English, rather than translating the core teachings of our Shambhala lineage holders into the languages spoken by members of our world wide organization.

*In summary, we recommend: identify a small group of experienced representatives who will engage this issue on behalf of Shambhala International, who can develop recommendations for increased support and coordination of translation from English to other major sangha languages.*

### **Top priorities for retreat centers and practice centers**

Though we had one conference call and a few individual calls, this area needs more exploration to be brought into focus.

Retreat centers specifically identify a need for more emphasis and discussion by practice and study leader of the powerful role retreat plays in our practice path. They define their role as supporting the environment and practice of retreat, rather than trying to promote the practice mandala-wide.

The conference calls with practice centers took place after the Shambhala Ngondro was introduced, so increased support of Practice and Education came up strongly. They also identified a need to provide practice and study programming that is appealing to a newer and more general audience, and to market that effectively.

### **Concluding Recommendations**

Clearly there is always need for additional support and services, and in an under funded administration the challenge will be to choose amongst them, allocate resources effectively and wisely, and follow up to ensure what is provided is meeting the needs expressed.

- We recommend that to begin only one or two priorities be tackled concurrently, using the ranking provided by the center leadership. After these are functioning and stable, then the next one or two could be joined. We feel that it would be easy to tackle too many things at once, and that a more focused approach would be more likely to succeed.
- We recommend there be a mechanism and group to annually evaluate the allocation of our resources for core services. As circumstances change, the priorities for core services will likely shift as well.

## **Appendix: Core Services Report**

### **Our Assessment Process**

#### **Urban centers and groups, North America**

Eighteen North American center/group directors participated in conference calls which elicited lists of services and support needed by their centers. Following that, twenty-six centers and groups responded to a center-talk request to choose the top five priorities from the compiled list, by priority order for their local center. The choices were then weighted in a points system based on how high the centers ranked them.

#### **South America**

We met in person with a key and experienced member of the South American sangha about the challenges faced in the region, and discussed what assistance could most effectively come from outside to support the South American centers.

#### **Europe**

Chris Tamdjidi recommended 40 people in Europe who could be contacted to give their input on priorities for potential core services. All were contacted with the questions, “What services come from Shambhala Europe that you feel are very critical or helpful?” and “What additional support or services would you like to see come from outside your center, whether from Shambhala International or from Shambhala Europe: If there are things you particularly think should be provided by the International Mandala, please indicate that.” There were quite a few responses; unfortunately, due to time, we are unable to fully reflect those in this report.

#### **Practice and Retreat Centers**

Practice centers and retreat centers were invited to join a conference call; practice centers were also invited to have an individual call. Most centers gave some input.

### **Findings**

It was difficult to contact centers and groups directly based on the public information available. When we emailed groups using contact information on their websites, a surprising percentage of the time the email returned as not deliverable.

A large percentage of contacts did not respond, even if the email seemed to be delivered. One invitation sent directly to 22 centers to participate in a conference call received 3 replies. Posts to center-talk were slightly more effective, particularly for the very first calls. Among the center administrators who are part of the subgroup, this lack of response was seen as a reflection of the many simultaneous demands on center leadership.

We observed that as time went on, fewer and fewer centers participated in the calls. Even though the topics were those identified as most important to the most centers, a few of the later calls had only subgroup members present.

Not surprisingly, it seemed even more difficult to make contact with South American and European centers, for a variety of perceived reasons. One is language, another is the communication mediums—while in North America we have gotten somewhat used to using conference calls to share information, it is often prohibitively expensive for South Americans and Europeans to join those calls.

There are also such different key needs in Europe and South America that entirely different conversations are required. For example, in South America the two main issues (translation and subsidizing teacher/student travel and exchange) don't even make the top-ten list of needs for North America. In Europe, many services are provided by Shambhala Europe that are not provided in North America, so there is another set of needs and priorities reflected in feedback from Europe.

Central figures in both Europe and South America helped us connect with people and issues in those areas, but the subgroup is still left with a feeling that the process was “North American-centric” despite intentionally reaching out across borders.

### **High-level design thoughts for a Best Practice website**

(For context, see page 4 of the Mandala Governance and Structure Working Group, Core Services Recommendations, the section entitled Best Practice Recommendation #3: Platform)

- A visitor to the website chooses their category of interest (publicity, open house nights, local leadership and governance, finance administration, membership, and so forth).
- Within the chosen category, there are at least two sections: one section would contain information on best practices; a second would allow for questions and dialogue. For example, in the Open House Night category, someone might post the query, "How do other centers staff their open house nights? What happens after instruction/sitting?" People with responsibility for specific areas within their centers would have a ready-made place to find information and connect with their peers at other centers on the topics that are of most interest and concern to them, rather than all administrators having to wade through all topics on center-talk.