

 Dharma Rain Zen Center

Strategic Plan Overview*

February 4, 2011

*This overview only includes strategic recommendations and goals. The full version of the strategic plan contains significantly more information, including an analysis of our current state, options considered and their pros and cons, sangha feedback on each focal point, and how the plan will be monitored and amended.

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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 both be accessible and offer 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; offering the Dharma for free or at relatively low cost.

In the past several years our sangha has intentionally and successfully transitioned from a pastor-centered community with 50-150 active members, to a program-centered community with 150-350 members. As this has occurred, our financial, physical, administrative, and spiritual resources have been 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. Although the recommendations and goals in this document include a range of target completion dates, this plan is intended to function as an organizational road map for the next 15-20 years.

This document addresses the following focal points:

- Facilities
- Rigor in Practice
- Children and Families
- Succession and Leadership
- Related and Cohort Groups
- Staffing and Finances

The Strategic Planning Committee would like to express its deep gratitude to all who participated in the strategic planning process and so 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.

Mission and Vision

This section describes the mission and vision of Dharma Rain Zen Center. The mission statement is copied from our current Articles of Incorporation; the proposed vision statement was developed by the Strategic Planning Committee as a supplemental frame of reference for our planning efforts. Strategic recommendations in subsequent chapters of this plan were drafted with the intention that they should support and align with our mission and vision.

Mission (Why we exist)

Primary Purpose: To provide for the Transmission of the teachings and practice of Soto Zen Buddhism. To be a sanctuary of Buddha, Dharma, and Sangha in such a way as to cultivate compassion, love, wisdom, and understanding within the members. To preserve the Transmission lineage. To promote lay practice first, but also provide for priest training. To provide the facilities and support the priests necessary for these ends, and to meet the religious needs of the members, their families and the community at large. To provide the traditional religious services, counseling and instruction of a Soto Zen Temple, and to provide additional facilities such as retreat centers, affiliate temples, etc. as deemed necessary by the membership to fulfill these purposes.

Secondary Purposes: To provide a framework for other activities as may be deemed useful by the sangha for their development in practice, e.g., the study of psychological matters and family issues, the promotion of social or charitable works, education, etc. These purposes should be an adjunct to the Primary Purpose, and support that purpose without outweighing or obstructing it.

Proposed Vision (How we carry out our mission)

- Acknowledge the importance of Way-seeking mind by making the Dharma available to all
- Respond skillfully to those who ask for the Dharma
- Make the rigor of monastic forms accessible to lay people
- Provide a visible example of the transformative power of practice through committed ordained and lay practice
- Operate in an ethical, environmentally sustainable, and fiscally responsible manner
- Model practice as integrated with all aspects of life
- Nurture depth in the sangha by:
 - Recognizing the central place and transformative power of zazen in our practice;
 - Encouraging courage and intimacy within the sangha, deep commitment to Zen practice, and the release of suffering;
 - Recognizing and fostering the transformative power of the student-teacher relationship.
- Make the Dharma widely available by:
 - Providing an array of doorways into the Dharma, offered in ways that are appropriate for a diverse spectrum of people;
 - Offering programs that are living expressions of love, compassion, and wisdom;
 - An explicit commitment to inclusion and openness;

- Minimizing obstacles by offering the Dharma at low or no cost, and without requirements or commitments where appropriate.
- Teach and demonstrate the interdependent nature of ordained and lay practice by:
 - Honoring the ordained and lay paths as equally valid and worthwhile, and as each having the potential to lead to the same awakening and liberation;
 - Honoring the ordained and lay paths as different, and as two essential components of the sangha mandala;
 - Ensuring that lay practice does not become marginalized, resulting in lay practitioners observing or primarily supporting practice financially rather than participating in it fully.
 - Ensuring the presence of ordained practitioners within the sangha, though they will always be a small minority, is valued not just because of their work in service of the sangha, but also because of their monastic experience and their rigorous training in the lineage tradition.

