



Strategic Plan

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Table of Contents

Strategic Plan Overview..... 1

Chapter 1: Our Mission and Vision 2

Chapter 2: Rigor in Practice 4

Chapter 3: Caring for the Sangha Treasure..... 12

Chapter 4: Children, Families, Young Adults 15

Chapter 5: Prison Program..... 20

Chapter 6: Cohort Groups 24

Chapter 7: Affiliated Groups 29

Chapter 8: Communications..... 33

Chapter 9: Leadership..... 37

Chapter 10: Succession 41

Chapter 11: Staffing..... 44

Chapter 12: Finances 50

Chapter 13: Facilities 55

Appendix A: Plan Monitoring and Evaluation..... 59

Appendix B: Communication of Plan 60

Appendix C: Strategic Planning Process..... 61

Appendix D: Temple Tradition and Culture..... 63

Strategic Plan Overview

Dharma Rain Zen Center is a Soto Zen temple for lay practice that was founded in 1972 and given its current name in 1987. It is dedicated to helping people cultivate and realize Zen Buddhism in everyday American lives. DRZC is what it is today in a large part because our founding abbots, Kyogen and Gyokuko Carlson, had a vision to establish a place of practice for lay people that would be accessible, while offering depth of practice to those who wanted it. Gyokuko was also determined to involve families and children as an important part of the sangha, because in many places children were seen primarily as an obstacle to serious Zen practice.

Other aspects of DRZC are the result of careful choices: its central, urban location; open-handed offering of the Dharma without an inner circle of those who are “really” practicing and an outer circle of those who are not; and offering most Dharmic events for free or at relatively low cost.

Our first strategic plan was developed in 1997-1998. It included five focal areas: membership, delegation, transition planning, succession, and facilities and management. Dharma Rain has met or exceeded the goals set in that first plan, especially in increasing membership, expanding our facilities, delegating operational responsibilities, improving communication within the sangha, and developing our children’s programs. The success of our first plan demonstrated that strategic planning works by focusing our intention and by providing a consistent touchstone for making organizational decisions.

Our sangha intentionally and successfully transitioned from a pastor-centered community with 50-150 active members, to a program-centered community with 150-225 members. In November 2011, we initiated a new strategic plan to guide our growth. In 2014 we began a process to move our temple complex to a new location, allowing for more space and programming. As this has occurred, our financial, physical, administrative, and spiritual resources have continued to be stretched in multiple directions. The current plan is an effort to clarify and direct our collective intention regarding our future growth and development.

In our current organizational documents, the Board of Directors and the Dharma Council are charged with strategic planning. This plan is the product of a Strategic Planning Committee comprised of our abbots, and representatives from the Board, Dharma Council, and Dharma Garden Council. This plan is intended to function as an organizational road map for the next 5-10 years.

The Board, Dharma Council, and Dharma Garden Council have evaluated the recommendations in this strategic plan and determined which we will pursue. A process for monitoring our progress and amending the plan is detailed in the Appendices.

The Strategic Planning Committee would like to express its deep gratitude to all who participated in the strategic planning process and helped to create this document. It is our hope that this plan is a meaningful, living document as Dharma Rain continues to fulfill its mission as a sanctuary of Buddha, Dharma and Sangha in such a way as to cultivate compassion, love, wisdom and understanding.

Chapter 1: Our Mission and Vision

I. Overview

This chapter describes the mission and vision of Dharma Rain Zen Center. Strategic recommendations in subsequent chapters of this plan were drafted with the intention that they support and align with our mission and vision.

II. Mission (Why We Exist)

To transmit the teachings and practice of Soto Zen Buddhism by cultivating compassion, love and wisdom.

III. Vision (How We Carry Out Our Mission)

We are a Soto Zen Buddhist Sangha sharing the practices of zazen meditation, mindfulness, reflection and ethical living. We seek to relieve suffering by the skillful use of Buddhist teachings and the generous acceptance of all beings. We honor the ancestors and traditions of the past while we adapt to the needs of current practitioners and future generations. Our shared intention is to cultivate authenticity and integrity in our own lives and in the larger community in which we live. Our hope is to engage in wise and compassionate activity for the benefit of all beings.

IV. Equity Statement

Dharma Rain acknowledges that suffering is a human condition made worse by bias and prejudice toward people based on race, ethnicity, income, gender, gender identity, sexual orientation, disability, and other traditionally marginalized identities.

We acknowledge the individual and collective impact of privilege, bias, and prejudice in our own sangha, and within American Zen. We commit to address our structural inequities as an institution.

We welcome and affirm all who come here to seek the Way and celebrate our differences while harmonizing the one and the many.

V. Values

Transformation and community: We acknowledge the importance of both depth and breadth in our practice lives and recognize that over one's life different lessons and sources of nourishment are needed from the temple and sangha. We emphasize the central place of zazen, the transformative power of student-teacher relationships, and periods of intensive practice. We also emphasize the importance of connection with sangha, with maintaining the precepts, and with bringing practice into our relationships outside of the sangha.

Thorough commitment: Practice needs to be integrated throughout our lives. We operate the institution in an ethically sound, socially mature, environmentally sustainable, ecologically

sensitive, and fiscally responsible manner. We strive to model the Dharma in how the organization operates and communicates.

Accessibility and inclusion: We strive to make the Dharma available via many pathways and to a diverse spectrum of people, guided by the understanding of the importance of Way-seeking mind. We have made an explicit commitment to equity and openness and attempt to minimize obstacles that people encounter in their search for the Dharma.

Honor lay and monastic paths: We value the interdependence of lay and monastic approaches. We appreciate a container that celebrates the creativity and authenticity of lay practice as well as the rigor of formal monastic practice. Each approach is valid and can lead to the same liberation, and each approach benefits from engagement with the other.

VI. Current State

The mission statement was recently changed from a longer version that read like a list. The current vision statement was developed by the Temple Officers in 2016 and is much shorter and simpler than the version shown in the 2011 Strategic Plan. The equity statement is a stronger and more contemporary version of the former statement of inclusivity.

Another document that is relevant for this chapter is *Our Lineage Tradition and Temple Culture*, a primer on temple culture prepared by the Elders' Council, first in 2010 and then revised in 2018. This document describes what makes Dharma Rain recognizable as Dharma Rain, distinct from other Soto Zen temples, and can be found in Appendix D. A *Values* section has also been added to this chapter of the strategic plan, which is a slightly condensed and reformatted version of what was given as the *Vision* in the 2011 strategic plan.

Chapter 2: Rigor in Practice

I. Overview

The first sentence of the Dharma Rain Zen Center Bylaws states that our Primary Purpose is “To transmit the teachings and practice of Soto Zen Buddhism by cultivating compassion, love and wisdom.” It is also important to note that the Bylaws state that “We value the interdependence of lay and monastic approaches and appreciate a container that makes the rigor of monastic forms accessible to lay practitioners. Each approach is valid and can lead to the same liberation, and each approach benefits from engagement with the other.”

Above all, we invite and support people to discover their own edge of practice. All of our programs, facilities, events and activities support these specific intentions, either directly or indirectly.

This focal point develops opportunities to deepen practice, for those looking for “the next step” in developing their practice, for those needing various degrees of structure, inspiration, or guidance because of spiritual or life transitions, and for those seeking intensive formal training. Maintaining rigor as a priority for the temple helps keep our practice authentic, vital, and true to our lineage and traditions.

Rigor in Practice addresses Zen Buddhist training for our sangha. Leadership, instructorship, and the abbacy succession process are addressed elsewhere in this Strategic Plan.

II. Current State

Dharma Rain has done well at making practice broadly available for lay, 21st century American lifestyles by providing an array of dharma gates. We have shown a strong commitment to cultivating a family-friendly environment, to inclusion, equity and openness, to modeling practice integrated with all aspects of life, and to supporting a wide variety of programs (e.g., seminary, residency, classes, retreats, term student programs, discussion groups, Dharma Garden, prison programs, outreach speakers, the Daoren Circle, regular Disciple meetings, associated & affiliated groups, and introductory workshops).

We also honor our responsibility to provide opportunities to intensify or deepen practice. The opening of insight arises out of the focusing and stilling of the mind. Likewise, the temple’s educational, social, and organizational functions rely on the clarity which arises from this profound inquiry. Taking the steps necessary to maintain and nurture formal aspects of practice keeps Dharma Rain relevant to the sangha of practitioners, and to the broader community in which we find ourselves. We function as an inspiration, example, and reminder of the significance and potency of contemplative practice for the community of the ten quarters. Showing that this depth is accessible to all, regardless of physical and mental capabilities, is the foundation that supports our commitment to openness and accessibility.

We have created a multi-layered container with different practice styles in different contexts. We continue to diversify dharma offerings and pathways. We attempt to address current

limitations by adding practice venues with varying degrees of form, clarifying the differences between different containers, and adjusting the calendar.

A. Goals Completed From 2011 Strategic Plan

Sesshin & Zazenkai Goals: The number of week-long (five days or longer) sesshin have been increased to five per year, with consideration of an additional closed sesshin with no part-time attendance allowed. If we include our participation in the Cultivating the Way annual sesshin at our affiliated Empty Field Zendo, we have reached our 2011 goal of six sesshin per year including four traditional week-long sesshin and two shorter multi-day sesshin.

We also hold several shorter retreats, including approximately nine full-day zazenkais each year plus four half-day zazenkais.

Schedule & Calendar Goals: The liturgical calendar has been significantly adjusted to satisfy the goals of the 2011 Strategic Plan. All goals have been met, with the exception that we don't always have a spring term student program.

Formal Container Goals: The goal of making the mature practice held by long-term members more visible has been largely met. It is not clear that we could do much more than we're already doing towards fulfilling this goal. Visibility of residential practice and emphasis on formal practice during Ango both contribute to a greater fluency with and respect for the forms within the sangha at large.

Apprenticeship opportunities are plentiful at Dharma Rain. There is a mentoring process by team leaders in place for most positions and jobs.

The Mandala Model provides the practical structure for identifying, recruiting, and developing members' skills in keeping the temple running. The Mandala Council has a large role in this. It approaches potential new volunteers with care, with the understanding that an 'ask' can be significant for people. More often than not, people are approached without a specific job in mind -- just letting them know that there are ways to get involved.

B. Other Changes Completed Since 2011 Strategic Plan

Leadership Development: Responsibilities for recognizing the readiness of members to move into leadership positions have been moved from the appointed Leadership Development Team to the group of Dharma Rain active transmitted teachers (DRATT). The Mandala Council also has a role in this for non-teaching positions.

There is a deliberate process in which the readiness of members to move into leadership positions is considered by DRATT. This process is based on relationship, observation, and consultation among the teachers in DRATT, as seems appropriate. The details of decisions about individuals' readiness are confidential, and each person's practice is considered unique.

Seminary Program: The Seminary Program went through a major revision in content, structure, and cost in 2018. The program changed from a single track of 5 required and 5 elective core classes offered on an irregular schedule to two parts: 1) 5 required core class series offered on a regular schedule and at a significantly lower cost; and 2) 4 required classes focused on expression of dharma for speakers, instructors, and team leaders. The intent of these changes

was to make the Seminary Program more accessible to members in terms of scheduling, cost, and flexibility for individual goals.

C. Benefits of Current State

Dharma Rain is nationally recognized as a leader in developing lay and family practice. We offer a wide variety of events, and many of our events are well attended. Most members feel we hold the Zendo forms fairly lightly and are tolerant of mistakes in form; the openness and accessibility that the community finds here because of that is valued highly. It is quite easy for someone to get started practicing with us, as there are many different ways to get involved, and we don't have many requirements for participation.

We have also managed to nurture a stream of deep practice within this container. This is exemplified by:

- Multiple sesshins, zazenkais, and advanced classes as noted above.
- Frequent opportunities for formal and informal sanzen.
- In the course of learning a temple job from a senior, an apprentice not only contributes to the temple's function, but also cultivates the mind and heart of practice in the context of an otherwise "mundane" task.
- The Daoren circle, in which a small group of lay practitioners shares the intimacy of vow, service, and mutual support, now in its eleventh year.
- Dharma Garden and other children's programs, providing practice for both the children and the teachers.
- The Prison Program, stretching our Sangha and practice to include incarcerated persons who wish to do Buddhist practice.
- The Seven-Up Group, an opportunity for those with seven or more years of practice to share in and lead focused Dharma discussions.
- The Term Student Program, in which both newer and more experienced members develop sangha connections and learn to express the Dharma in a personal way.
- The Seminary Program, a curriculum designed to provide a broad background in Soto Zen teachings, and to prepare students to lead classes. Students must demonstrate their grasp of the material in writing and speaking in order to graduate.
- Monastic practice, a training program for ordination-track practitioners who live at the temple, participate in the schedule full-time, train under the direct guidance of a teacher, and serve the broader sangha in many ways.
- Transmitted Lay Teachers, senior practitioners whose depth of practice is formally recognized, who are entrusted with representing our lineage within the sangha, and who are highly visible exemplars.
- Residency, an opportunity for extended full-time immersion in the monastic calendar.

D. Limitations of Current State

Limitations in the following areas have been identified for this focal point.

Intensity: Rigor in practice is not measurable or quantifiable. Each practitioner must find their own edge of practice, and Dharma Rain is committed to assisting them in that if assistance is sought. Though we have worked towards providing a broad offering of practice opportunities, it appears that some people are under-served. Sangha feedback on this focal point indicates that elder, differently-abled, racially diverse, financially challenged, and other such groups may have trouble finding suitable and sustainable practice opportunities at Dharma Rain.

Residential Training: The residential container hasn't reliably provided the accountability and challenge necessary to support members' practice during vulnerable times. With the transition to the new Siskiyou campus, the container has been a bit too loose at times -- at least partially because of facility limitations during construction. Residential training requires continuous fine-tuning between accountability and personal path.

Schedule: The yearly and monthly calendar is complex and confusing to new members and isn't always set far enough in advance for members to plan around. We have such a large variety of events that our institutional resources have become strained. Events sometimes displace regular practice, thus sacrificing continuity. The daily residential schedule is geared to meet the needs of members who are looking to participate in the temple's monastic practice form. But participation in the residential program has generally been low in both number of residents and intensity of participation.

Container and Form: The trade-off of our relative looseness towards Zendo form is that we miss opportunities to display the sacredness of everyday life. Many members would like more awareness of and skill with the Zendo and kitchen forms in particular, but do not take advantage of the traditional ways of learning them – consistent, regular formal practice. We also would like to emphasize work practice as taking the mind of meditation into activity, rather than just accomplishing goals.

At the other end of the form spectrum, what form we do follow likely intimidates to the point of exclusion some of the people who might otherwise be helped by Buddhist practice.

The capacity of volunteer jobs as a vehicle for spiritual training is currently underutilized.

Mature Lay practice opportunities: Senior non-residential practitioners want more support and opportunity for developing their practice within their lives. Some years into practice, what else is there to do? How do we develop our practice in secular environments? We need to further develop service positions and temple responsibilities as an integral part of practice. This is also addressed in the Succession and Leadership focal point.

Practice Opportunities for elder, differently-abled, and other members who cannot sustain the more physically rigorous forms of practice: These people often reduce, or give up entirely, their formal participation at DRZC because of perceived or actual difficulty in practicing with rigorous Zen forms. We should continue to develop practice opportunities or allow adjustments to our normal form that allow sufficiently relaxed form and zendo behavior so that they can continue formal practice without feeling that they're less than good Zen practitioners.

III. Potential Future States

Option 1—Move towards a more monastic, cloistered training environment.

