

2004 Shambhala Community Plan Summary of Working Group Proposals

*Full proposals can be found at the Congress web site, at
<http://www.shambhala.org/congress/>*

Mandala Structure and Governance – 4 proposals

Tenets of Governance

The Governance Workgroup felt that identifying and articulating significant tenets (or principles) was the ground for developing a renewed vision of governance. The proposed tenets are:

- Shambhala society is a mandala continually evolving around the core principle of basic goodness and the path of individual and social enlightenment.
- The overall role of governance and the work done by individual office holders is inextricably linked to the essence of the Shambhala and Buddhist teachings. This reflects the union of the secular and the sacred.
- We share the deeply challenging responsibility to ourselves and the future Shambhala society to preserve our profound legacy while empowering the living mandala to articulate a contemporary vision and contemporary manifestation.
- In the Shambhala mandala, the continuity of Kagyu, Nyingma and Shambhala teachings is protected and transmitted through the primacy of lineage.
- Shambhala society is governed as a monarchy with the Sakyong as King.
- As Monarch, the Sakyong has governing authority, where he chooses to use it, in all matters spiritual and secular.
- The Court is the seat of Shambhala Government and Culture
- The cultivation of basic goodness and warriorship in society leads to the growth of open exchange in society – at all levels.
- Shambhala monarchy is rooted in genuine representative bodies that broaden and give real meaning to participation in the governance processes of the mandala.
- Shambhala governance connects Court and Society, manifests the dharma, administers the overall container for the teaching of the dharma, and provides mandala-wide services.
- Decisions should be reached through an appropriate balance of hierarchy and participative consultation.

Core Services

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. 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

Charter Model

The Shambhala mandala has over the years become a significantly larger and more complex international organization with operations in many national and local legal jurisdictions. A growing number of Shambhala Centers are locally incorporating in order to facilitate purchase of property, form governing Boards with local perspective and commitment, and limit inter-organizational liability. These are viewed as rational and beneficial developments which reflect the geographical expansion and organizational maturity of our mandala.

In response to this increased complexity, it has become important to redefine our shared understanding of the operating agreements within our organization. We have termed this new understanding the Shambhala Charter Model. The model envisions a new corporate structure that maintains a “pervasive and harmonious whole” while at the same time being flexible enough to encourage and accommodate the local autonomy of our Shambhala Centers and constituents.

In brief, according to this model, in order to be organizations within the Shambhala Mandala, Shambhala Centers, groups and affiliates would sign a new Charter agreement specifying their rights and responsibilities.

Congress

The Congress takes place annually within the wider framework of the governance mandala. The purpose of the Congress is to provide an opportunity for all of the elements of the mandala to communicate together at one time. This provides a unique opportunity for dialogue, deliberation and engagement on issues that are important to the overall health of the Shambhala Mandala.

Recommendations cover the following topics:

- Role of the Congress
- Cycle of the Congress
- Themes of the Congress
- Selection of Delegates
- Host Site
- Financial Considerations

Membership Policy

What's New?

- A recommended mandala-wide definition of membership: *A member is one who makes a connection to mindfulness-awareness practice, and/or contemplative practices based on mindfulness-awareness, and is interested in deepening his or her experience by integrating this into daily life. Based on this connection, members are empowered to serve the community by supporting its activities financially and by taking on appropriate responsibilities.*
- Financial requirement: *All members are required to give regular financial support to their local Center or Group.*
- A unified approach for every Center to know exactly how many members they have
- A new International membership category for persons not affiliated with a Center
- Centralized support for local membership coordinators
- Membership in a Center automatically confers membership in the mandala-at-large
- Membership as an open and public community event
- Emphasis on magnetizing members rather than making membership mandatory

What's the Same?

- The cornerstones of membership: strengthening the Shambhala community through practice, financial giving, and service to the Center.
- Local determination of dues structures and membership categories
- Local determination regarding volunteer service to the Center by members

New Economic Model – 3 proposals

Funding Model

This is a recommendation for a new approach to funding the core services provided by Shambhala to its centers, groups and members.