Facilities

An overview, analysis of current state, potential future states that were considered, and a summary of sangha feedback on this focal point are available in the full-length version of the strategic plan. This document is a condensed version of the plan and only includes the strategic goals/recommendations that will be pursued.

Recommendations

Pursue a single or dual campus option.

A. Establish Search Group

Form a property search group of 4-8 people to investigate possibilities, refine the search criteria, prepare for buying property and communicate with the sangha about this process. This group reports to the Board and is made up of candidates with time to contribute, a significant history of high (and preferably broad) involvement with this sangha, relevant professional expertise to offer, and exposure to other temples/centers function and facilities. This group could draw from the Strategic Planning Committee, Operations Committee, Board of Directors, Elders Council, and other groups in the sangha. An invitation will be sent to those who may meet these criteria, to see who may be interested in participating. The search group would use the following set of core Guiding Principles to conduct the search process.

B. Guiding Principles

- The sangha needs to know about important developments, be invited to tour facilities of particular interest, and be given the opportunity to contribute information, insights and opinions.
- The search group will endeavor to find a solution that will minimize any disruption of services, programs, and events.
- We are looking for a facilities situation that will last for the next 20 years. We could have as many as 350 members by that time, and want to eventually be able to accommodate the needs of a sangha that size in the facilities we develop.
- We are looking to provide the sangha with the stability that comes with owning property; leasing is not desired.
- The property we develop will have a human-sized, friendly feel that resonates with our values of simplicity, accessibility, and a relationship to practice that is direct, personal, and pragmatic.
- If the dual campus option is chosen,
 - We will keep the sangha practicing together for the primary public events, Sunday morning and Wednesday evening.
 - We will actively work for integration of the two locations on many levels.
 - Both locations will be interdependent, the Zen Center depending on the residential facility for retreats, and the residents using the Zen Center for classes and other events.
 - We will work to build awareness of differing methods and venues for practice, and to encourage a broad engagement with the dharma.

- Although the purchase of property is a significant expense and is likely to stretch the sangha's resources, any decisions will be fiscally responsible. The search group will treat the sangha's resources with respect, ensuring that a concerted effort is made to make well-informed, sound, and creative financial decisions in buying and/or selling property. There should be a reasonable level of confidence that the sangha can continue to make any necessary ongoing payments. Significant expenses that are necessary to make a property usable, or that are likely to be required in the next ten years, should also be considered.
- The search group is held to Dharma Rain's organizational ethical standards and is a model for harmony and integrity. The individuals that make up the search group treat the process as work practice and an opportunity to practice with and express wisdom, patience, willingness, and mutual respect.
- Any decisions are to be made within a broad context, considering the needs of Dharma Rain, the broader sangha, the local, national, and global community, and the natural environment. The search committee will try to ensure that our impact on the site (e.g., building or renovating structures), the surrounding area (noise, parking), patterns of use (travel time, upkeep) are responsible and sustainable in both human and material terms.
- There is not a hard timeline for finding a solution to the facilities problem. Starting the search quickly is important, but we are not under excessive time pressure to complete it. It is more important to trust the discernment process and find an appropriate property that can meet the sangha's needs thoroughly. It is advantageous to move as soon as it is feasible, so the soft expectation is that a suitable property will be found by 2013.

C. Position for Move

By March 2011:

- Adjust Operations Committee priorities to maximize resale value of Sangha House and Dharma House, and to prolong use of Zendo. Buying the credit union parking lot stays a high priority, as does improving handicapped access for the Zendo.
- Investigate selling the Sangha House to get an idea of how much it may be worth and what we might need to do to it first.
- Begin positioning financially to be able to pay out around \$120,000 towards closing costs, on short notice. A loan may or may not be necessary depending on the timing of selling the Sangha House.