This option creates a significantly more structured residential container that supports the rest of the temple.

Pros: Makes it very easy to introduce changes that would increase rigor. It could provide a lot of rigor to those who can most easily access it and could give the sangha as a whole a potent and easily recognizable practice environment.

Cons: This option would be at odds with DRZC's stated primary purpose "to promote lay practice first" and would further marginalize already underserved groups. It also may involve a significant shift in flavor. One risk is developing a sense of inner and outer groups. This option may sacrifice the accessibility that members value highly.

Option 2—Relax form and modify or expand offerings to embrace practitioners of all capabilities and limitations -- 'Zen Lite'.

This option would further relax or do away with some of the forms that may intimidate underserved groups. Everything we do would be up for evaluation as to its effect on diversity, equity, and inclusivity. Forms that might go could include robes, dharma names, length of zazen periods, and so forth.

Pros: This might be inviting to some underserved groups.

Cons: Dharma Rain risks losing members who are most active and committed to formal practice. Support for their transformation might be compromised.

Option 3—Blend to suit.

For the most part, we are already moving in this direction. But in this option we would make a conscious decision to do two specific things to increase inclusivity. First, we would continue to improve the accessibility of sesshins and other rigorous practice events to under-served groups. Second, we would create new practice events specifically oriented to those under-served groups.

We would make an effort to be meticulous about honoring all practice paths and not setting up implicit standards of better or worse practice.

Pros: Serves members at all points of the practice spectrum.

Cons: May be more complex and difficult to administer. This option could be confusing for new or occasional participants. Like other areas for development, it also would be limited by facilities and staff/volunteer resources.

IV. Sangha Input/Feedback/Concerns on this Focal Point

We hosted three meetings during August 2018, to get feedback from the Sangha on aspects of Rigor in Practice as well as other Strategic Plan chapters. Two of these meetings were open to the entire Sangha, and one to the disciples. A total of about 45 members participated.

Common themes in the feedback for this focal point were:

- Most expressed that they appreciate Dharma Rain's broad range of practice opportunities.
- Most said they are satisfied with the current range of opportunities, though the balance between more and less rigorous offerings may benefit from some adjustment.
- Almost all rejected the number of sesshins, sanzens, and zazenkais attended as valid measures of their intensity of practice. Many voiced that their practice feels intense but is not necessarily focused within the Dharma Rain container of offerings.
- Many expressed concern that older, sick, and dying members are not currently adequately served with practice opportunities.
- Most expressed that they value our traditional Zen forms.
- Many voiced concern that younger practitioners cannot afford the time or money to attend sesshins and other time/money intensive offerings.

Note that it is likely that at least some who show up at Dharma Rain have voted with their feet. They do not show up for much of what the Temple offers. This leaves those who do show up for more rigorous form as the loudest and strongest voices on this topic.

V. Recommendations

Option 3—Blend to Suit offers the most benefit to Dharma Rain's membership. We recommend the following.

A. Sesshin and Zazenkai

Mostly achieved: Have most sesshin allow flexible attendance or participation, but also have at least one that is closed once it begins or is open only to more advanced practitioners. Hold a zazenkai, half-day zazenkai, or similar event at least 11 months of the year.

In addition, we recommend:

- Experiment with and introduce more 'rigor-lite' practice offerings such as 2-3 day open retreats, an optional later entry into zazenkais (e.g. entry at 5am and 9am), more frequent 1/2 day zazenkais, and dedicated elder (et al) sesshins or similar 'sustainable' events.
- Prepare and announce adaptations for elder, differently-abled, and others at sesshin and zazenkais. Announced available adaptations might include any or all of reclining stations, slower ringing of bells, encouragement to adjust posture as needed, and so forth.
- Explore other ways in which we might make our dharma and practice more available and inviting for racially diverse and other groups that are underserved at Dharma Rain.

B. Schedule and Calendar

Continue efforts to simplify the yearly calendar to more closely accord with the training cycle, to fit better with the school year, and to keep fall term as a unit:

- Re-introduce the spring term student program. Make this an annual program.
- Keep the event calendar on the website up-to-date twelve months into the future, at least for major events such as retreats, classes, and Dharma Garden.
- Clarify which group is responsible for which dharma-related tasks. Establish guidelines for what we offer. This is, at the time of this Strategic Plan Update, under consideration by the ORATS (Overlapping Responsibilities Among the Teaching Side) working group. (ORATS is composed of the Abbot, 2 lay teachers, and a senior member with organizational skills. Its mandate is defining primary and secondary responsibilities for the various Dharma-related tasks among the multiple councils and other bodies of the West Hall and also includes determining communication paths among these bodies.)

C. Formal Container

We recommend that the Mandala Council, perhaps in consultation with the Dharma Council, review the orientation, mentorship, and oversight of team leads and trainees to emphasize the Dharma of each temple job. This might include:

- Working with team leaders to ensure that mentorship emphasizes work practice as Dharma rather than just the technical aspects of doing a job right.
- Emphasizing that leadership is valued equally in both non-teaching and teaching roles.
- Adding a small amount of ceremony to the beginning and end of every work period. This could be as simple as the Hymn to Daikoku or Great Vow's work period chant at the beginning of a work period and a Dedication of Merit at the end.

D. Support Lay Practice Away from the Temple

Sangha feedback on this chapter indicated that many center their practice in their home, family, and work life. It is important that Dharma Rain leadership actively acknowledges, respects, and supports this. This point recommends experimenting with ways in which we might do that:

- Make an effort to reference the value of home practice in dharma talks, classes, workshops, and other events. Emphasize in classes and dharma talks how what is being taught can be applied to daily lay life.
- Establish new cohort groups or study groups focused around aspects of lay practice such as workplace koans, practicing in relationships with non-practicing partners, supporting aging parents, and so forth.
- Incorporate an awareness and honoring of the nuances of lay life in sanzen.

- Increase the visibility of Dharma Garden programs and the prison program to the adult sangha. This would involve us all in the diversity, practice, and perspectives inherent in our Sangha.

E. Mature Lay Practice

Continuing advanced classes, study groups, and retreats for senior members is one strategy for addressing mature lay practice, as evidenced by the Daoren and 7-Up groups. Modifications to the other areas of concern identified above will also affect this category. This point is also addressed in the Leadership section of the Succession and Leadership chapter of this plan.

Chapter 3: Caring for the Sangha Treasure

I. Overview

Our members and participants are the heart of Dharma Rain Zen Center. How well we meet the needs of the sangha is a reflection of the health and vitality of the temple itself. Previous versions of the Strategic Plan outlined how we take care of our facilities, finances, and programs. This Strategic Plan deliberately includes several chapters that describe how we care for our people.

People have more diverse ways to be involved at DRZC, and consequently the community can no longer be considered as those who attend the main programs on Wednesdays and Sundays. The DEI report prepared for us states, “A more inclusive view of sangha would be to shift our action, speech, and thought to a sangha comprised of prison inmates, youth, adult members, and non-member attendees.” When we consider caring for our sangha in the various aspects, explicated in this and the following chapters, we want to keep this inclusive lens in mind.

II. Current state

Currently, Dharma Rain Zen Center utilizes a variety of formal and informal methods to meet the spiritual and pastoral care needs of its members. Formal methods offered include classes, liturgy, and the opportunity to meet with dharma teachers. Informal methods include the Sangha Support Network through which Sangha members can ask for help, such as requesting groceries or meals when confined after a surgery; our Guestmaster team, which greets newcomers and answers questions; and a newly formed Sangha Outreach Program to provide visits and practice-support to homebound members who request it.

The temple offers teachings, programs, and opportunities to interact with senior members and teachers. However, it is up to individual sangha members to take the initiative to attend a class or sanzen. Additionally, should a spiritual or pastoral care need arise, it is up to the sangha member to ask for assistance.

While our Guestmaster team welcomes everyone and many classes, services, and Sunday morning sanzen are available to both members and non-members, other aspects of pastoral care, such as the Sangha Support Network and the Sangha Outreach program, are available primarily to members, with some discretion with respect to non-members who may have developed a significant relationship with the sangha.

A. Benefits of Current State

An enthusiastic and dedicated group of volunteers participate in caring for the sangha treasure.

New programs arise from the voiced wishes of sangha members.

Leaving it up to members to speak up for their needs allows each sangha member to discern the degree to which they would like to engage with the sangha/ teachers/ instructors.

B. Limitations of Current State

No deliberate process is in place to assess the needs of the sangha and how well those needs are being met.

Sangha members can feel that no one notices when they are not present.

Sangha members may feel too intimidated to ask for help or speak up about their needs.

III. Potential Future States

Option 1— Continue as we are.

Pros: Pastoral care needs of sangha members will continue to be met as they are requested and as priests/ lay teachers are available to meet those needs.

Cons: Some sangha members may not have their pastoral care needs met due to feeling intimidated or that no one cares.

Option 2— Invest in developing the pastoral care skills of teachers and senior students to help foster a culture in which pastoral care takes place at a sangha level.

By providing opportunities for pastoral care training to teachers and senior students, we can cultivate a broader understanding of how to care for sangha members as the need arises during everyday interactions. Trainings may cover topics such as confidentiality, basic psychology, ethics, our Safe Environment Policy, how to intervene in a mental health crisis, and how to discern when a referral to professional services should be made.

Pros: Will help us develop the resources and skills to care for ourselves as sangha.

Cons: Will require currently scarce resources to train and provide oversight of this broad group of pastoral care givers.

Option 3— Develop a cohort of priests, lay teachers, and senior students trained to proactively offer pastoral care to sangha members both in the temple and out in the community.

A cohort of interested priests, lay teachers, and senior students would be developed who are trained and committed to being ready and available to provide spiritual and pastoral care for members during life transitions. This investment would enable us to more skillfully reach out to sangha members who may be in need but have not made an explicit request for help.

Training would cover many of the topics described in Option 2 above along with communication and assessment skills to enable cohort team members to proactively anticipate and meet the needs of sangha members. Minimum requirements for training would be established and a certain level of commitment expected.

While Option 1 and Option 2 can in many ways benefit both members and non-members, Option 3 is intended to focus primarily on the pastoral care needs of our members, fostering a sense of "cradle to grave" care of our community.

Pros: Will create resources to more proactively provide pastoral care to meet the needs of those who have needs but may have hesitated to request care for those needs or may be unaware of the resources available.

Cons: Will require currently scarce resources to train and provide oversight of this more highly-trained group of pastoral caregivers.

IV. Sangha Input/ Feedback/ Concerns on this Focal Point

During the sangha discussions regarding the strategic plan, several members made comments regarding issues related to pastoral/ spiritual care. Many expressed the importance of being seen, heard, and feeling welcomed, or that they belong, at Dharma Rain. The notes from these three meetings were recorded and used for the creation of this chapter of the strategic plan.

V. Recommendations

Options 2 and 3 are recommended. These options overlap in that much of the training is appropriate for both groups. They are also related in that they both enhance and make more robust the Red energy or “connection” aspect of who we are, expressed through a sense of community and offering of compassion to each other.

Chapter 4: Children, Families, Young Adults

I. Overview

Dharma Rain Zen Center has been actively supporting the family life of lay practitioners for close to 30 years. Through the Dharma Garden programs, we seek to share and embrace spiritual practice by introducing the forms, rituals and practices of the Dharma Rain lineage of Zen Buddhism, while cultivating a supportive, caring and creative environment for parents, guardians and children to explore their own practice as individuals, within families and as integrated members of the wider sangha.

The primary focus of the Dharma Garden programs is to support children and families in their spiritual development, well-being and growth; and to encourage and support young people's inherent Buddha nature.

II. Current State

Dharma Garden Council oversees four programs: Sunday Dharma school, Mandala on the Mountain Dharma camp, Frog Song Preschool, and parent/guardian support and education. We are able to offer scholarships to all our programs.

Sunday Dharma School

Bi-weekly classes for children, preschool through high school, aim to cultivate and nurture the emotional intelligence, social skills and spiritual growth of children through the teachings of our Soto Zen Buddhist lineage. Dharma School serves approximately seventy students from ages 3 to high school graduation in six classes. Teaching Dharma School is considered a practice position. The Dharma Garden Council manages administrative concerns, including development of policy and procedure, curriculum framework and development, enrollment, and teacher recruitment, development and support.

Strengths: Dharma School and camp have been around for close to three decades. We are maintaining continuity in our vision as people in leadership roles change. Ordained and lay Dharma Garden volunteers are stepping into leadership roles previously filled by Gyokuko alone. Examples include the formation of the Dharma Garden Council and Jyoshin taking on ceremonial responsibilities, such as answering shosan questions presented at Dharma School Rohatsu. The program benefits from dedicated volunteers with a deep and sustained passion in sharing the dharma with youth, many of whom return for multiple years of service.

Shin'yu has built a relationship with the youth program director at Clouds in Water Zen Center in St. Paul, MN. DRZC has received curriculum from Clouds in Water, and Clouds in Water sent some children and adults to Dharma Camp in 2018 with the intent of starting their own camp.

Challenges: Recruiting teachers is difficult, particularly teachers with a mature practice and interest in sharing dharma with children. The council lacks support, training, and mentoring plans for teachers. The council does not effectively communicate the practice element of being a Dharma School teacher to the wider sangha and continues to have challenges keeping track of

administrative matters. The mandate calls for curriculum development and for policies and procedures to be developed. This is slow to happen.

Mandala on the Mountain - Dharma Camp

Designed for campers ages 8-18 to create a culture of respect and acceptance and to learn about themselves and the dharma through a combination of traditional summer camp activities and Buddhist practice, including morning zazen and classes. Enrollment is capped at approximately 55 children. Dharma Camp has historically taken place at Camp Adams in Molalla, OR, and is staffed by volunteers, many of whom return for multiple years.

Strengths: Dharma Camp is in its 24th year in 2018 with consistently strong attendance and positive reports about the experience by both volunteer staff and campers. Camp feels like the right size for staff who have been involved for several years - we have not had to exclude people for lack of space. Positive word of mouth from attendees mean camp spaces fill without advertisement.

Challenges: Finding volunteers to staff camp who have the time flexibility, experience with youth and dharma knowledge/experience presents a challenge each year. The functioning of camp relies on the long experience and organizational memory of a few people. Going forward, it will be necessary to document more of that expertise and memory so that camp can function with broader leadership. Notification that Camp Adams will no longer be available adds the challenge of finding a new venue and adapting the camp experience to it.

Parent/Guardian Support and Education

The parents' group meets bi-weekly at the same time as Sunday Dharma School classes. The classes focus on parenting as Buddhist practice, discussion of the Zen rituals and ceremonies that are part of Dharma School and some introduction into formal Zen practice. The program provides the following: designated staff available to answer practice questions; support to sangha parents in cultivating their own practice; and ceremonies parents and wider sangha participate in together. Parent group attendance ranges from 4-15 per class.

Strengths: Parents attend classes on a regular basis. Attendees have expressed appreciation for the following elements of the program: recognition of and support for family life, and parenting in particular, as a demanding form of spiritual practice; dedicated sitting time together; facilitated discussion of their own and children's dharma practice; structured involvement in the Zendo with Ti Sarana, lunch, and family friendly Dharma talks.

Challenges: While all families share their desire for a program to nurture spiritual practice in their children, the adults come from varied levels of experience with Buddhism and disparate interest in practice at Dharma Rain. The current assumption about offerings for parents is they want to become DRZC members or are interested in Zen Buddhism - some parents may not have an interest in Buddhism, or Zen, or Dharma Rain specifically.

