

Leadership Development and Succession Planning

Deliverables Report

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

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We propose that centers receive the material in hard copy at the Shambhala Congress. Contact names and information will be provided as additional resources on each topic (the organization of contact people has not yet been completed).

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Membership

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I. Developing Future Leaders

In a survey of Shambhala center directors and meditation group coordinators, more than half of the respondents indicated a **difficulty in filling leadership positions** (particularly with skilled candidates), and several mentioned a lack of willingness or commitment among members to take leadership roles.

i: *Volunteer Management and Mentorship*

We asked the young adults of Shambhala (at the Vajra Dawn leadership conference) to tell us what they experience and observe as potential **obstacles to getting involved** in their local centers, and to taking on leadership roles. We believe their experience applies not just to young adults but to students of all ages. Following is a partial list of what they said:

(please note: this list is intended to be helpful – not to be taken as complaint)

- Not being invited
- Lack of training (may contribute to lack of confidence/ enjoyment)
- Lack, or perceived lack, of skills needed
- Not enough support
- Or - too much ‘hand-holding’
- Not being interested
- Not knowing how to get involved/ where to begin/ who to talk to
- Poverty atmosphere (at center) around volunteering
- Not having time (may be tied to money- needing to be paid for work/time)
- Feeling unappreciated (in some circumstances tied to not being paid for work)
- Not enjoying the work
- Lack of confidence

The importance of good **volunteer management** was discussed at the conference. Many of the obstacles to getting involved in one’s center could be addressed by having a person in the center responsible for overall volunteer management- overseeing and taking care of volunteers; learning about people’s interests and skills; bringer together newer and older students in volunteer situations to make volunteering more of a learning experience; developing a culture around volunteering that is less about begging for help and more about developing people as leaders and providing people with opportunities to practice.

Mentorship is also key to leadership development, and should be viewed as an important, necessary responsibility of our leaders. Through mentorship, a leader begins to share his or her leadership with those who come after. Leaders identify potential leaders and begin to cultivate them to gradually to take on more responsibility for our communities. When one becomes a Center Director, it is often too late to begin studying resources, going to workshops, attending Center Directors Councils, etc., to gain the skills and vision necessary for Center leadership. And without having formalized mentor relationships, emerging leaders may not be motivated to study materials and develop leadership capacity. Thus, the establishment of mentorship systems within Centers can be seen as the context within which our leadership training, development, and succession take place.

The Vajra Dawn working group on leadership development, led by Tom Z. Ni and in conjunction with this working group, will present a report to the Shambhala community at the Shambhala Congress. The report will consist of suggestions to Shambhala centers regarding volunteer management, mentorship relationships, and overall support of developing leaders. Although prepared by Vajra Dawn, the scope of the report is students of all ages.

As well, ‘best practices’ from centers that have established, effective mentorship programs and volunteer management will be shared with the community.

ii *Court Principle and Leadership Development*

One way to address leadership development and volunteerism in our centers is to focus on manifesting **Court Principle**.

Court principle can be drawn upon to help create enjoyable practice and learning environments for volunteers who come to Shambhala centers to do everything from washing dishes to financial accounting. Developing leadership through the principles of ‘court’ in younger and newer members is an important responsibility of Shambhala centers.

As well, the teachings on court principle can be drawn upon in the support of those currently in leadership positions.

We will be providing center leadership with the following:

- Information on existing resource material concerning court principle as it relates to Shambhala centers (with some attention to the work that Eva Wong has been doing in Shambhala centers and practice centers).
- Discussion questions and suggestions about how, practically speaking, court principle can be drawn on in the development of younger/newer leaders and volunteers, and how it can be helpful in supporting center leadership.

II. **Leadership Training**

The Vajra Dawn working group on leadership development identified the lack, and perceived lack, of skills and training to be one of the obstacles faced by newer and younger members to getting involved in their centers.

As well, fewer than one quarter of center directors and group leaders who responded to our survey indicated that center and group leaders receive adequate training for their roles.

At the Shambhala Congress 2005, we will present to Shambhala centers, practice centers, and meditation groups information that we have compiled* on:

- Resources for management in the not for profit sector
- Resources for management in spiritual and religious organizations
- Shambhala leadership programs and resources

*Please see [Appendix 1](#) for a rough draft document outlining these resources.

Although our sangha has several stated requirements for our teachers and meditation instructors, and has put a great deal of effort into training programs to fulfill these requirements, we have no comparable requirements for our administrative leadership and provide little in the way of direct support and training for them. The working group suggests that further work be done to develop policy and support measures around center leadership in the next two years of restructuring.

III. Community Participation/ Consultation

As part of the review of the International Mandala, the role of the Director of a Centre is changing. One key aspect is that Directors are now being asked to consult members on proposals coming out of the work of the Shambhala Congress and Governing Council. Concerted effort is being made to open up genuine communication between community leaders and the diverse citizens of Shambhala.

There are some key questions to ask ourselves as we facilitate this shift:

- What is the role/purpose of a regular community meeting in a centre?
- To what extent are meetings genuinely consultative and/or informative? To what extent are they part of an international decision making structure?
- What is the balance between democracy and leadership?
- What role can community participation/ consultation play in developing future leaders?
- What is the role of the local community in choosing a center director?

Over two thirds of the Shambhala centers and groups who responded to our survey report holding community meetings, and nearly all of them report using email to communicate with members.

Working group member John Seex is writing a discussion paper concerning the practice of community meetings in Shambhala. The discussion paper will be posted on the

Congress website in December in an effort to further the mandala-wide dialogue on the subject of community participation and consultation.

IV. Job Descriptions and Succession Practices

Approximately two thirds of the centers and groups who responded to our survey reported having no functioning job descriptions for volunteer or paid positions.

Center leaders with whom we have spoken indicate that having job descriptions would be quite useful to them, but that they have not had the chance to develop job descriptions with their councils, or they have run into difficulties.

Helping centers and groups to **clarify the authority and responsibility of their leaders** by developing job descriptions is an important and necessary step for both leadership development and succession planning in our community. There are two ways that we can help with this process:

- by providing examples from those centers which do have functioning job descriptions.
- by providing clarity around the responsibilities and expectations of center directors in relation to mandala governance.

We hope to be able to provide answers to the following questions:

1. What are the specific job requirements of center directors vis a vis mandala governance and the proposed interim governance structure of Shambhala?
2. Are directors or coordinators 'representatives' of their local sanghas, or of their local 'city or region' to the Mandala council, to the court, or to...?
3. Are directors or coordinators 'representatives of the Sakyong' (as it says in the Shambhala Europe document outlining the director role), or of the President, or of the Mandala council to their 'city or region'?
4. Do appointments of directors need to be approved by a central body? If so, what is the process?
5. Are there any official requirements for the recruitment or selection of center directors or group coordinators?
6. Is it up to individual centers to decide on the practice level requirements for their center directors, or is there a general policy for this?

It is also important that clear information be provided to centers on the authority of leadership groups and individuals in the mandala who may affect local center governance, such as: the **Mandala Council**; the Council of Warriors; the Dorje Kasung and local Kasung leadership; Shambhala Training Resident Directors; and **Acharyas**.

Recruitment and Selection

The authority and responsibilities of Shambhala center directors in relation to the proposed mandala governance structure has implications for the selection and recruitment of center directors. If center directors are being asked to act as representatives of their communities to the larger mandala, then local communities need to consider the skills and selection processes which should go along with this. Local sanghas need to work with questions such as: What is the role of the community in choosing the director of the Shambhala center? What forms of training should be required, or provided, for the role?