D. Start Search

By June 2011, and preferably before, begin actively searching for potential properties, looking for any of three possible fits:

- Monastery/Residential & Retreat Facility within 30 minutes drive of downtown.
- Centrally-located Zen Center with space for multiple events and dedicated Dharmagarden space.
- Large, flexible, moderately central facility that can have residents, retreats and Dharmagarden.

The decision whether to go with option two or three will depend on what is available on the market and how well the various property options fit our search criteria, guiding principles, and

financial situation. The ease of acquiring and transitioning into a given property would also be a significant criterion.

There are pros and cons to buying either half of the dual campus first. If we went with the dual campus model, it may be easier to buy the monastery property first, because we could maintain our current programs and most of our facilities during the transition. On the other hand, buying the monastery property doesn't relieve the current crowding that we experience, particularly on Sundays. If we bought the Zen Center portion first, we risk the stability and momentum of the residential container, along with the majority of staffing resources, as we would either have to disperse residents into private housing, or shrink the number of residents until residential property is acquired.

E. Buy Property

When a good fit is identified and researched, the Search Committee will bring their recommendation/s to the Board of Directors. The Sangha House may need to be sold before a purchase is made. The decision to buy & sell property comes from the Board. It is the Board's role to determine financial feasibility of the Search Committee's recommendation/s, and when the sangha has embraced the plan. Once these criteria are satisfied, then a purchase can be made.

Rigor in Practice

An overview, analysis of current state, potential future states that were considered, and a summary of sangha feedback on this focal point are available in the full-length version of the strategic plan. This document is a condensed version of the plan and only includes the strategic goals/recommendations that will be pursued.

Recommendations

We recommend the following:

A. Sesshin:

By 2015, increase the number of weeklong sesshin each year to 6. Developing the ability to hold sesshin on our property is a high priority, as is offering a sesshin during the summer or during the week between Christmas and New Years. Have some retreats that allow flexible attendance or participation, as well as some that are closed once they begin, or are open only to more advanced practitioners. Hold a zazenkai or similar event 11 months of the year. The goal is to triple the number of person-days devoted to silent, formal practice from approximately 400 (2009) to 1200 (2015).

More frequent sesshin could be accommodated by skillful use of current facilities (such as using the Sangha House for sleeping accommodations), and by integrating sesshin participants with Wednesday evening and Sunday morning public programs. This could have the added benefit of making sesshin more visible to the sangha at large.

B. Residency:

Much of the specifics of how residency is developed may depend on the Facilities and the Succession and Leadership Focal Points. The intent is to transition to offering a more intensive, formal schedule for those who want to take advantage of it. This could include increased zazen, contemplative or silent mornings, and more formal or structured meals.

For the period that someone is in residency, Zen practice should be the most important priority for them. However, it does not necessitate that all who are living there follow the schedule full-time; it would still be possible to maintain some level of outside employment.

Differentiate between guests, residents, and staff: Guests could be anyone who agreed to respect the rules, would not be obligated to follow the full schedule, and would pay a higher price. This category may include private retreatants, visitors, and those in hospice or eldercare situations (on a case-by-case basis). Residents would have more responsibilities, would be expected to participate in the schedule as much as possible, and would pay a market rate for room and board. Staff are those who are on the schedule full-time and do not pay room or board. Staff might include those who have either been residents for a year and have taken discipleship, or have been a resident for 2 years and have taken the precepts. This would allow intensive residential practice without the necessity of a monastic commitment. Part-time visitors would be either guests (off-schedule) or residents (on the schedule).

Entry requirements are shifted: Application goes through residential review committee, which includes a member of Board, Dharma Council, the Doan, and residency Team Leader. Applicants must be a member, but the 1 year requirement of involvement and two year limitation on length of stay are waived. There will be a mandatory residency review for each resident every 4 months for the first year, yearly after that.