Frog Song Preschool

Frog Song Montessori Preschool opened on the Siskiyou campus in 2015 as a non-religious program based on our Buddhist values of compassion, respect, mindfulness and the interconnection of all life, values shared by the Montessori philosophy. The curriculum strongly

emphasizes nature and community and primarily serves neighborhood families. For the 2018-19 school year, Frog Song will employ a lead teacher, a co-teacher and an assistant teacher and will have 15 students. The program runs Monday through Friday, 8:30am to 6:00pm, and approximately follows the Portland Public School calendar. Frog Song staff also offer 5 weeks of nature-themed camps in the summer. The program was certified by the State of Oregon in October 2018, indicating adherence to state regulations governing early childhood education, and indicative of the high quality of the program. Frog Song administration is performed by volunteers.

Strengths: Frog Song is now in its fourth year. Parents are grateful and enthusiastic for the program; we see that children thrive within the program. Parent enthusiasm has caused Frog Song's reputation to grow, eliminating the need for marketing. Frog Song is so well-regarded that parents are enrolling their children on the wait list several years in advance of their attendance. The program generated approximately \$33,000 in net income for Dharma Rain in fiscal year 2017-18.

Challenges: There are waitlists for both camp and preschool each session. If we are to add another classroom, which would be the next step in growth, that would necessitate a director for the Frog Song program who is able to devote sufficient time to that work.

A. Benefits of Current State

The programs have great longevity and popularity. We see this with the waitlist for Frog Song, that camp doesn't need to be advertised, and the 20+ year tenures for Dharma Camp and Dharma School. We find enough volunteers to fill positions for camp and school every year. Many Dharma camp and Dharma school volunteers have long tenures in their roles and find this to be rewarding practice. Several Dharma Camp graduates have come back to camp as counselors as an expression of their gratitude for the role camp played in their younger lives. While it is difficult to quantify, we see the dharma being shared through these programs.

B. Limitations of Current State

Administrative capacity: The Council hears requests for more programs - retreats, overnights, teen-specific programming. The current volunteer and staff labor pool struggles to sustain Dharma Garden at its current size and complexity. The Council is not able to put energy toward teacher training and curriculum/policy development. Parent/guardian enthusiasm is great but their involvement in program support is minimal.

Family support: As the programs have grown, we have attracted more families that do not have prior experience of Dharma Rain, and in some cases, no previous relationship with Zen practices and teaching. We have more need than ever to provide support for the parents to help them find an appropriate understanding of the culture, teachings, and practices of Dharma Rain without assuming or expecting families to practice primarily at DRZC.

Lack of a young adult program: The previous strategic plan included development of programming specific to 19-29 year olds. Currently, we don't have young adult programming, nor are we developing such programming at this time.

Concentration of expertise: These programs are run by a small number of people who hold experience and operational knowledge primarily within their memories. It would be beneficial to document, where possible, this operational knowledge for ease in sharing with more people and training new volunteers.

III. Potential Future States

Policies/procedures: The Council feels a need for greater documentation and clarification of policies and procedures, such as registration, attendance taking, record keeping of fees charged and enrolled Dharma School students year over year, tuition increases, emergency contact management, teacher/camp counselor selection, development, support and expectations, permission slips, and Dharma School class composition. It is also important to clarify costs incurred by and income generated from Dharma School, Dharma Camp, and Frog Song as individual programs. This information will aid the council in decision making, and also would be helpful for overall DRZC budgeting and considerations of expansion.

Dharma Garden support of Frog Song: Increase Dharma Garden Council's overall knowledge of Frog Song program goings-on and explore ways in which Dharma Garden Council can offer support to the Frog Song program. Frog Song is operationally somewhat complex and would benefit from additional support, but it is unclear in the current state how and whether Dharma Garden Council would be able to provide operational support.

Program development and expansion: The council has heard sangha members express interest in a variety of additional programming such as a young adult program, offering Our Whole Lives curriculum, childcare, and additional programming for parents and guardians. It would be good to explore feasibility of each of these programs as well as whether we have the resources to provide such offerings.

Diversity, equity, inclusion: Per the 2018 Diversity, Equity, and Inclusion study, Dharma Garden families are more diverse than the adult sangha. It is our intent to ensure we follow best practices for teaching students of diverse backgrounds. We need to examine curriculum, support for volunteers, and policy and procedure through the lens of diversity, equity, and inclusion.

Forms and curriculum: We have been using five dharmic themes for many years at Dharma School. However, we currently lack lesson plans and teacher support for these themes. We also have written seijos (ceremony descriptions) for ceremonies, but do not have plans or curriculum that work with ceremonies in the classroom. It would be helpful to develop curriculum for the parent/guardian group as well.

Training and Sangha Engagement: We intend to develop a way to increase parent involvement and leadership in Dharma Garden programs. To further the support of the spiritual development of the parents, we could explore the possibility of retreats for families and/or parents.

Selection, training, expectations for Dharma School teachers and camp counselors: We would like to have more counselors and teachers with a mature practice and grounding in Dharma Rain culture. We also would like to make our teachers more visible to the wider sangha and

develop better mentorship practices for teachers and counselors. These are serious practice positions that are not visible to those not engaged in Dharma Garden.

IV. Recommendations

Our proposed future state combines multiple areas of focus. In order to stabilize our current program for further development, we suggest focusing on:

- Development and documentation of policies/procedures
- Curriculum development/teacher support
- Increase visibility of the Dharma Garden program and teaching roles to the sangha.
Greater recognition of teaching as practice position makes it easier to recruit teachers.

Once policies/procedures are documented and we have a greater pool of volunteers to draw from, we can catch our breath and research viability of new programs and possible increased Frog Song support from the council. Growth in one direction or another would be determined by the outcome of the council's research into programs at this time.

If/as space becomes available, the Frog Song program would expand to include an infant and toddler classroom, then a second primary classroom for ages 3-5.

Chapter 5: Prison Program

I. Overview

DRZC has had a prison program since 1997, when Getsushin Brox began to work with two men on Death Row at Oregon State Penitentiary (OSP). The program has expanded as chaplains and/or inmates have requested further Buddhist teaching, and now encompasses six ODOC (Oregon Department of Corrections) prisons and the Maclaren OYA (Oregon Youth Authority) Youth Correctional Facility. Volunteers operate under the direction and supervision of the Oregon DOC or OYA, but DRZC has responsibility for selecting and maintaining oversight of volunteers. Potential volunteers are screened by one or both co-coordinators of the program, and then have to go through a lengthy process of a background check, visiting, training, orientation, and fingerprinting/photo documentation with DOC before becoming carded. DRZC training has been minimal and largely informal, though documentation is in place to provide guidelines, a mission statement, and program philosophy. (See [Prison Program](#) on the Dharma Rain website). During the past several years, a transition program has begun through Home for Good in Oregon (HGO).

In the 2011 Strategic Plan, the Prison Program was counted as six of eleven Related Groups then existing, with one paragraph describing how it operated. A few years later, it became clear that this was not accurate, that the prison sanghas operate as a program of DRZC, with the Prison Transition Group that meets at DRZC as an associated cohort group. As we explore ways to develop a more inclusive view of sangha as part of our DEI work, we are considering how to integrate prison groups more deeply into the sangha itself.

II. Current State

The Prison Program experiences slow growth measured both by volunteers and number of adults in custody (AICs) served. The total number of AICs served weekly is estimated at 50-70. The number of volunteers has grown to eleven carded volunteers and five interns working toward becoming carded.

Each institution has a lead volunteer, who coordinates meetings and other volunteers. Groups meet weekly or 2-3 times per month. Meetings include meditation, service, and dharma discussion. Some groups have annual retreats; DRZC leads a day-long retreat every other month at OSP. Some teachers/leaders offer sanzen. More than 100 AICs have received Jukai (Precepts) since the program began.

Two mentors have been certified by Home for Good in Oregon (HGO), the state-sponsored, faith-based transition from prison program. A monthly prison support group provides support both to prison grads and to those working to support them, though few grads continue to practice with regular DRZC programs after release. The Safe Environment Committee has produced a Safe Environment Policy document that, among other things, outlines a process for Registered Sex Offenders (RSOs) to attend DRZC. The process involves the Abbot, the Board, and the Safe Environment Committee. Once they begin coming, they must be escorted while they are on campus. One person has gone through the process to qualify for attendance.

Monthly support group meetings of the Prison Transition Group offer a place for prison grads, current volunteers, and family members of AICs to meet together for problem-solving, mutual support, and ongoing training. HGO-certified mentors can meet with prison grads both before and after release from prison to provide continuity in spiritual support and guidance, at their request.

A. Benefits of Current State

- We see real transformation and growth in AICs who participate in the program. They are right up against their karma and hungry for the dharma. At the same time, volunteers experience satisfaction in providing a safe space for meditation, learning, and growth. The AICs express their gratitude repeatedly.
- Slow steady growth of the program has allowed co-coordinators and volunteers to adapt to changing circumstances and meet new realities as they come up. Transition from the program founder to successors is proceeding smoothly.
- The program is stable, with well-established groups that function independently.
- There is little impact on DRZC's budget. Primary expenses are mileage and maintenance of the temple-owned car (and a few volunteers who put in for personal car mileage), and some books. Volunteers donate their time and often their cars for transportation.
- The program is well-thought-of by DOC supervisors (chaplains), and relationships between DRZC volunteers and chaplains are positive.
- Transition support is being provided to grads, with increasing understanding of how to do this most helpfully. It's usual to meet with grads, give text and phone support, and also to encourage them to attend the monthly support group to engage with other grads and also to continue relationships with volunteers.

B. Limitations of Current State

- Little or no consideration has been given to continued growth of the program and what that might mean in terms of supervision, oversight, and training.
- Though many volunteers are involved, the program needs more to provide better coverage and more diversity in service, as well as to ensure continuity. The two eastern Oregon institutions have only one volunteer, with no assistants or apparent successors. The Maclaren program has been on-again, off-again due to availability of volunteers, and is currently on hold for lack of a leader. Some programs meet every other week because of a lack of volunteers, when the demand is there for weekly (or even more frequent) sessions.
- Little or no documentation of actual lesson plans, services, and meditation training is in place, and sharing of resources among volunteers is limited.
- Few solid records of who has received Jukai (when and from whom) exist, and little or no follow-up takes place on outcomes. An advantage to this is that there is a lot of freedom to follow what seems relevant.

- The work we can do in the prisons is constrained by DOC rules.
- Transition out of prison continues to be a challenge – hard to define goals and how to define success. Few prison grads actually participate in DRZC regular programs on any ongoing basis after release. We are still learning how to most usefully work with RSOs.
- The connection between the prison program and the DRZC general sangha is tenuous. The program gets occasional mentions, but people are often surprised that we are doing this.

III. Potential Future States

Option 1—Continue present course.

Pros:

- Easiest option. Things are working, don't mess with success.
- What we're doing allows for slow, steady growth, room to expand as needed and organically.

Cons:

- Gap between DRZC general sangha and prison sangha may continue to widen, to the detriment of both.
- Continued growth is likely to outpace the current administrative structure, with a resulting inability to supervise and oversee the program responsibly.
- Without more new volunteers, programs at some institutions may have to end for lack of volunteers to lead them.

Option 2—Recruit more volunteers.

Pros:

- Would provide increased flexibility and diversity and allow for easier succession as current volunteers age.
- Could make weekly programs possible for those now meeting every other week.
- More HGO volunteers would allow for more work with grads after prison, spreading the work load around and taking it from a personal relationship to relationship with the sangha.

Cons:

- Would add to the task of tracking and supervising volunteers.
- Would require more consistent training (See Option 3)
- The number of volunteers we can get from the Sangha who meet the requirements and can dedicate the time to the program may be limited.

Option 3—Implement annual training of volunteers.

Pros:

- Would allow for more consistent service and improve cohesion.
- Would provide mutual support for volunteers.

Cons:

- Getting volunteers together for an annual training is challenging.

Option 4—Add a web-based resource and record center for volunteers.

Pros:

- Would provide a central place to find resources and ideas for volunteers, perhaps even an online forum for questions and exploration of topics of interest.
- Would give us more solid data for things like Jukai and what programs work well or not.

Cons:

- Would be more work for coordinators. Alternatively, hiring someone to set up and/or keep these records would cost money.
- Might take away from direct services to AICs and grads themselves.

Option 5—Explore mentorship programs within the prison during regular visiting hours. Check with chaplain(s) to see how other religious groups do this. Recruit people to visit on some regular basis (monthly, perhaps).

Pros:

- Would allow for greater contact with the DRZC sangha, to allow people to get to know each other.
- Would enhance continuity upon release with the greater sangha, not just HGO volunteers.

Cons:

- Might be difficult to recruit people for this.

IV. Sangha Input / Feedback

Input from one prison sangha (Coffee Creek Medium) suggested looking at in-prison mentorship programs as practiced by other religious services organizations. They also suggested having occasional articles and stories written by AICs themselves that we could publish on our blog.

V. Recommendations for Future Direction

Option 1 –Stay the course is a given. **Options 2-5** should all be explored and implemented incrementally as feasible.

Chapter 6: Cohort Groups

I. Overview

As DRZC has grown, cohort groups, in which members share a certain interest or flavor of practice, have formed within the temple. These groups provide important needs for the sangha, including:

- Access to the intimacy and friendliness that comes from meeting in smaller groups
- Special group needs such as meetings closer to home, peer support, or topics and practices targeted to the group
- Opportunities for service and leadership for the senior sangha members who help lead the groups

Cohort groups have developed naturally as sangha members stepped forward to start them. Cohort groups function as offerings of Dharma Rain, as differentiated from Affiliated groups, which are separate and have various levels of independence from Dharma Rain.

II. Current State

A. The Groups

Cohort groups arise out of circles of common interest with ongoing group activity and have, at minimum, a coordinator and a teacher liaison. Study groups may be considered cohort groups if they are ongoing.

Within the temple, many different cohort groups have formed and meet at various times and for various purposes. Some cohort groups have become part of regular programming, and some groups have been short-lived as interest has waned; some cohorts operate on campus and some cohorts have members from Dharma Rain and affiliated groups. Disciples and Daoren are examples of cohorts with members from both Dharma Rain and affiliated groups.

B. The Relationship of the Groups to the DRZC Organizational Structure

In the past, it's mostly the case that coordinators made all, or almost all, the decisions about how cohort groups have been run. The Dharma Council has made efforts to monitor cohort groups since its creation in 2008.

Currently, the policy "Guidelines for Cohort Groups" states:

Any Sangha member may propose the formation of a group. A proposal form should clarify what the group needs from DRZC (i.e., space to meet, publicity, etc.), its mission statement, what guidelines it will follow, any special considerations, and who the Teacher Liaison for the group will be. The Dharma Council will review each proposal to ensure it will meet basic standards and address any liability concerns.

Cohort groups will not present themselves as speaking or acting for DRZC under any circumstances. All members of the group will sign on to the [Ethics Statement](#). Guidelines for Right Speech should be agreed upon by the group.

C. Benefits of Current State

As stated above, these groups serve important needs for the Dharma and Sangha.

These groups form in response to needs and are organized and/or led by individuals who are personally inspired in their efforts. They meet important needs while drawing, in a large part, from a different pool of volunteers and resources than are utilized in supporting our main temple programs and activities. At same time, the groups depend on DRZC in many ways, primarily as a place of sangha support and deep practice for the group leaders, so it is a mutually supportive relationship.

The self-sufficiency of the groups minimizes the time and effort they require from the temple staff, officers and councils. Their relative independence allows for a greater diversity in tone, style and teaching methods than is usually found within the core temple programs, which can provide points of entry and/or practice niches for a wide variety of people.