Key features are:

- Continued annual fundraising by the center of the mandala
- Revenue transfers from Shambhala centers and practice centers. Guidelines for 2005:
 - For local centers in North America: 4 to 6% of gross unrestricted revenue
Note: This transfer is in addition to whatever is transferred for Shambhala Training, and the gross unrestricted revenue does *not* include Shambhala Training revenue. At some point we would like to consolidate so that there is only one transfer based on the combined revenue.
 - For North American practice centers: 2% of gross unrestricted revenue
 - For Europe: 2% of gross unrestricted revenue
- An annual budgeting cycle that would balance plans for core services with plans for revenue transfers

Hire a Chief Financial Officer for Shambhala

Given the many pressing financial and strategic concerns facing the Shambhala Mandala, we recommend creating a CFO position and hiring for this position as soon as possible. To this end we have drafted a job description for consideration by the President and the Mandala Governing Council (MGC). It is not presumed that a qualified candidate can necessarily be found within the Shambhala community. Therefore, this recommendation contemplates posting the job in and outside of community-only venues.

Financial Reporting

- Shambhala, working with our external accountants, compile the specific list of center and affiliate financial reporting required on an annual basis.
- Additional information of administrative interest would be requested on an annual basis from affiliates.
- Each entity of the mandala provides the required annual reporting information no later than March 31 of the subsequent year.
- Shambhala provide to the reporting centers its electronic templates and questionnaires for capturing all required annual reporting information; no later than January 15 of each year.
- This process begins for the 2004 financial year, with the templates available by January 15, 2005.
- Each entity provide, as soon as possible after year-end, a simple summary of the financial results of its year, with appropriate commentary, to the local membership and other parties as required.
- Additional issues be brought forward to the governance group that will have ongoing responsibility for financial management oversight.

Diversity and Accessibility

These recommendations for improving diversity and accessibility in Shambhala are comprehensive and multifaceted, reflecting the varied diversity issues and needs of diverse members of our Mandala. They are presented as a basis for further discussion and action. In this regard, some recommendations may not be relevant or appropriate for all areas of the mandala.

More than 70 recommendations are offered covering the following main topics:

- Provide Leadership
- Develop a Diversity Plan
- Make Facilities Accessible
- Promote Language Diversity
- Create Multicultural Interior Environments
- Diversify Shambhala's Public Image
- Make Programs Affordable
- Diversify Governing Boards
- Integrate Diversity into Programs
- Provide Diversity Training

- Engage in Diversity Practice
- Promote Intellectual and Political Diversity
- Establish Programs for Families and Children

Leadership Development & Succession Planning

The following outlines the material that the working group will present to the Shambhala community at the Shambhala Congress, 2005.

- Developing Future Leaders: Resources, Examples, Discussion Questions
 - *Volunteer Management and Mentorship*
 - *Court Principle and Leadership Development*
- Leadership Training: A Resource List
- Community Participation/ Consultation: Discussion Questions
- Job Descriptions/ Succession Practices: Examples/samples, Clarification Around Policy

Outreach

The Outreach Working Group would like to offer three final products at the Shambhala Congress, as follows:

Outreach Toolkit

Manual and CD with advertising templates and recommended follow-up procedures for gateway programs, specifically *Turning the Mind into an Ally*.

Outreach Bulletin

Newspaper-style handout of "best practices" related to innovative programs and community events that are already taking place around the mandala.

Website Facelift

New design for the homepage of the Shambhala International website so it is more inviting, dynamic, and user-friendly for newcomers.

Community Care

The Community Care Working Group has focused on how our community might better care for its members, how we might establish a “culture of caring” within our sangha.

In a document titled “*Caring Community in Action*” (<http://www.shambhala.org/congress/care/commcare20040708.html>), we first identify some of the positive characteristics of a caring person. This is followed by a description of how caring people might manifest in our community. These characteristics are offered as a starting point.

The community care working group recommends that Center leadership identify at least one point person to raise awareness of community caring issues and to use local post-Congress planning meetings to identify priorities for how Community Care can be improved in one or two ways. The “*Caring Community in Action*” document and the Community Care resource list will be useful in this process.