C. Schedule and Calendar:

Starting in Fall 2011, simplify yearly calendar to more closely accord with the training cycle, to fit better with school year, and to keep fall term as a unit:

- Have two ~90 day Ango periods each year, corresponding to fall and spring terms. Fall Ango starts Sept 1st, and includes all of October and November, through the end of Rohatsu. Spring Ango becomes March, April and May.
- These periods are marked by term student programs, intensified daily practice schedule, and opening/closing ceremonies.
- Summer term is June, July and August, with a lighter schedule and an emphasis on community, informal or outdoor events.
- Winter term runs from the end of Rohatsu through the end of February.
- Keep both the residential and the Sunday and Wednesday schedules consistent, despite special events. For instance, even if a special retreat were being held, Sunday service would be offered.
- To ease understanding of the Center's schedule, publish separate calendars for public events (e.g., classes and sitting) and for the daily residential routine.
- More intense residential schedule, see above.

D. Formal Container:

The best way to spread knowledge of formal practice is to make the mature practice held by long-term members more visible. An increase in number of sesshin, visibility of residential practice, and emphasis on formal practice during Ango, should all contribute to a greater fluency with and respect for the forms within the sangha at large. However, the most effective way for members to develop a sense of the sacredness of everyday life is to see the mature practice of other members in the context of everyday activities. The Daoren Circle is exploring this point.

Apprenticeship opportunities are especially valuable in this regard. 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 Mandala Model already provides the practical structure for developing members' skills in keeping the temple running. Its capacity as a vehicle for spiritual training is currently underutilized. We recommend that the Mandala Council, perhaps in consultation with the Godo and/or Dharma Council, review the orientation, mentorship, and oversight of team leads and trainees to emphasize trainees to emphasize the Dharma of each temple job. This could be accomplished by:

- Formalizing the mentoring process for all jobs, with the current process for training in ceremonial roles as a model.
- Intensify Mandala Council's involvement, emphasizing leadership in non-teaching roles.

- Adding a small amount of ceremony to the beginning and end of a work period. This could be as simple as the Hymn to Daikoku or Great Vow's work period chant and the beginning of a work period and a Dedication of Merit at the end.

E. Mature Lay Practice:

Having advanced classes, groups, or retreats for senior members is one strategy for addressing this, as evidenced by the Daoren and 7-Up groups. Modifications to the other areas of concern identified above will also affect this category. For example, more frequent sesshins would provide opportunities for Seniors to train in roles such as Tenzo, enabling lay-led retreats. This point is also addressed in the Leadership section of the Succession and Leadership chapter of this plan.

Explore restructuring the role of Shuso, both to provide increased opportunities for deeper challenging practice and to meet the changing and expanding needs of the community. Possible options to consider include:

- Two Shusos, one for each campus (assuming the dual-campus facilities option).
- Lay and ordained Shusos working together.
- Two shorter, more intensive Shuso terms per calendar year.

Children and Families

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Recommendations

- This year (2011): To take care of the children who are already involved in our programs, we need to rent more classroom space and recruit more teachers.
- To answer the needs of parents and families we should assemble and distribute a directory of parent's families and teachers to facilitate communication and social opportunities.
- To further the support of the spiritual development of the parents, we should schedule annual family retreats starting in 2011, contingent on staff and volunteer support.
- To facilitate the integration of families with children into the larger sangha, there should be at least one dharma talk per year that is focused on everyday issues and relatively free from unexplained jargon.
- Schedule a game night (or afternoon) or similar all-invited event per year. These points will all require the cooperation of the Dharmagarden steering committee and the Dharma Council.
- Elicit suggestions for better meeting the needs of young adults, and experiment with different programs to address this group. To this end at least two people should be tasked with this and start experimenting by the summer of 2011. One person should be sitting on the Dharma Council and another should have been involved in Dharmagarden. By 2013 we should have at least one program annually (retreat, class series or other) that is particularly geared for young adults. If we design something that is successful, we may increase the frequency as seems prudent. Dates for this goal are subject to revision based on success and interest (or not) of the young adult cohort.
- Until larger more flexible space can be acquired, we will need to make do with what we have. This necessitates renting one or more office spaces for dharma school Sundays. However, within the coming year (2011), a search committee should form (see Facilities chapter of this document) and begin to look for properties that will allow either the cell division or skin shedding option to move forward. The best outcome for children and families is if the emphasis is placed on the desirability of a single unified but complete campus. If this is not attainable, some version of the cell division option could be a good one, especially if it is seen as an intermediate step. At least one of the people on the facilities search committee should be familiar with the Dharmagarden programs and the needs of families.
- Increase emphasis on the practice of parents, possibly requiring them to attend a class if they're not already active members. Require membership for families. Increase parent volunteer time to support programs and events for families and children.