For the most part, cohort groups seem to be forming and functioning effectively and harmoniously. Because they take place at the temple, it is fairly easy to monitor their tone and content, and it is clearer that they would fall under DRZC's liability insurance.

D. Limitations of Current State

Cohort groups arise organically, depending on who perceives a need or has a wish. Sangha members may not be aware they can propose a cohort be formed.

III. Potential Future States

Option 1—No planned changes, allow organic growth.

Pros:

- Continues to allow groups to 1) provide access to the intimacy and friendliness that comes from meeting in smaller groups; 2) meet special group needs such as meetings closer to home, peer support, or topics and practices targeted to the group; 3) provide opportunities for service and leadership for the senior sangha members who help lead the groups.
- Avoids the extra work, meeting time, etc., that would be involved in providing a greater degree of organization with respect to cohort groups.
- Allows groups to arise and grow naturally, in response to need and conditions.
- When community members ask to begin a group and have a coordinator from the ranks of the willing, the groups have a better chance of maturing and lasting.

Cons:

- We already have numerous groups that would appreciate more acknowledgment, support or guidance.

- Even when the founders of a group move on and can no longer provide coordination and leadership for their group, the group often has developed a life of its own and wishes to continue; without some strategic thinking DRZC may overstress its volunteers in trying to serve these needs, or the groups may suffer from lack of leadership.
- We run the risk of teachings that may be inconsistent with Dharma Rain standards.
- Energy in this area may remain untapped if the groups are not more clearly identified as an important part of DRZC's mission. This includes rich opportunities to support any effort at Diversity, Equity, and Inclusion.

Option 2—Identify cohort groups as an important part of DRZC's mission, and encourage, guide and support their formation and existence while recognizing the rich opportunity for cohort groups to be a critical element of Diversity, Equity, and Inclusion efforts.

Pros:

- Continues to provide the opportunities for leadership, interconnection, and intimacy that the current state provides.
- Likely to gradually increase the number of groups and the vitality of those groups.
- Cohort groups expand the number of people DRZC can serve; there will be people in the smaller groups who would not otherwise participate at the temple.
- Cohort groups expand the number of people who support DRZC; people in the smaller groups support DRZC as a base from which their groups draw sustenance (leaders, coordinators, teaching materials, place for retreat, etc.)
- The intimacy and friendliness of cohort groups create a gateway for folks who may be intimidated by formal practice forms or put off by the more limited opportunities for interconnection characteristic of formal practice. Thus, cohorts may be more appealing to people who need time and opportunities for relationship-building to develop trust in an institution. Consequently, cohort groups can be a crucial element in Diversity, Equity, and Inclusion efforts.
- When interest in a cohort group appears to be fading, actions informed by DEI could change the outcome, such as shifting the focus of the group to be more inclusive and aware of DEI, or encouraging leadership of a new group which will support DEI efforts.

Cons:

- Decreased sense of overall sangha unity and intimacy resulting from growth of the sangha and people participating in smaller separate groups rather than as one large group.
- Requires more time and attention, and perhaps material support, from DRZC
- Moving too fast on introducing a new group or program, leaving it unsupported if not enough time and attention is available for it.

- If a group is started because many believe it is a good idea, but without enough members to sustain it, it has a greater chance of fizzling.
- The more complex an offering, the more core support it needs. Conversely, a simple group requires only minimal support by a coordinator and a liaison.

IV. Sangha Input/Feedback/Concerns on this Focal Point

Attendees and sangha feedback sessions indicated a wish that the community of Dharma Rain consider itself one sangha. Our community is often spoken of now as separate yet connected sanghas: the adult sangha, the Dharma Garden sangha, and the Prison Group sangha. Cohort groups provide the opportunity to blur those lines and integrate the sangha into more of a whole with more opportunities for members to intermingle.

Attendees also expressed a wish for recognition of the many forms of practice being expressed as valid. Cohort groups provide more opportunities to recognize the validity of spiritual practice in various forms. These wishes also support integration of DEI practices.

V. Recommendations

Attention to and support of cohort groups are a way to support DRZC's mission while increasing the base of support for DRZC. In all dealings with cohort groups, it is recommended that DRZC exercise the minimum amount of control necessary to ensure basic standards are met and liability concerns addressed. Some of the greatest strengths of these groups are their relative independence, diversity and self-sufficiency, so care should be taken to preserve that.

Option 1— Allow organic growth.

Allow groups to form and dissipate as interest in them arises and falls. Driven by the interests of members and the interests of leaders, this stays the course.

Option 2—Identify cohort groups as an important part of DRZC's mission and an important tool in DEI efforts.

Cohort groups have received plenty of moral support and encouragement, so this shift is a subtle one. It is recommended to continue the evolution toward viewing the groups as integral to DRZC's mission. It is more a matter of changing our temple culture than it is about changing the temple structure or function. Some concrete recommendations are:

- Update the Teaching Roles document to include Cohort leaders or coordinators and tweak language for current usage.
- Ask DRZC teachers with disciples to *recommend coordination of a cohort group to appropriate students* as a valuable practice opportunity.
- *Raise the profile of existing groups* on the website and add a brief description about how the groups are related to DRZC. Long-term more complex cohort groups are listed on the website as programming, a language shift in use that encourages interest in "what" (cohort groups) rather than "when" (schedule). A list of smaller cohort groups needs a place on the website, or to be included in the programming page.

- *Commit more resources to material support of groups.* For reasons stated earlier, these groups tend to benefit DRZC and its core programs directly and indirectly. Ask the Board to consider what level of support might be offered to cohort groups if they are viewed as investments. Suggestions include a discount or no cost (if needed) for a certain number of meditation cushions (to remain property of DRZC); a web page hosted on DRZC's site; reasonable supply of incense and candles; limited printing and copying.
- *Consciously consider DEI when forming and supporting cohort groups.* The recommendations described in the previous three bullets can serve to support the Diversity, Equity and Inclusion effort of Dharma Rain. In addition, bringing a conscious effort to consider DEI when forming, supporting, and marketing cohort groups will help give focus and strength to the DEI effort.

Chapter 7: Affiliated Groups

I. Overview

Affiliated groups range from small sitting groups led by sangha members to independent Zen Centers led by transmitted teachers. Each shares a deep connection to our common Dharma Cloud lineage tradition characterized by an emphasis on shikantaza, sangha, sesshin, study, and recognition of the equally valid but different paths of lay and monastic training.

Terminology used in this document

“*Affiliated groups*” includes all Zen Centers and sitting groups in the Dharma Cloud lineage. “Affiliated” is the term that seems most commonly used by other American Zen Centers. Merriam-Webster lists synonyms of “affiliated” as “akin, allied, kindred, or related.”

There are currently two main categories of *affiliated groups*, although some groups may be in transition between categories.

- “*Sister Sanghas*” are Zen Centers that are part of the Dharma Cloud lineage but are independent of DRZC, with their own dedicated teachers and property, nonprofit status, and ethics and mission statements.
- “*Sitting groups*” are part of DRZC’s Mandala Model organizational structure and are overseen by the Dharma Council. They operate more or less as “branch offices” of the main temple and are led by DRZC teachers, monastics or senior students.

(The terms above are used for clarity in this document because definitions used in the past no longer apply. It is our recommendation to review and update this provisional terminology as appropriate.)

II. Current State

At the present time, affiliated groups appear to be thriving. Several have been in existence for a long time, one for more than twenty years, while others were established more recently. Currently there are eight affiliated groups whose geographic coverage extends from the Coast Range to the Willamette Valley through the Mt Hood Corridor and the Columbia River Gorge to Eastern Oregon and to Portland’s Eastside, as well as to a senior living community in Portland.

Each affiliated group is somewhat different, and they are evolving over time to meet the needs of their members.

Affiliated groups are generally more or less self-sufficient. They are listed in DRZC’s literature and website. Some material support is occasionally provided to sitting groups upon request, such as visits by teachers, meditation supplies, and transportation of DRZC staff to the groups.

A. Benefits of Current State

Affiliated groups serve an important purpose in that they support Zen practice in communities beyond DRZC’s central campus. They are formed when teachers and/or seniors are inspired to start them in response to local needs. As affiliated groups evolve to meet conditions, they are

developing a rich diversity in tone, style and teaching methods. They increase the regional visibility of Buddhism and Zen and as a result, more people are aware of DRZC and its affiliates.

Affiliated groups provide their teachers and senior members with opportunities for service and leadership. They provide teaching, opportunity for practice, intimacy, friendliness, and peer support for those living far away from DRZC's main temple and serve as places of practice for DRZC members at large.

Sitting groups support DRZC as a/the base from which they draw guidance and sustenance (teachers and other leaders, teaching materials, a place for retreat, etc.). It is a mutually supportive relationship as our sitting groups depend on DRZC as a place of sangha support and deep practice for group leaders and others.

Like cohort groups, for the most part, sitting groups draw from a different pool of resources than those that support DRZC's main programs, and their relative self-sufficiency means they require little time and effort from the temple staff, officers, and councils.

B. Limitations of Current State

The self-sufficiency of the affiliated groups is both a strength and a drawback. Without ongoing, regular communication and connection among them, there are likely missed opportunities for mutual support and development.

As DRZC sitting groups grow and mature, and perhaps proliferate in the future, there is some risk that the content of the activities or teaching may differ significantly from what is offered within the core temple programs, or the tone and style of the group may be out of keeping with DRZC culture and Dharma Cloud lineage tradition. This is not currently an issue but could potentially be one in the future.

There are also potential liability issues for the DRZC Board to consider. DRZC might be sued for something that happens at one of its sitting groups. A breach of ethical guidelines could reflect badly on DRZC's reputation. DRZC has an Affiliation Agreement with one Sister Sangha, Empty Field Zendo, but has not clarified its legal relationship with the sitting groups.

Finally, since each affiliated group is so different, it is difficult to summarize them or address them as one category. This reflects the vibrancy of the process of evolution more than it presents a real problem, except when writing a document such as this to make proposals and future plans.

III. Potential Future States

Option 1—No planned changes, organic growth.

Pros: Maintain current state; allow affiliated groups to arise and grow naturally in response to need and conditions.

Cons: Liability risks that should be managed more systematically. Teachings may be inconsistent with Dharma Cloud lineage tradition. Missed opportunities for mutual support and development among the groups.

Option 2—Seek to be more involved with affiliated groups and take a more proactive approach toward them. Actively encourage development of new sitting groups.

Pros: Increased visibility of how groups are doing, and what they are doing. This knowledge currently exists via group leaders but it is not systematically gathered or readily available. Potential liability risks could become visible earlier. Encourage sharing of best practices and mutual support.

Cons: This option would require staffing and time, and the effort needed may outweigh the benefits to be gained. Care would be needed to avoid the appearance of micromanagement. We can only encourage formation of a group if there are people willing and able to lead it.

Option 3—A combination of A and B. Encourage and support natural growth and adaptations of our lineage in a way that is respectful, mutually beneficial, and commensurate with our ethical guidelines.

Encourage peer communication and support among group leaders. Allow DRZC sitting groups to function freely while continuing to exercise the minimum amount of control necessary to ensure basic standards are met and liability concerns addressed. Review overall status of affiliated groups periodically. Monitor development of new DRZC sitting groups.

Pros: Respect autonomy of affiliated groups. Regular communication channels support the continued health and development of the groups. Better visibility to potential liability risks.

Cons: Encouraging peer communication and support requires time and effort to initiate and corresponding time and effort for group members to participate. New groups can be difficult to monitor as they seem to form organically, rather than via formal proposal.

IV. Sangha Input/Feedback/Concerns on this Focal Point

A draft of this focal point was provided to the Abbots, Dharma Council, the Strategic Plan Committee, and affiliated group leadership. Initial feedback from Sister Sanghas was to emphasize relationship and vision for the future over classification and oversight. An annual “Dharma Cloud” day was suggested for the affiliated group sanghas to get together for practice and camaraderie, and this is being implemented. Further discussion of our lineage has been suggested and is included in the recommendations. Responses were positive after incorporating these changes.

V. Recommendations

Option 3 is recommended.

Option 3—Encourage and support natural growth and adaptations of our lineage in a way that is respectful, mutually beneficial, and commensurate with our ethical guidelines.

Reinstate the position of Affiliated Groups Liaison to facilitate connection, communication, and mutual support as well as assess ongoing needs of the affiliated groups and monitor and mentor development of new DRZC sitting groups.

- Encourage peer support among affiliated groups. The form this takes is to be determined in consultation with group leaders.
- Facilitate clarification of our lineage tradition and how it can be expressed, both dharmically and practically, such as mutual discounts for members; work with affiliated group leaders and DRZC Dharma Council to refine the definitions (affiliated, sister sangha, sitting group) and relationships within the lineage.
- Provide an annual report to the Dharma Council and affiliated groups to provide consistent, structured visibility to relevant activity and needs within the Dharma Cloud lineage.
- Dharma Council and affiliated group leaders to jointly determine what content would be most useful.
- Continue to provide oversight and guidance for formation and coordination of DRZC sitting groups.
- Ensure guidelines for starting a sitting group are up-to-date and available as needed.

The Dharma Council to continue to exercise the minimum amount of control of DRZC sitting groups necessary to ensure basic standards are met and liability concerns addressed. Care should be taken to preserve the relative independence, diversity and self-sufficiency of the groups.

The Board of Directors to determine what, if any, legal and ethical agreements would be beneficial, and at what point in the development of the group they should be put into effect. An agreement will only be constructed as a legal document if it is deemed necessary by the Board and its legal counsel. [*Note:* This item is carried over from the previous strategic plan of 2011.]

Chapter 8: Communications

I. Overview

Virtually all organizations find communication to be a perennial challenge, and Dharma Rain is no exception. The temple is made up of many individuals and cohorts with different levels of involvement, interest in and access to information. The temple has a relatively broad leadership structure, with a variety of different bodies making decisions and needing to communicate them.

The overall strategic goal of our communications is to give those who are interested in the Dharma the support they need (information, encouragement, sense of belonging, context) to engage in practice, and secondarily to give the temple the visibility and reach necessary to thrive.

II. Current State

Dharma Rain is consistent about letting regular participants know about upcoming events. This kind of information is disseminated regularly through the website, a weekly e-bulletin, social media posts, verbal announcements at large events, on-site flyers, and by word of mouth. Frog Song Preschool is also advertised in local social media and with extra signage on our property.

Dharma Rain is much less consistent in its communication outside the existing sangha. Some piecemeal actions have been taken at times, but no consistent procedures are in place to let the broader public know about Dharma Rain events and programs. Some tactics that have proved useful in expanding our reach in the past several years are: targeted Facebook posts, thank you emails to workshop attendees, and collaborative events with other groups. Dharma Rain has not used any print or paid advertising in the last 5-10 years.

The development of the Siskiyou campus and extensive collaborations with other groups have raised the temple's profile both outside and within Buddhist circles. This allows some of our messaging to reach out to a significantly larger audience, through news media or partnerships, but it is usually not tied to individual events or activities. The public perception of Dharma Rain via these avenues is generally quite positive.

Dharma Rain prioritizes transparency and accessibility in its communications about organizational governance and news. The bimonthly *Still Point* newsletter fulfilled some of this function as a print newsletter, but that effort was discontinued quite some time ago. Sangha Forums are held twice a year, which give members a chance to hear about current issues from the DRZC Board and Dharma Council. Meeting summaries for the Board, Dharma Council and Mandala Council are summarized and distributed monthly. Many important and revealing documents are available on the website, such as bylaws, residency guidelines, liturgy, and policies and procedures. As a whole, the temple is semi-successful in keeping interested parties within the sangha informed and engaged. This aspect of communication has not kept pace with the increase in volume and complexity of the information as the temple has grown and matured.

An attempt over the last several years to improve marketing and advertising efforts has resulted in some significant headway but has not proved resilient enough to overcome staffing changes and limitations. These efforts relied on targeted social media postings, on-site signage and personal follow ups, and by making branding more consistent and prominent.

Communication between different cohorts, committees and councils within the broader sangha is another area of interest. There is not a clear and unambiguous understanding of how the lines of communication, responsibility and oversight should work within the temple. Part of this is due to ambiguity associated with dual roles, and not knowing which role is relevant in a given communication: eg., “Am I a team leader for the garden or an assistant tenzo right now?” Another confusion comes from overlapping areas of responsibility.

A. Benefits of Current State

The website is long-running, well-trafficked, easily found, and comprehensive. It is currently undergoing an overhaul to make it easier to use, technologically current, and aesthetically pleasing.

Staff can maintain current communications strategies with a fairly minimal amount of time and effort.

Most members feel like they can find out what they need to know about our events, and their involvement with the temple, fairly easily.

B. Limitations of Current State

Limitations of the current state include:

- Outreach through communication to potential new participants is not as robust as it could be.
- Members who don't understand or haven't adapted expectations around the complexity of the organization can feel overlooked.
- Lack of information may keep people from being more involved or engaged in some aspects of temple affairs.
- There is a sense that only a few people can communicate on behalf of the temple because too much information needs to be interpreted and summarized, or because the platform is too complicated or unwieldy, so it is hard to utilize volunteers.
- Complexity and volume of information may lead to an insider/outsider dynamic that slows sense of belonging.
- Messaging and tone to communications may seem highly varied or random.
- Some people feel there is too much temple communication, some people feel like there is not enough. Many people feel both at the same time, about different aspects of the broader communications topic.

- Communications tend to emphasize what, when and where, but insufficiently describe the broader context - why, how, what then.
- It can be underestimated how often and via how many different channels information must be shared for it to be understood and remembered.
- Appropriate pathways for communication are not always clear within the temple.

III. Potential Future States

Several different possibilities for addressing DRZC's communications needs are described below.

Option 1—Maintain current staffing and focus on existing strategies

Continue current procedures to ensure that there is no decrease in the ability for the temple to communicate in a timely, informative, and connecting manner.

Option 2—Overhaul communications procedures

Recommendations to consider:

- Engage a team of knowledgeable volunteers to do a more thorough assessment of effectiveness, reliability, cost (time and money) of our communications tactics.
- Establish a plan for communicating with the broader sangha that informs and interprets information so that it engages and inspires but doesn't overwhelm with too much volume.
- Establish a plan for communicating within the sangha that defines and clarifies pathways between committees, teams, cohorts, and councils for responsibility, information flow, consultation, and accountability.
- Examine communications through a diversity, equity and inclusion lens to make sure information is accessible and navigable.
- Prioritize some tactics, while trimming things that are ineffective or inefficient. Make more use of procedures that can be semi-automated.
- Adapt procedures to allow more ways for volunteers to contribute to communications efforts.
- Consider designating a point person who becomes a voice of the temple and oversees communications broadly (this could be the Shisui position, and if filled, would be a temple officer, a position on par with Tenzo or Tanto).

Option 3—Re-establish print mailings

This is unlikely due to the amount of time and expense that goes into preparing and mailing print media.

Option 4—Increase budget for communications

Allocating a small budget could have a significant impact on our communication strategies. This could be spent on Facebook pushes for local events, ads on Zen websites, and improving local signage on 82nd Ave. A more ambitious version of this could involve setting aside funds for a fellowship, that is, hiring a professional part-time to maintain and improve our communications systems and efforts for a year or two.

Option 5—Invest in other groups and collaborations

Increase DRZC's exposure by putting more effort into partnering with other groups, whether that is site-focused, educational, interfaith, or Buddhist. This could involve having guest speakers come who bring an audience; interviews with sangha leaders on local podcasts; and expanding collaborations with local schools and environmental groups.

Option 6—Increase utilization of existing opportunities for sangha communication

Several opportunities for improved communication are currently in place on DRZC's regular schedule. Many members may not realize that there is an opportunity for member presented concerns at regular board and Dharma Council meetings. Sangha forums could be made more participatory by providing members with an agenda in advance, thus creating time to reflect on current issues. The newly reimagined Disciple gatherings create an opportunity for increased communication among senior members, as well as a regularly scheduled time for ongoing assessment of the communication successes and inadequacies of the organization. The e-bulletin could also be more connecting by diversifying the tone and interests represented.

IV. Sangha Input/Feedback/Concerns on this Focal Point

Through sangha forums, individual conversations and committee/council discussions, our summary of the prevailing sangha opinions on this topic is as follows: Maintain what we're doing well. Give more opportunity for exchange of views and meaningful dialogue about temple issues.

V. Recommendations

Start with **Option 1—Maintain current staff and focus on existing strategies** and **Option 6—Increase utilization of existing opportunities for sangha communication**. These options require the smallest amount of change.

As feasible, pursue **Option 2—Overhaul Communications Procedures**.

Depending on outcomes from **Option 2**, pursue **Option 4—Increase budget for communications** and **Option 5—Invest in other groups and collaborations** as recommended by that process.

Chapter 9: Leadership

I. Overview

The 2011 Strategic Plan section on Leadership focused heavily on the Mandala Model of organization that was then new. As of 2018 the organizational model is established, and while it still undergoes adjustment, the basic outlines are stable. We have recently identified a problem with overlapping responsibilities and lack of clarity of who makes decisions, especially on the teaching side of the Mandala. A committee is working on sorting this out. For this 2018 strategic plan we decided to look at three aspects of leadership at DRZC: Practice, Corporate/Administrative, and the Broader Community.

II. Current State

In the area of *Practice*, the current state is that we have a wealth of senior practitioners (both Dharma Teachers and senior members) providing leadership in many areas, including teaching classes (both adult programs and Dharma Garden), offering dharma talks and sanzen, leading workshops, serving as guest masters, cooking, gardening/landscaping, and leading other work practice areas. These Teachers provide a diverse spectrum of voices and teaching styles. A recent change has been to identify two groups of Dharma Teachers: (1) all of those transmitted by Kyogen and Gyokuko and their descendants – the Dharma Cloud Lineage, which includes Teachers active in related and affiliated groups – and (2) those transmitted Teachers currently active at Dharma Rain.

We have a good diversity in ages in the membership. We maintain a serious but casual atmosphere (e.g., encouraging questions in both classes and dharma talks), and hold forms somewhat lightly, although we emphasize liturgy and precept practice strongly. We have both a strong residential and monastic component, as well as lay Teachers who have significant roles, both dharmically and institutionally. See *Appendix D: Temple Tradition and Culture* for more information.

Authority is distributed beyond the abbot/s, and is seen to reside in the role, not the person. There is a culture of openness, with Teachers sometimes asking for input from seniors on issues. Our practice with authority is developed and nuanced, recognizing many kinds of seniority. Some examples are years of practice; level of ordination – lay, discipleship, and monastic; degree of personal maturity and dharmic realization; institutional role and informational access; level of entrustment – Shuso and transmission; and intensity of practice as shown by participation in Term Student program, temple jobs and sesshin. Emphasis is placed on bowing, willingness, and maintaining an awareness of our own inherent sovereignty, that is, Teachers respect the sovereignty of students and each person recognizes that they are responsible for their own practice.

The Dharma Council has recently overseen an overhaul of the Seminary Program, which seeks both to provide a shared body of knowledge among sangha members and also to assist in developing leadership skills for those intending to teach classes and provide other forms of

leadership in the Sangha. The Dharma Council decides on who teaches what, with input from the Dharma Rain Active Transmitted Teachers (DRATT).

There is a lack of clarity about where decision-making and oversight lies for dharma-related matters. On the Board/Kanin side, Staff, Team leaders, and the Board of Directors all play a role in making decisions, and clear and established norms are in place for making decisions that allow for transparency, good communication and accountability. On the Dharma/Godo side, there is a wider array of relevant groups and more nebulous and sensitive criteria, so it is more difficult. For instance, the Dharma Council, Elders' Council, Leadership Development Team, Dharma Cloud Teachers, DRATT, Staff, Disciples, and Temple Officers might all have a role in a given decision about a class series. This is further complicated by the fact that the Venn diagram of membership of these different bodies would have a lot of overlap. A committee is working to improve clarity in this area.

In the area of *Corporate/Administrative* leadership, we recognize the need for expertise and skills in running what amounts to a small business, irrespective of Dharma practice, while still recognizing that a religious organization differs in significant ways from a typical small business. (See *Chapter 11: Staffing* for more details). The Board of Directors seeks to include certain skill sets for its members in order to enhance the health of the organization. Historically we've blended spiritual and temporal responsibilities in the abbot role, and that continues to be true, as the co-abbot and kanin roles are both held by the same person at this point. The sometime-tension between these two aspects of the organization (historically referred to as East Hall and West Hall), named Operations and Liturgy/Teaching in the Mandala Model, and personified in the kanin and godo roles is an ongoing dynamic in the organization. For more details, see *Mandala Model of Organization* under Documents on the DRZC website.

Leadership in the *Broader Community* includes the many partnerships we have entered into in the local community. These include Multnomah Biblical Seminary, Ecumenical Ministries of Oregon, the Muslim Educational Trust, Great Vow Zen Monastery, Maitreya College, Ecology in Classrooms and Outdoors, Peace in Schools, Madison High School, Ethiopian and Eritrean Cultural and Resource Center, Portland Community College, Portland State University, Friends of Trees, Blueprint Foundation, NE Food Pantry, and Madison South Neighborhood Association. There is also national influence due to Teachers' involvement and leadership with American Zen Teachers Association, Lay Zen Teachers Association, and Soto Zen Buddhist Association.

A. Benefits of Current State

- A wealth in number of Teachers and senior practitioners who provide diversity in voices and styles of presenting the Dharma.
- Diversity in ages of sangha members.
- Serious and yet light holding of forms, allowing for both rigor and accommodation.
- A culture of openness in which feedback and buy-in from others in the sangha is solicited.

- An increasing recognition of the value of temporal skills sets as being helpful for the health of the organization and integration of these into our practice container. Examples include fundraising, marketing, legal/liability expertise, and strategic planning.
- Many partnerships in the local community as well as the broader community provide benefits for all.

B. Limitations of Current State

- Having so many strong leaders can sometimes be confusing. The openness to having issues discussed and considered by various groups creates overlapping responsibilities and confusion about who makes various decisions.
- Still working out the relationship of administrative and staffing needs with teaching and pastoral needs. Having monks and Teachers so involved in day-to-day temporal responsibilities can sometimes take away time and emphasis from Dharma teaching.
- The Intercouncil Mandala Model Review Committee was set up to facilitate communication and coordination among the councils (especially the Board, Dharma Council, and Mandala Council), as well as to oversee the annual review of the Mandala Model. At this point, other groups are working on improving communication and sorting out organizational overlaps. It's not clear who is responsible for what or how this will shake out organizationally. Confusion about who makes dharmic decisions slows the process and creates more possibility for conflict.
- Some senior members are still uncertain about how they fit into the leadership of DRZC.
- The Diversity, Equity, Inclusion process will likely uncover areas that need improvement.

III. Potential Future States

Option 1—Clarify decision-making about Dharmic affairs.

- Acknowledge and make better use of the role that the Temple Officers have grown into: a rapid response and troubleshooting body that hears input and finds consensus about how to resolve difficulties. Temple Officers' decisions are usually recommendations to the Board, Dharma Council, or staff.
- Acknowledge and make better use of the role that DRATT has moved toward, including regular meetings to discuss issues related to individual practice relationships, role of Teachers, and formal teaching. Part of this comes from distinguishing this group, which has a regular presence at and responsibility for Dharma Rain, from the Dharma Cloud Teachers Sangha, which does not have a specific role in making decisions for Dharma Rain.
- Simplify the organizational chart by moving towards disbanding the Leadership Development Team and considering disbanding the Elders' Council. DRATT would absorb the majority of these functions, except for advising the abbots. That function would be more broadly held by the Disciples group (see below). This would involve a member vote to change bylaws.

- Elevate the role of the Disciples group in temple affairs. This body has gone through a lull, followed by some soul-searching. There has recently arisen some momentum around more structured discussions of aspects of temple affairs. This proposal enriches that momentum, by giving clear pathways for communication between the Disciples and the Temple Officers. The Temple Officers will bring questions and ideas to the Disciples and the Disciples will provide feedback.
- Clarify, compare and contrast, the role of the Dharma Council versus DRATT.
- Communicate these changes clearly, so there is a common understanding among the sangha of these bodies and their roles. Also create processes for fluid communication among the circles, and to and from the broader sangha.
- Update the Mandala Model and the Bylaws as needed to implement these ideas.

Option 2—Explore “Outreach” to the broader community.

- Coordinate efforts of publicity, marketing, membership, in order to get the word out about our programs. Create a task force to evaluate our marketing efforts and develop a plan to implement changes.
- Continue to cultivate the relationship with Heart of Wisdom and Great Vow Zen Monastery.
- Continue and strengthen ongoing participation in various community partnerships.

IV. Recommendations

Both **Option 1—Clarify decision-making about Dharmic affairs** and **Option 2—Explore “Outreach” to the broader community** are recommended.

Chapter 10: Succession

I. Overview

Ten years ago, our founding abbots were hoping to retire as abbots by 2020. Kyogen died in 2014, and Gyokuko has been stepping back in a fairly orderly fashion as outlined by the plan we created and as modified by the Succession Committee that began work after the last Strategic Plan. Gyokuko is on track to retire as abbot in 2019. Kakumyo has been trained and installed as co-abbot and is increasingly taking on full responsibility for temple direction. This process has been successful in being straightforward, transparent, and preserving our sense of continuity, as hoped for in the 2011 strategic plan. Since 2011, the Board has implemented an abbot review process, a job description (available in the *Documents* section on the DRZC website), retirement funds, and a compensation package.

II. Current State

We have a process in place for handling succession under several sets of circumstances. It is a multi-tiered system that incorporates input from the Abbots, Elders' Council, Board of Directors, and the general membership to ratify a decision. The current process for succession is described in the Bylaws (last revised in 2017):

Section 3.4: Succession

Section 3.4.1: Succession by Appointment

The Abbot(s) may appoint a successor, subject to confirmation by a majority of votes cast by the membership.

Section 3.4.2: Maintenance of a Successor List

A dated Successors List signed by the Abbot(s) will be held by the Corporate Secretary. This list, when possible, should have at least three names ranked in order of preference. Whenever the list is amended or updated, the date of the new list will be noted in the Board meeting minutes.

Section 3.4.3: Interim Abbot

In case of the death or incapacity of the Abbot[s] to serve, the Board will contact those named on the Successor List. The candidate with the highest numerical ranking on the list who accepts the position will become interim Abbot, able to act as Abbot until confirmation by a majority of votes cast by the membership. The Board shall arrange for a membership vote to be held within six months of the interim appointment for the acceptance or denial of the interim Abbot.

Section 3.4.4: No Appointment

In the absence of a Successors List, or if no one on the Successors List accepts the position of Abbot, the Board of Directors and officers are fully empowered to conduct the business of the Temple until a replacement is found. The Board shall convene the Council of Elders to assist with finding a replacement. An Abbot must be a fully transmitted priest of the Soto Zen tradition. The Board shall arrange for a membership vote to be held within six months of an appointment for the acceptance or denial of the replacement Abbot. The appointment shall be subject to confirmation by a majority of votes cast by the membership.