Succession and Leadership

Succession

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Recommendations

- By June 2011, establish a Succession Committee. The committee will be composed of Kyogen, Gyokuko, and 1-2 representatives each from the Elders Council, Dharma Council, and Board. Each council will choose internally which representatives they will send. This Committee will meet no less than annually.
- Kyogen and Gyokuko to notarize, date, and file a Successors List by August 2011. It is understood that this list is only used if they are unable to communicate their preferences.
- By October 2011, the Succession Committee will identify 3-5 Zen Centers nationally that have gone through the process of succession through retirement rather than death. Gather information and perspective from these centers, asking what worked and what didn't, and what recommendations they would have for a skillful succession process. Compile results and report to the Board, Dharma Council, and Elders Council.
- By 2014, the Committee will have developed an Abbacy transition plan and submit it to the Board, Dharma Council and Elders Council for review and to the Board for approval. The plan will likely incorporate steps that delineate a gradual transfer of responsibility and authority. For example, the plan may have candidates step in for periods on an interim basis, allowing for more training and guidance. The plan should include points to clarify the process, to describe maintenance of the Succession Committee, to develop and establish support in the membership, and to monitor and evaluate the transition. The plan will include the explicit steps to transition to a new abbot/s.
- By 2015 the Succession Committee will propose abbot nominee/s for Board approval and ratification by the sangha. There are many circumstances that may affect how the Abbots and Succession Committee make decisions. However, there are some qualities the nominee/s should have, based on discussions with the Cohort and Focus groups, and within the Strategic Planning Committee. The goal is to have a nominee/s 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;
 - be 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.
 - Ideally, the nominee/s would be drawn from within the sangha, as this has the greatest likelihood of preserving the continuity of our lineage traditions and temple culture.

- Kyogen and Gyokuko to transition out of Kanin and Godo roles by 2015
- Abbacy transition to be complete by 2020

Leadership

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Recommendations

To enhance clarity and credibility, and broaden and expand offerings.

1. Service Opportunities
 - a. Dharma Council to develop and implement procedures for mentoring instructors of classes, workshops, and outreach situations and supporting and honoring leadership in other roles.
2. Mandala Model
 - a. Mandala Council to hold regular meetings. Consider expansion of council if necessary to deal with meta-issues of temple administration, such as the role of Shuso. Promote involvement in the Mandala Council as an opportunity for Lay Leadership.
 - b. Either expand Outreach Coordinator's position beyond just responding to requests, or add a new position to give attention to broader questions that fall under this team's responsibility.
 - c. Align Mandala Model with changes made in the Strategic Plan.
3. Participation in Broader Community
 - a. Create advertising task group to revisit how Dharma Rain is represented. This group will be made up of members of the advertising and marketing Team, the strategic planning committee, and the website team. The task group should evaluate our marketing and branding efforts, bring them in line with the Strategic Plan, and develop a plan for implementing changes. This plan should be presented to both the Dharma Council and the Board of Directors for approval before any changes take effect.
 - b. In conjunction with the task group to revisit how Dharma Rain is represented in the community at large (a. above), The Dharma Council, the Board of Directors, and all subgroups within our organization that interact with the community at large will remind our members that integrated Zen practice within the community is a way of living that responds with selfless actions to the needs of all living beings with no thought of gain, with no goal, and with no emphasis on affiliation.
4. Lay Practice



Encourage and support the cohort group of transmitted Lay and Ordained teachers in developing mutual respect and harmonious functioning as they enact their collective responsibility for maintaining and transmitting this lineage. This acknowledges that all DRZC transmitted teachers will need to be able to work together for the good of the lineage, no matter how varied and/or physically distant (from DRZC) their manifestations of the teaching role.