A. Benefits of Current State

A clear course of action has been laid out, providing for certain circumstances and giving the current abbot(s) primary responsibility for deciding the next abbot(s).

B. Limitations of Current State

The only clear requirement to become abbot is to be a fully transmitted Soto Zen priest; more specificity at this level would make the decision more obvious. For example, there is a preference for a “home-grown” abbot, that is, someone who trained at DRZC who is familiar with the culture here. But there is no clear understanding of how to ensure that this will be possible.

III. Potential Future States

Option 1—Stay the present course.

No specific changes are made as a result of the strategic planning process. It is left up to the Board and Dharma Council to identify and address the issues raised here over time.

Pros: Simple and doesn't require any extra time or administration.

Cons: Doesn't address the limitations outlined above.

Option 2—Have the Temple Officers look at ways to nurture and grow monks capable of succeeding abbots over time.

Pros: Helps to ensure the continuation of good leadership into the future.

Cons: Recruiting is not the traditional approach to ordination; quite the contrary. The job of teachers has been to put obstacles in the way of those seeking ordination as part of testing and training. Training new monks is challenging and takes a long time. Some question of which governing bodies should take up this challenge. This is being considered by the ORATS (Overlapping Responsibilities Among the Teaching Side) working group.

IV. Sangha Input/Feedback/Concerns on this Focal Point

The 2011 Strategic plan outlined several qualities that nominee/s for the abbacy should have, based on discussions with cohort and focus groups, and within the Strategic Planning Committee. It seems useful to restate those here. We want a nominee who:

- Has fairly united support from the sangha.
- Demonstrates the maturity of practice to inspire.
- Has the organizational acumen and interpersonal sensitivity to lead.
- Displays the practice-realization to teach the sangha.
- Is able to commit to full-time service, due both to the amount of work required and to the importance of an abbot's full-time presence and accessibility to the sangha, and to

commit to long-term (working life) service, as this allows stability and trust to grow over many years and allows an abbot to develop skill in his/her role.

- Is drawn from within the sangha, as this has the greatest likelihood of preserving the continuity of our lineage traditions and temple culture.

V. Recommendations

No real need for new action at this time.

Chapter 11: Staffing

I. Overview

DRZC staff serves over 200 adults and 100 children on site and about 300 adults in prisons. Adult members can participate in zazen and formal practice on site at least 5 days a week, receive spiritual counseling at no cost, join the residential community for activities and meals, attend classes and meditation retreats, enjoy the temple buildings during community practice or private retreats, and take advantage of Zen teaching that is firmly grounded in a lineage tradition. More details about services provided through the prison program can be found in *Chapter 5: Prison Program*.

This chapter addresses strategic planning aspects of providing and supporting staff (paid and volunteer) and fundraising and management of finances to support these services.

II. Current State

The center operates about fifty weeks a year, six days a week. Members can generally reach a staff member in person or by phone at least 40 hours a week, during the temple's Tuesday-Saturday business hours. DRZC has a well-maintained extensive website, a weekly e-bulletin, regular events emails, and a Buddhist library. It also offers numerous programs and events that are tailored to different populations, including children, parents, newcomers, senior students, prison inmates, and the community at large.

DRZC currently serves the community with five full-time ordained (including the two co-abbots), four active lay teachers, 4 hired staff (one full-time bookkeeper, one full time and two ¾-time pre-school teachers), and over 120 lay volunteers, many of whom serve the temple in more than one way.

General staffing. The office is currently staffed by two ordained priests and one hired staff person. The Frog Song Montessori Preschool is currently staffed with three hired teachers, one fulltime and two part time with administration provided by a monastic and a lay disciple (both unpaid).

We continue to rely on ordained trainees and volunteers from the sangha for much of the work that needs to be done. The Mandala Council recently reoriented their focus toward defining tasks as practice opportunities and encourage participation based on each volunteer's personal practice interests. Many volunteers have participated in regular work periods to complete the dormitories.

Lay Teachers. Currently, four lay Teachers have an active role at DRZC, while one lay teacher has recently retired. All four active Teachers have constraints on the time they have available for teaching at Dharma Rain. (Two also have primary teaching roles away from the Siskiyou campus. At least two are over 70.)

Residency program. After moving to a new campus and building a temple and support structures, we have now completed Phase II of our dormitories (duplexes). The new dormitories

make available on-site accommodations for ordained and participants in our residential program.

The dormitories have space for up to 3-4 residents, who pay for room and board. Residents are expected to participate in the schedule, including work periods, as much as feasible although they may also hold jobs or attend school.

We have recently created an Oblate program allowing residents to enter a period of discernment with regard to ordination at Dharma Rain with room and board provided. Oblates participate in the Dharma Rain schedule full time, including work periods.

Paid help. We have hired two preschool teachers and a full-time assistant, enabling the Frog Song program to be expanded to a full day. The bookkeeping position in the office that was vacated earlier this year due to a medical situation has now been filled.

Expanded volunteer model. In May 2017, two Board members attended a volunteer engagement training sponsored by Social Venture Partners in which an “expanded volunteer model” was presented. In this approach, volunteer roles are typically project-based, capacity-building in nature, and require more specialized skills. These roles complement the more traditional volunteer roles filled by the Mandala Council, for which many people are qualified, and which are typically structured around a particular schedule or time slot and are more service, rather than project, oriented.

For example, last year, we took on an Intel Encore Fellow, who used his background in construction management and fine woodworking skills to contribute to a variety of construction projects on our site. More recently, a website developer has been recruited from within the sangha to help us develop a new website, and a professional writer has also been recruited from within the sangha to help us develop content for the website and create an annual report for Dharma Rain.

A. Benefits of Current State

We provide many services and opportunities and support a large, vibrant community with a relatively small, but dedicated, staff.

Dependence on volunteers fosters relationships and participation amongst sangha members and provides valuable practice opportunities.

B. Limitations of Current State

Staff appear to be stretched thin at times. Whatever the goals identified by the Strategic Plan, staffing needs are likely to increase over time.

Limitations Related to Staffing Levels

Reliance on Lay Volunteers. Lay volunteers generally have work and/or family responsibilities that limit the amount of time they can devote to the temple. Not only does this limit the amount of work that can be done by lay volunteers, it also runs the risk of burning out lay practitioners when DRZC becomes yet another source of overwork in their lives. Some lay people also find that devoting hours to temple jobs results in too big a sacrifice of time that could be spent in formal Zen practice.

Some jobs are not suitable for volunteers: jobs that volunteers are not interested in doing (difficult, isolated or boring, etc.); skilled or technical jobs that we have no volunteers qualified to do; jobs that require too much of a time commitment; and jobs that require a long-term commitment (they require a fair amount of training and experience before someone can do them effectively).

Reliance on Ordained (or Full-time Lay Residents) for Staffing. The vow to support sangha is only one of the vows the ordained person takes, and hours spent serving as staff are only one way the ordained person supports sangha, so there will always be competing demands for their time, including meditation retreats, time spent away at other formal practice places, study, participation in temple events, classes and formal practice, and various other things their teacher might instruct them to do. The same thing applies to full-time lay residents but even more so, as they have not made a vow to support sangha.

The number of ordained or full-time lay residents active at the temple may vary over time affecting the stability of staffing. Some people will eventually return to lay life, while others will complete their training and be called elsewhere.

Limited availability of lay Teachers. With a reduced number of lay Teachers, DRZC has been moving increasingly toward a monastically-led lay sangha. This carries a risk that the practice limitations, needs, and aspirations of lay practitioners may not be seen and met as clearly as they would be if more lay teachers were involved, potentially undermining our mission to serve a lay sangha. Limited availability of lay Teachers' time also puts more stress on ordained Teachers to meet the demands of leading classes, supporting events, etc. Given our tradition of transmission, this limitation can only be addressed over time.

No reliable way to balance available resources with new proposed events or programs. We have no formal way of balancing the benefits of new events or programs with the amount of staffing and other resources we have available to support such efforts.

Limitations Related to Compensation for Abbots, Other Ordained, Lay Teachers, Hired Staff

No formal compensation review process. We have no formal process in place for reviewing compensation for the Abbots, other ordained, Lay Teachers, and hired staff, including salaries or stipends, retirement benefits or cost of living raises. At this point, the board simply responds to needs when they become apparent, but do not proactively review compensation regularly (other than health insurance coverage).

A policy providing partial compensation to Lay Teachers was initiated this past year by the Board. This policy is a significant departure from previous practice and should be monitored and reviewed by the Board.

III. Potential Future States

A. Adequate Staffing

Option 1—Continue as we are, relying on whatever ordained are present and on lay volunteers.

Pros: Maintains current staffing level of primarily ordained staff. Continues strong emphasis on volunteers and involvement by sangha members.

Cons: Some overwork and stress on the part of staff members, and some things may be neglected. Potential for this situation to get worse as DRZC grows. Unstable staffing situation because ordained trainees come and go.

Option 2—Develop a stronger residential community.

Pros: Attract practitioners who want to spend significant amounts of time in community and will contribute time and energy to the sangha.

Cons: Requires adequate facilities. Requires significant oversight and leadership from at least one teacher.

Option 3—Make use of paid help as most efficient and appropriate for specific projects or roles. This might mean hiring a contractor or consultant or offering formal employment, either part time or full time.

Pros: A contractor or consultant already has the expertise and experience required to complete a project or fill a skilled role. A paid employee can be trained to do complex tasks with the expectation that they will be around for a while. They can be asked to do tasks that may not be appropriate for a volunteer role.

Cons: Requires funding for an employee's salary or contractor fees and some additional formality and management. If the paid employee is a sangha member, they would have to be able to handle the dual roles of paid staff member and sangha member.

Option 4— Leveraging an Expanded Volunteer Model and making use of interns

Pros: Allows project or roles requiring professional-level skills to be filled by a volunteer or at a lower cost than hiring someone at market rate.

Cons: Requires preparation and management efforts similar to that of hiring a contractor or employee, including writing a detailed job description, recruiting, screening, training, establishing accountability, oversight, etc.

Option 5—Establish a process for reviewing proposed special events to ensure a balance of priorities and resources and provide a means of oversight for facilitating successful events.

Resources include both human (energy, time, skills of staff and volunteers, etc.) and material (space availability, financial costs, etc.) resources. This process could also include a means to provide oversight to make sure all aspects come together to make the event successful.

Pros: Will help us stay aligned with our mission. Will help us more efficiently allocate our resources for the best benefit. Will help decrease risk of staff and volunteers burning out.

Cons: Adds a layer to the process of launching a special event.

B. Compensation for Abbots, Other Ordained, Lay Teachers, and Hired Staff

Option 1—Continue as we are by responding only when needs become apparent.

Pros: No obvious "pros".

Cons: Depends on an abbot or other ordained or a Lay Teacher to bring a need to the attention of the board, which they may be reluctant to do. Allows long-term aspects of compensation (retirement benefits, cost-of-living raises) to potentially be overlooked until too late to be of benefit.

Option 2—Ensure the Board reviews and updates compensation plans for the abbots, other ordained, Lay Teachers, and hired staff annually.

Pros: Makes sure that compensation needs are addressed in a timely manner. Ensures that long-term benefits are put in place early enough to be effective over time.

Cons: No obvious “cons”.

IV. Sangha Input/Feedback/Concerns on this Focal Point

Feedback from the series of sangha meetings held to gather Strategic Plan input indicate that some members perceive staff overload as a significant challenge for DRZC. Comments from sangha members indicated substantial support for finding strategies to minimize staff burnout and manage competing demands.

V. Recommendations

A. Adequate Staffing

The concern about providing adequate staffing continues to be relevant as DRZC grows in size and complexity. Recommendations for adequate staffing include aspects of all the options 1-5.

Option 1—Reliance on ordained and lay volunteers.

Continue to rely on ordained and on lay volunteers, with the Mandala Council encouraging participation in volunteering based on a volunteer’s personal practice interests. At the same time, explore a strategy in which lay sangha members commit to being available at regular times for particular types of work such as office work. We should look for ways to help sangha members see this more employee-like role as a way to cultivate their relationship with the DRZC community while contributing in an interesting, rewarding way.

Option 2—Develop a stronger residential community.

Investigate options for providing flexibility with respect to qualifications and length of residency to optimize participation in the residency program. Make opportunities for residency more visible now that space is available in the duplexes. Explore ways to make the residency program more robust, creating more opportunities for shorter residencies, allowing a wider variety of sangha members to experience residency and to make more use of the living spaces in the temple.

Option 3—Make use of paid help as most efficient and appropriate for specific projects or roles.

The Board should assess needs vs. funds available when developing the annual budget each year as well as monitor needs for paid help on an ongoing basis. When skills are needed, an attempt should be made to meet those needs through volunteer labor before hiring, while recognizing the necessity at times to fill skilled positions by hiring staff or consultants.

Option 4—Leveraging an Expanded Volunteer Model and making use of interns.

Continue identifying roles and projects that could be filled by volunteers with professional-level skills and training. Such volunteers would not typically be recruited by the Mandala Council, but rather, by a Board member, staff, or someone invested in the particular project to be supported. The volunteer could be recruited from within the sangha or through volunteer recruitment websites, networking, or employer-supported volunteer programs for retirees, such as Intel’s Encore Fellowship program. Some enhanced volunteers, such as those in the Encore program, may require a stipend.

Investigate the potential for using interns for some projects. May require a small stipend.

Option 5—Establish a process for reviewing proposed special events to ensure a balance of priorities and resources and provide a means of oversight for facilitating successful events.

(1) Since proposals for special events are typically brought to the attention of the Dharma Council, *responsibility would be invested in the Dharma Council to review and assess proposed special events from the perspectives of (a) how the special event fits into temple priorities, and (b) how the benefits of the event balance with the cost in resources, both human (energy, time, skills of staff and volunteers, etc.) and material (space availability, financial costs, etc.). A process and tools for how to do this need to be developed.*

(2) Staff would be empowered to communicate back to the Dharma Council if any resource limitations make it advisable to revisit the scope or timing of the event. Resource limitations might be related to space, cost, staffing of event, conflicts with other activities at the zendo, resources to prepare for event, or anything else impacting successful organization of the event.

(3) Each event would be assigned an event coordinator from a pool of volunteers trained in this role. The event coordinator for a particular event will be identified by the event coordinator team lead in consultation with the event host. *The event coordinator will be responsible for tracking all aspects of preparation for and hosting of the event.* They will work with staff, the event presenter, and, if appropriate, the Mandala Council, to ensure space is scheduled, the event is publicized, materials are prepared, event staff is recruited, meals/snacks are planned for, event fees are collected, issues are addressed, etc. *The event coordinator is not doing this work, but rather, providing oversight to make sure all the pieces are in place for a successful event.*

B. Compensation for Abbots, Monastics, Lay Teachers, and Staff

Option 2 is recommended.

Option 2—Ensure the Board reviews and updates compensation plans for the abbots, other ordained, Lay Teachers, and hired staff annually.

The Board of Directors would conduct an annual review of compensation for the Abbots, other ordained, Lay Teachers, and hired staff, including salaries, stipends, cost of living raises, and retirement benefits.

Chapter 12: Finances

I. Overview

This section in the strategic plan focuses specifically on how to increase and maintain income needed to support the operation and maintenance of DRZC while reducing our current level of debt.

II. Current State

DRZC has an annual budget of \$330,000 (FY2018-2019). DRZC's annual budget in FY2010-11 was \$210,000.

In the 2017-18 fiscal year (Sept 1-Aug 31), DRZC's income was \$412,000, including \$33K net income from Frog Song Montessori Preschool, and expenses were \$329,000 (not including payment toward loan principals). Compared to seven years ago, income has gradually increased by 48% and expenses by 41%.

DRZC's fundraising efforts have slowly developed and increased over the last seven years as well. By selling our SE Madison St. properties, we raised sufficient funds to make a down payment on the Siskiyou property. We obtained grants amounting to \$752,000 from city, state, and federal grants (EPA/ RLF, Metro, National Fish and Wildlife Federation) as well as foundations such as Spirit Mountain Community Fund, which were used for required brownfield restoration work. On May 1, 2012, we kicked off the Lotus Blooming campaign and raised \$1,226,000 to build the Sodo. In December 2014, the SEMBLE crowdfunding campaign raised \$1,075,000 in loans allowing us to pay off the land sale contract on October 31, 2014. We recently completed the dormitories with \$43,000 raised through the Lotus Blooming II Campaign.

In 2017, we revised our membership pledge levels, creating five categories of pledged amounts that range from \$15/mo to over \$200/mo. Members pledging at any level receive access to the library and discounts on fee events. Membership is also required to vote for members of the Board of Directors and other issues that come up for a vote. Although some classes and events are open only to members, most events continue to be open to nonmembers. Thus, membership primarily indicates a personal commitment to support the Sangha and the Buddhist training that the Sangha embodies. Over the past year, membership has remained stable both in number and amount of pledges received.

At the end of each calendar year, a letter from the Abbot is sent out with an ask for year-end donations. We hold an annual fundraising event, which has been held in recent years at McMenamin's Kennedy School or as a garden party on the property. This event has brought in 6-28K annually (from 2014 to 2018) while serving as an effective community builder for members.

A. Benefits of Current State

We are able to provide many services and opportunities, and support a large, vibrant community, with a relatively small budget considering our size. We are financially able to take

care of our existing facilities and are slowly building equity in them. Dependence on volunteers requires relationships and participation amongst sangha members and provides valuable practice opportunities.

We have a dependable base of members and income from membership pledges. People can participate in the sangha no matter what level of financial support, if any, they provide to DRZC. It is clear to participants that DRZC uses money in service of the Dharma. Our growth in membership is due more to the strength of our core programs and activities than to any specific fundraising efforts, although we now have a membership director who is responsible for making the opportunity for membership visible to participants.

Fundraising efforts for costs related to developing the new campus have been highly successful, allowing us to build a Sodo and support buildings that are simple and elegant without being ostentatious, reflecting an esthetic of simplicity on a human scale.

B. Limitations of Current State

We are adapting to the expenses of our new property and will need to continue to monitor our budget to make sure we are able to accommodate these expenses.

Future building projects, required to complete the plans for the Siskiyou campus, will require additional focused fundraising efforts. As we continue to develop the campus, we need to take care not to burn out the good will of those who have so generously contributed so far.

As of August 31, 2018, we are carrying substantial debt which includes an outstanding balance of \$1,060,263 on a first mortgage and trust deed secured by temple grounds (known as SEMBLE) and an aggregate outstanding balance of \$186,987 for six unsecured loans with private parties. The first mortgage and trust deed will reach maturity during 2021 at which time the projected balance of approximately \$1,025,000 is expected to be refinanced with a new loan. The private party loans payoff according to varying dates through 2028. We need to continue to develop and monitor plans for reducing and eventually paying off these debts.

III. Potential Future States

The options proposed below are focused on fundraising and debt reduction.

Option 1—No Substantial Changes.

We would make no changes to what we are currently doing with respect to increasing membership or membership pledges, fundraising, or debt reduction.

Pros: Would allow us to take some time off from capital fund raising and from expending time and effort on building projects and further development of the property and turn our attention to settling into our new home.

Cons: We'll be postponing much needed facilities for expansion of programs and lose momentum on achieving our vision for the property. We would continue to carry significant debt with small payments on principal. We would risk taking on more programs and events than can be supported with a relatively fixed set of resources (revenue, staffing, space, etc.).

Option 2—Ask members to Increase annual giving for operating funds.

Members typically contribute to operating funds through membership pledges, at our annual fundraising event (Kennedy School, Garden Party, etc.), and in response to an annual year-end ask by the Abbot. This option proposes finding ways to encourage members to increase their giving through these and perhaps other means.

Pros: Asking members to increase their giving through these means is the most reliable way to increase income for operating funds. Done right, it can increase people's sense of ownership of the Center and build relationships. Celebrating the DRZC and sangha's value and achievements via a fun fundraising event can raise consciousness and build loyalty.

Cons: Requires sensitivity in order to make sure people know they are welcome no matter what level they are able to support the Center financially. As we have recently revised our memberships pledge levels, it may not be advisable to raise them again in the near future.

Option 3—Increase membership.

Build our membership in order to increase income from membership pledges as a way to grow a stable base of income.

Pros Increases income stability. Increases opportunity for development of cohort groups within the sangha as people coalesce around shared interests.

Cons May result in a loss of the intimacy as the sangha grows.

Option 4—Continue developing fundraising activities that appeal to the broader community beyond the sangha.

Continue hosting income-generating programming that serves people in the wider community as well as looking for groups to rent space on a regular basis.

Pros: Provides Dharma Rain with some additional revenue. Although not the intent of these events, some attendees may eventually choose to practice at Dharma Rain and become supporting members.

Cons: Need to continue to ensure these activities are consistent with Dharma Rain's mission while balancing the benefits with the cost in terms of financial, staffing, space, and other resources.

Option 5—Encourage planned giving.

Encourage more members to participate in our *Branching Streams* planned giving program, which allows members to include Dharma Rain in their estate plans. Several sangha members are already participating in this program.

Pros: Can be a good source of significant support with low pressure.

Cons: Planned giving helps with our long-range planning but not our fiscal year cash flow as availability of funds is unpredictable.

Option 6—Continue planning for debt reduction.

Continue to focus on how we might pay down our debts to a more comfortable level at a faster pace.

Pros: Lessens debt load which puts us in a better financial position to support programs and services, while also reducing financial risk. Gives us a period of time to regroup and settle into the new property before taking on more changes.

Cons: Diverts money from programs and day-to-day needs of the Sangha. Will require temporary curtailment of our plans for further development of the site, such as building a Dharma School building (which would be a means for increased revenue once it is in place).

IV. Sangha Input/Feedback/Concerns on this Focal Point

During the series of strategic planning meetings held to gather sangha feedback, several members expressed concerns about the financial stability of DRZC and the level of debt we are currently carrying. In general, comments in the meetings indicated support for a near-term focus on reducing debt while postponing further development of the site for now.

V. Recommendations

Combine aspects of Options 2-6 above. In general, the recommendation is to focus on increasing revenues for operating costs and on debt reduction in the immediate future.

Option 2—Ask members to increase annual giving.

Continue to develop the annual fundraiser by making it more inclusive (for example, a garden party is more easily made family-friendly than a Kennedy School event) and by keeping costs as low as possible while still making the event enticing and fun.

Continue the end-of-year ask by the Abbots, including an appeal to increase giving if possible. Asks can also be made of individuals, but this must be done carefully as many members have made substantial donations recently to our building campaigns.

Although raising membership levels is not an option at this point, as we have just recently adjusted them upward, an annual reminder to members about membership levels may result in some members adjusting their levels upwards over time.

Option 3—Increase membership

Make the option to join Dharma Rain and the benefits of membership more visible. This may include activities such as more frequent announcements on Sundays and Wednesday, posting information about membership on the Sodo bulletin board, and including a regular feature highlighting membership in some way in the e-newsletter. Other activities to encourage membership may also be appropriate.

Option 4—Continue developing fundraising activities that appeal to the broader community beyond the sangha.

Continue to develop fee-generating workshops with topics of interest to the general community, while ensuring that these events are consistent with our mission, do not overshadow Dharmic events offered to those engaged in Dharma Rain, and do not unduly strain existing resources (see Chapter 11: *Staffing*, Option 5 for a related recommendation).

Actively seek out groups to rent space on a regular basis, taking into account compatibility with our mission along with space and resource availability.

Option 5—Encourage planned giving.

Encourage participating in the Planned Giving program by making it more visible through such means as periodic mailings and announcements and selective approaches to members of the Sangha.

Option 6—Plan for debt reduction.

Planning for debt reduction is a Board responsibility. The Board will need to investigate refinancing options before the SEMBLE loan comes due in 2024. The Board should also keep in mind a stated objective of having three years of audited financial records in place by the time the SEMBLE loan comes due. (Also see *Chapter 13: Facilities*, Option 1)

Chapter 13: Facilities

I. Overview

Over the last six years, we have made a transition to our sangha's new home, which serves as a flagship location for the broader Dharma Rain sangha. Selling the Hawthorne-area properties and purchasing and developing the Siskiyou property has had a significant impact on all aspects of Dharma Rain, including dharmic programming, operational tasks and budget, retreat and residential atmosphere, accessibility, resiliency, and long-term financial position.

II. Current State

Dharma Rain Zen Center now owns a 13.75-acre parcel in NE Portland, that has a completed meditation hall (Sodo), a storage barn, and two (nearly finished) dormitories, as well as a doublewide trailer serving as an office, and developed landscaping and infrastructure. This campus is functional and is largely seen as beautiful, peaceful, and well-integrated into the natural environment and the surrounding neighborhood.

The acquisition and development of the Siskiyou campus was an arduous and fairly momentous undertaking that has had significant impact on the life of the sangha in the interim. The sangha has weathered the storm with grace and is putting down roots in this new location. As such, our net worth has risen to approximately \$3.3 million, up from \$300,000 in 2010. This growth came with considerable risk and has left the sangha with significant liabilities in terms of debt owed to members. Although much of the sangha relates to the temple buildings and grounds, there is a significant portion of the larger sangha which does not, including distant sitting groups, the thriving prison program, and others.

A. Benefits of Current State

- Concerns expressed the 2010 Strategic Plan have all been improved significantly including wheelchair accessibility; parking availability; ability to support a range of different programs; having room to expand and diversify over time; ability to host retreats; and integrating and expanding children's programming.
- The temple buildings and grounds provide several additional benefits, such as significantly higher visibility on a regional level; a strong sense of place; and considerably more integration with, and influence on, the local neighborhood. Many people come in contact with the temple just by walking through the grounds.
- Furthermore, having 8 acres of greenspace, including 4 acres of native habitat, around the temple proper provides a sense of peace, seclusion, and connection with nature for members and the surrounding community. The broader ecological community also benefits, and this is seen as an example of Dharma Rain's commitment to sound ecological and sustainability principles. A *Statement of Environmental Stewardship* that describes in more detail the implications of this commitment will be made available in the Documents section on the Dharma Rain website.

- The eventual development of a cohousing community on a portion of the land is seen as a benefit, as it will increase local use of the temple and provide a larger pool of people stewarding the site.

B. Limitations of Current State

- The largest challenge is our debt. Dharma Rain owes about \$1.2M in unsecured member loans, which is a large amount for a nonprofit of our size and budget. We have not made significant progress in paying down this debt in the last 4 years, and it will likely be a long process. During this repayment period, risk increases and opportunities are curtailed while operating funds are being used for debt repayment.
- In addition, we have given up some control of the land (collateral and a two-acre portion) to Siskiyou Cohousing LLC, as part of the site development process. That two-acre portion is likely to be developed into multifamily residential buildings over the next several years, increasing the density on the site.
- Another concern involves resiliency in the face of climate change or natural disaster. We have established a set of procedures for natural disasters and our site is relatively safe seismically. But we also have only a limited cache of natural disaster food and emergency supplies and may be perceived as being more of a neighborhood resource than is actually feasible.
- Finally, the development of the site is incomplete. We are limited in the scale of our residential and children's programming and, given the fullness of the schedule, do not have space available for rental groups, special events, or for significantly larger attendance at our main events. In the short-term, there is ambiguity about what activities get access to space, and how that is decided. The long-term plan is to build a dharma school building, a hondo, and an administrative building to meet these needs.

III. Potential Future States

Three different scenarios for addressing Dharma Rain's facilities needs are described below. Other possibilities were considered, but this is the list that survived culling.

Option 1—Responsibility to Debt

Focus on paying down debt, while putting off other projects. Reup the Semble/Blade of Grass loan for as low an interest rate as possible, for an additional 7-year term. If we don't make changes to what we're paying towards debt, after 7 years, we will still owe \$750,000. To decrease the debt load further, our loan payments could be increased. This option describes an increase in our loan payments by:

- Putting effort into increasing membership dues to enable these increased payments. (See *Chapter 12: Finances*, Option 3)
- Encouraging planned giving through the "Branching Streams Society" as a way of decreasing our debt load over time. (See *Chapter 12: Finances*, Option 5)

- Clarifying and communicating to the sangha the connection between low debt liability and increased flexibility, responsiveness and long-term security for Dharma Rain.

Option 2—Aggressive Refinance

As the Semble/Blade of Grass loan becomes due in the next several years, attempt to refinance the remaining debt by taking out more. The goal would be to take out a \$2,200,000 loan. This could happen through one of several different mission-based lenders who have shown interest in this scenario. The plan would be to pay off the remainder of our Semble/Blade of Grass debt and utilize the extra money to construct a 5-classroom Dharma Garden building. This building would allow Frog Song to expand significantly, adding infant care, an additional preschool class, and 1-2 more grade levels over several years. It would also allow residential use of an additional unit in the dormitories, adding 3-4 private rooms for residential use. These expanded income streams would provide Dharma Rain with additional operating income sufficient to pay down the larger loan. On the other hand, it would also increase our risk profile.

Option 3—A la Carte Tactics

The third option includes several different possibilities that could be utilized in concert or individually, or even as an adjunct to the first or second option. Alternatives include:

- *Look for opportunities to further leverage the site.* Undeveloped areas (such as areas planned for future buildings, or the savanna) could be leased short term for some uses or leased long term for development as a way of increasing income. This would probably come at a significant cost to the livability/feel of the temple, but it might be worth it under some circumstances.
- *Stay tuned to the real estate market and look for cost-effective times to purchase surrounding properties* that could be used to supplement on-site capacity. A neighboring home could be used for residents, dharma school, private retreats, visiting teachers, or some meetings, and could conceivably be a revenue source.
- *Construct one or two small structures to supplement short-term residential, private meeting, and retreat space.* This alternative would be low-cost, low-risk and fairly low-impact on the site. The goal would be to improve flexibility and add to the sense of container and safety. Structures would be classified as unpermitted sheds, requiring a small footprint and no plumbing. However, they could be built cheaply, in-house, without needing to do the extensive subgrade improvements associated with larger structures. There are two locations set aside for such structures.

IV. Sangha Input/Feedback/Concerns on this Focal Point

Through sangha forums, individual conversations and board discussions, our summary of the prevailing sangha opinions on this topic is as follows:

Pros: On the positive side, local members are quite happy with the look of the main building, the site overall, and are excited about the dormitories. Many visitors find the overall site beautiful and inspiring. We have also heard appreciation for how visitors feel integrated into the natural environment and for the development of ecological programming

associated with the natural areas of the site. Overall, the campus does what it is intended.