Related and Cohort Groups

An overview, analysis of current state, potential future states that were considered, and a summary of sangha feedback on this focal point are available in the full-length version of the strategic plan. This document is a condensed version of the plan and only includes the strategic goals/recommendations that will be pursued.

Recommendations

Increased attention to, and support for, related and cohort groups will support DRZC's mission as well as increase the base of support for DRZC. In all dealings with related and 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.

A) Identify Related and Cohort Groups as an Important Part of DRZC's Mission

Related and cohort groups have received plenty of moral support and encouragement, so this shift is a rather subtle one. What is recommended is to continue the natural evolution from viewing the groups as peripheral to DRZC's mission, to viewing them as integral. This 2010 Strategic Planning process has already helped start this shift. It is more a matter of changing our temple culture than it is about changing the temple structure or function. Some concrete recommendations are:

- 1) **Revision the temple's Mandala diagram;** recruit a small committee of sangha members to think of a better way to represent the related groups in it. One possibility is to pull all of the Councils into the white circle and place the related groups around the outer edge. Committee could be formed and present its suggestion to Board and Dharma Council.
- 2) Ask DRZC teachers with disciples to **recommend coordination of a related or cohort group to appropriate students** as a valuable practice opportunity. This essentially will happen if this Strategic Plan is approved.
- 3) **Raise profile of existing groups** on web site, and add a brief description about how the groups are related to DRZC and what association means. A computer-savvy rep from one of the groups could be recruited to do this. An example can be taken from San Francisco Zen Center's web site, under the prominent Affiliated Groups tab.
- 4) **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 related 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; transportation costs for visiting monks and teachers; reasonable supply of incense and candles; limited printing and copying.

B) Provide Oversight and Guidance for Formation and Coordination of Related & Cohort Groups

- 1) **Request that sangha members work with DRZC when they are considering starting a group or taking over coordination of a group.** This is in recognition that related and cohort groups affect the rest of the temple, and that they will require temple resources in one way or another (even

if that is only volunteer time). It is recommended that the Dharma Council adopt these guidelines or some similar set of guidelines:

- Ask that members considering starting or coordinating a group to present their ideas to the Dharma Council. Unless there are serious concerns or temple resources (such as meeting space) are too limited, the Dharma Council will work with the person to draft an acceptable proposal, facilitating the formation or function of the group.
- Encourage members to wait to start or coordinate a group until they are a disciple of a DRZC teacher, or have practiced regularly at DRZC for at least 7 years (for related groups) or 3 years (for cohort groups); ask that those who do not have a personal teacher to choose one as a mentor in their group coordination role.
- Ask those considering starting a new related group to speak to others who have done so, and to estimate the likelihood that someone else will have to take over the group from them in the near future;
- Distinguish between group facilitators who are transmitted teachers and those who are not. It is recommended to call someone a group's "leader" only if they are a teacher, and use a term like "coordinator" for those who are not formal teachers. It is fine if some authority naturally accrues to an experienced coordinator, but this will avoid misrepresentation of a less experienced person by calling them the leader of a relatively independent spiritual group.

2) **Appoint a Related Group Liaison.** This should probably be a transmitted teacher so s/he can provide some personal oversight regarding teaching content and tone. This person would visit each associated group during one of its regular sessions at least once a year, and preferably twice. S/he would also be the contact person for existing groups as well as people interested in forming a group, facilitate communication between the groups and rest of the temple Mandala, and obtain support for related groups to the extent possible. S/he would work in cooperation (and not interfere with) the Prison Program Administrator. The goal would be to serve the related groups and help them operate in a way compatible with DRZC's mission, not to manage them. Note that San Francisco Zen Center has a similar position (Dharma Group Support, I believe).