Cons: On the negative side, a widely held opinion is that our level of debt is a significant limiting factor for the sangha. In addition, the extensive amount of effort, disruption, and risk associated with facilities over the last five years has led to some fatigue amongst the membership. This is evidenced around a lack of interest/enthusiasm for fundraising and construction activities, as well as some wariness around the extent of our growth, and how large or complex the sangha might become. Concerns have been expressed about having staff and volunteer resources to keep up with care of the buildings and grounds. We have also received some comments regarding clutter around buildings, as well as acoustic and storage difficulties with the Sodo. Finally, there have been safety and hygiene concerns related to unauthorized use of the site by houseless people.

V. Recommendations

- Pursue **Option 1—Responsibility to Debt** at least for the next 5-10 years, with the possibility of drawing piecemeal from **Option 3—A la Carte Tactics**, especially the alternative to construct one or more small structures to supplement existing space.
- Create a set of priorities for guiding allocation of space for events and programs. For a related recommendation, see **Option 5—Establish a process for reviewing proposed special events to ensure a balance of priorities and resources and provide a means of oversight for facilitating successful events** in *Chapter 11: Staffing*.
- Increase engagement of temple volunteers and partnerships with outside groups to assist with upkeep and maintenance of temple buildings and grounds.

Appendix A: Plan Monitoring and Evaluation

I. Ongoing Monitoring

The Strategic Planning Committee recommends the formation of a 3-5 member Plan Monitoring Committee (PMC). This committee would be comprised of members drawn from or delegated by the Strategic Planning Committee and include at least one member each from the Board, from the Dharma Council, and from the Dharma Garden Council. Members should be willing to commit to meeting every three months for a minimum of the next five years.

The PMC is responsible for determining an appropriate timeline for different aspects of the plan, in consultation with relevant councils, staff and team leads. During meetings, PMC members are charged with reviewing plan recommendations and goals and determining whether satisfactory progress is being made. Meeting minutes should be kept, and after each meeting a plan status report should be sent to the Chairs of the Board and Dharma Council. The Board and Dharma Council can adjust PMC membership at their discretion if plan monitoring functions are not proceeding satisfactorily. At its annual retreat, the Board should review the past year's strategic plan progress.

II. Amending the Plan

In June of each year, the Chairs of the Board and Dharma Council are charged with touching base to determine if any amendments to the plan are needed. If amendments are in order, the Board and Dharma Council will schedule a joint meeting to consider and discuss the amendments proposed. Amendments will be adopted based on the group consensus of this joint meeting. Amendments to the plan should be limited to one amendment (or set of amendments) per calendar year.

Appendix B: Communication of Plan

These are the steps for approval and communication of the plan:

1. Strategic Planning Committee will send a finalized plan to Dharma Council and the Board of Directors for review and approval when ready.
2. A link to an electronic version of the approved Strategic Plan will then be sent via email to Sangha members. A few paper copies will be made available to those who don't receive emails.
3. The sangha will be given two weeks to ratify the Strategic Plan via Survey Monkey or by letter. Approval by at least 50% of those responding is required for ratification.
4. Once the Plan is approved and ratified, it will be posted in the Documentation section of the website and a link included in the weekly e-bulletin. A printed copy will also be made available in the office.

Appendix C: Strategic Planning Process

This appendix provides an overview of the planning process used to generate this strategic plan. The planning process was initiated by the Board of Directors, with the recognition that the then current strategic plan, approved in February 2011, was significantly out of date, having been created before our move from the Madison location to the Siskiyou site and with a number of the objectives outlined in the plan having been met.

A Strategic Planning Committee was formed in May 2018. Members included the Co-abbots and representatives from the Dharma Council, Board of Directors, and Dharma Garden Council. The goal was not to create a new Strategic Plan from scratch but to review the 2011 plan and update it as needed.

Our approach was to assign each chapter to someone on the committee who was most knowledgeable about that particular area. As time went by, we came to see that we needed to reorganize the existing plan to respond to changes in priorities since 2011. For example, the 2011 plan emphasized the need for a new facility, but we were now well established in our new home.

As DRZC's focus has turned toward considerations about how to support our growing sangha, other concerns have come to the forefront, such as how we communicate with our members and the community at large and how we can best support our aging and differently-abled members. And as our perspective has broadened, we've begun to grapple with issues related to diversity, equity, and inclusion. Although we are still at an early stage of ownership, understanding and engagement with these issues, we wanted to allow some of what we've learned so far to be reflected in this strategic plan.

Ultimately, we settled on the following topics and assignments for the new strategic plan.

- *Our Mission and Vision* – Kakumyo Lowe-Charde, Abbot
- *Supporting Rigor in Practice* – Michael Gyoshi Kaplan, Dharma Council
- *Caring for the Sangha Treasure* – Jyoshin Clay, Board of Directors
- *Children, and Families, and Young Adults* -- Nicole Ko'in Newsom, Diana Shin'yu Vitells, J Kakuon Christian, Dharma Garden Council
- *Prison Program* – Genko Rainwater, Dharma Council
- *Cohort Groups* – Heidi Enji Hoogstra, Dharma Council
- *Affiliated Groups* – Kyri Kengan Treiman, Dharma Council
- *Communication* – Kakumyo Lowe-Charde, Abbot
- *Leadership and Succession* – Genko Rainwater, Dharma Council
- *Staffing and Finances* – Jyoshin Clay and Linda Hoka Bebernes, Board of Directors
- *Facilities* – Kakumyo Lowe-Charde, Abbot

The Strategic Planning Committee has met as a group three times to share ideas and work through issues across these topics. They also met with groups of sangha members to gather input for the strategic plan. Two of these meetings were attended by sangha members in general and one meeting was attended by disciples.

The strategic plan was compiled and reviewed as a whole by the committee in the Fall of 2018. It was then approved by the Board and Dharma Council. A link to the document was then sent out to the Sangha to review and ratify. The final 2018 Strategic Plan then was posted in the Document section on the DRZC website.

Appendix D: Temple Tradition and Culture

Dharma Rain Zen Center
Portland, Oregon

Our Lineage Tradition and Temple Culture

Prepared by the Elders' Council, 2010
Revised by the Elders' Council, 2018

I. Introduction

The Elders' Council of Dharma Rain has prepared the following outline of the spiritual traditions and social customs that characterizes and distinguishes the style of practice at this temple. Some of these traditions and customs are rooted in ancient practices, while other are a response to our current time and the culture of our broader world. The Dharma Rain community strives to be a warm and welcoming place, while upholding the forms and expectations necessary for disciplined Zen practice. We honor a variety of practice expressions throughout the life span, including both lay and monastic paths, family practice, and sesshin. This outline assumes a basic understanding of Zen Buddhism and traditional Soto Zen practice.

II. Founding Teachers and Traditions

The roots of the traditional practices of our temple are traced from the teachings of Shakyamuni Buddha; the Mahayana traditions of Madhyamika and Yogacara; the Chinese ancestors of Caodong Chan; and Japanese ancestors and founders of Soto Zen: Dogen Kigen and Keizan Jokin.

A. Dogen Kigen and Keizan Jokin

The teachings and traditions of both Soto Zen ancestors Dogen and Keizan are fundamental to the style of practice embodied in this temple, which exemplifies:

- Dogen's rigorous personal standards and comprehensive teachings
- Keizan's intuitive and more devotional approach to practice
- An emphasis on enlightened qualities of the celestial Bodhisattvas, Kanzeon, Fugen, Monju, plus Fudo
- A history of inclusiveness that honors women as well as men

B. Meiho Sotetsu and Manzan Dohaku

Our style of practice honors the practice style of Meiho Sotetsu and his transmitted descendants through Manzan Dohaku; who emphasized the indispensability of shikantaza, everyday koans, face-to-face student-teacher relationships, and importance of community outreach.

C. Keido Chisan

We honor Keido Chisan Koho Zenji as co-founder of our temple, whose compassionate actions opened the Dharma to us in this country, and who saw beyond the cultural prejudices of his time.

D. Jiyu Kennett

We acknowledge our roots from Shasta Abbey through Jiyu Kennett and honor her as our temple's co-founder, an innovator and pioneer for establishing Soto Zen in our country. She continues to influence our temple through her teachings and by her innovations. Specific influences from Jiyu Kennett include:

- She brought and adapted the formality of the Japanese monastic-style of practice and form to this country.
- She introduced and adapted the Segaki traditions to our Halloween to remember and address the ghosts of our personal and collective karma.
- She introduced and adapted the five ceremonies of Jukai with its connection to the Buddhist liturgical cycle and the teachings of Tozan's Five Ranks and the Shushogi.
- She emphasized the everyday life as a koan (Genjokoan), examining the Bodhisattva precepts as koan study.
- She developed a liturgical calendar that corresponds with our annual cycles.
- She designed a rigorous form of postulant training for aspiring monks as a gateway to ordination.

E. Kyogen Carlson

We honor Kyogen Carlson as our founding Abbot. Though we chose to disassociate from Shasta Abbey in 1985, he brought the Abbey's forms to our temple and trained us in them. From the beginning, he guided us towards a primary focus on lay Soto Zen practice. His contributions include:

- Creating a training path for Lay Disciples
- Creating a transmission path for Lay Teachers
- Setting a clear example for the teacher-student relationship
- Starting a seminary program for in-depth Buddhist study
- Championing the creation of the Lay Zen Teachers Association
- Initiating and encouraging outreach to prisons, other religious groups, and other Zen Buddhist sanghas
- Continuing to emphasize the primacy of retreat and zazen practice
- Continuing to support a rigorous form of postulant training as a gateway to ordination

F. Teachings and traditions within the larger Soto Zen community

We honor our lineage and spiritual traditions through contact with teachers and temples both globally and within our lineage tradition in Japan.

We honor our lineage and spiritual traditions by deepening our connections to the larger, western Soto Zen community through:

- The use of an American Sotoshu standardized translation for liturgical services
- Active participation in the American Zen Teachers Association (AZTA); Soto Zen Buddhist Association (SZBA); Lay Zen Teachers Association (LZTA); and Gen X Dharma Teachers.
- A special recognition of Nyogen Senzaki, a pioneer and early teacher of Zen in this country.

III. Core Teachings and Practice

In our practice, we work to save all living beings.

A. Morality (sila), Meditation (dhyana), and Wisdom (prajna).

These three paramitas are particularly emphasized in our teachings and practices as the gateway to enlightened actions, but other paramitas are also cultivated (generosity, patience, effort).

B. Shikantaza or Zazen

We emphasize this form of meditation practice that was described in Dogen's Fukanzazengi.

C. The Sixteen Bodhisattva Precepts

We emphasize the study of and conformance to these particular precepts, not as restrictions but as guidelines for the functioning of enlightened beings.

D. Recognition of kensho

We recognize the occurrence of kensho, intuitive experience and the self-realization of our nondual, essential nature. While we recognize and acknowledge the sudden insight type of kensho, we do not present it as a goal of practice. We recognize ongoing insight and transformation through practice as an essential aspect of the Bodhisattva path.

E. Equity statement

Dharma Rain acknowledges that suffering is a human condition made worse by bias and prejudice toward people based on race, ethnicity, income, gender, gender identity, sexual orientation, disability, and other traditionally marginalized identities.

We acknowledge the individual and collective impact of privilege, bias, and prejudice in our own sangha, and within American Zen. We commit to address our structural inequities as an institution.

We welcome and affirm all who come here to seek the Way and celebrate our differences while harmonizing the one and the many.

F. Recognition of Horizontal and Vertical Teaching Function

Within our spiritual community, we emphasize that there are multiple opportunities for teaching and learning.

- In teaching function, the vertical can appear in the horizontal, and the horizontal in the vertical. In vertical teaching, rank is fluid. We train toward the ability to lead and to follow with equanimity or to move into or out of rank seamlessly. This form of sharing is encouraged as a demonstration of a mature practice of the Middle Way. In horizontal teaching function, we teach by example, side by side.
- We recognize the formal teaching relationships and paths for both monks and laypersons. Within our community, we acknowledge monks and priests who have completed postulancy, been ordained, follow the schedule and reside at the temple. Within our community, we acknowledge senior lay practitioners who exhibit a high level of integrated practice and who are seen to model that understanding in the complex world of the layperson away from the temple. Members of either group can be transmitted and authorized to give precepts, perform ceremonies, lead retreats, and offer teachings in public or private.

IV. The Tradition of Group Practice

We acknowledge that within the totality of existence the process of enlightenment is a collective, shared experience; therefore, we emphasize group practice opportunities as expressed in the following customs:

A. Cooperation and encouragement

We emphasize cooperation in all spiritual activities and we discourage comparisons, as competition reinforces the illusion of spiritual dualities.

B. Formal practice in community

We encourage formal group practice by frequently participating in regular meditation and sesshin at Dharma Rain.

C. Moving as group

During sesshin, we derive intensity from staying in accord with the group; following the same schedule, doing the same activity at the same time, and placing less emphasis on individual practices like formal koans or yaza.

D. Enlightenment is communal

We recognize that the depth or maturity of one person's practice or experience is a direct reflection of the depth or spiritual maturity of the group.

E. Monastic practice

The training of monks requires complete immersion into community practice, with limited privacy or autonomy.

F. Family Practice

For children enrolled in Dharma Garden, we emphasize that family practice is an integral part of individual practice and understanding.

G. Practice without forms

We recognize the importance of ebb and flow of practice. During temple breaks and free time, we practice without traditional forms and structure, taking these opportunities to internalize our practice.

H. Home practice and vows

As daily life may mean our practice is often physically removed from the temple, we encourage the taking of practice vows for periods of time. While these vows are actualized in the world, they can be formally taken before the sangha, giving an opportunity to acknowledge and practice our individual vows together.

V. Contemporary Temple Culture

The culture that has developed at our temple is a living, changing phenomenon that is held at any moment in unison with all other members of the temple community. Features of our culture are listed below.

A. Inclusivity

- The opportunity to practice and participate in activities at our temple is available to everyone. There is a place for everyone regardless of background or capacity.
- We encourage practicing with other traditions, especially for senior members.
- We acknowledge and encourage the special needs of the various groups within our temple community and create opportunities for practice that meet different needs. We recognize differences non-divisively.
- We acknowledge and value our connection to the earth and non-human beings.

B. Personal warmth and friendliness

Our group persona is one of friendliness and candidness. We encourage lateral friendships. We attempt to create an inviting and casual atmosphere for social interactions. We encourage self-disclosure in nonjudgmental and protected surroundings. We strive to be welcoming, providing guestmasters, special programs, and practice advisors to assist newcomers to becoming part of the community.

C. Openness and integrity

We encourage and, whenever appropriate, foster open-handed exchanges in relationships and communications. We value directness, frankness, and sincerity in all our interactions. We encourage a friendly, family-like atmosphere for those functioning at the temple through customs such as sharing duties and practicing right speech. We have clear ethics, grievance and reconciliation policies and standards in place. Our customs and activities are grounded in and display openness to the general public without proselytizing.

D. Family customs and activities

We honor and include the family, family relationships, and our children as part of our community, our customs and our social events.

E. Diversity of programing

We encourage our members and non-members to explore the Dharma through our wide variety of programs:

- We offer workshops to the community at large.
- We provide various discussion groups, classes and seminary classes.
- We have multiple programs for children and families.
- We have numerous programs for caring for sangha members with special needs.
- We have multiple ango periods, sesshin and weekend retreats throughout the calendar year, as well as a daily monastic schedule that the general public is welcome to attend.
- We assist and offer the Dharma to those in correctional institutions through our prison sangha support groups
- There are several affiliated and independent satellite groups in distant communities for those unable to journey regularly to Dharma Rain.

F. Local cooperation and involvement

We place a high value on the importance of local cooperation and open communication with other religious lineages and traditions, as well as other mission or value-aligned organizations.