C) Encourage and Facilitate Peer Support Among Coordinators and Leaders of Related Groups

The sangha has a growing number of people with experience in starting and coordinating related groups, both within prisons and elsewhere. The experience of being "out on the Dharma frontier" can be very challenging and sometimes lonely, and coordinators and leaders in very different locations and venues often find they have a lot in common. A Related Group Liaison could work with group's coordinators/leaders to encourage and facilitate peer support. The specific timeline and form for this should probably be left up to the interested parties.

D) Clarify the Relationship Between Related Groups and DRZC

1) **Clarify three categories of group – Related, Affiliated and Independent.** This will help both DRZC and the groups better understand their relationship, as well as suggest avenues for

development to various groups. It is recommended that the Dharma Council adopt these or similar terms and definitions, and submit them to the Board for approval:

Related Groups are groups focused on meditation and/or the Buddhadharma, led or coordinated by senior DRZC members at other locations than DRZC. In running related groups, coordinators and leaders agree to abide by the DRZC Ethics Guidelines and to operate in harmony with DRZC's mission. A related group may be a short-lived, informal and fairly secular meditation group held in someone's home and publicized only by word of mouth; it may be a large, formal and public practice group; it may be a branch temple with a DRZC-affiliated Dharma Teacher; and it may be anything in between. Such a group may or may not wish to be connected with DRZC, but for organizational (not necessarily publicity) purposes they will be identified as a related group because they are led/coordinated by a senior DRZC member and will be inevitably be associated with DRZC to some degree in the mind of the public.

Affiliated Groups are Related Groups that want to be publicly identified with DRZC and to maintain a connection to the DRZC sangha and lineage. The Dharma Council should create guidelines for how this connection should be maintained. Once an affiliated group has developed into a permanent separate entity by incorporating, acquiring property or a bank account, or offering fee activities (such as retreats) that are not run by DRZC, the leader/coordinator may be asked to sign a legal Affiliation Agreement with DRZC that specifies the legal and financial relationship between the two groups.

Independent Groups are groups that might appear to the public as a Related Group, but which do not want to be publicly identified with DRZC, or that DRZC does not want to be identified with. Their leader/coordinator, as a member of DRZC, will still be asked to abide by the DRZC Ethics Guidelines and to operate in harmony with DRZC's mission; this does not mean they are obligated to further DRZC's mission, but simply to act in harmony with it (not work against it).

2) **Write Related Group Agreement and Affiliated Group Agreement.** Once definitions have been approved by Board and Dharma Council, create agreements for these different groups to sign with DRZC. These will serve two purposes: first, to clarify the Dharmic and practical relationship between DRZC and a particular group, and second, if necessary, to establish the legal relationship between DRZC and the group. An agreement will only be constructed as a legal document if it is deemed necessary by the Board and its legal counsel.

3) **Have groups sign Related or Affiliated Agreements,** as appropriate.

Related & Affiliated Groups – Strategic Plan Task List

Deadline	Task	Responsible Party/Parties	Closure
April 1, 2011	Appoint/Recruit Related Group Liaison	Dharma Council, with help from Abbots, teachers, Shuso, etc.	Appointment noted in Dharma Council minutes
April 15, 2011	Mandala Image Revision committee recruited	Related Group Liaison	Mandala Image Revision committee forms plan & timeline

Deadline	Task	Responsible Party/Parties	Closure
April 15, 2011	Related groups invited to work on peer support	Related Group Liaison & related groups	All groups contacted, feedback received
May meeting, 2011	Association & Affiliation Defined	Dharma Council	Submit terms & definitions to Board
May 15, 2011	Revision of Temple Mandala Image	Mandala Image Revision committee	Submitted to Board and Dharma Council for approval; approved
June meeting, 2011	Association & Affiliation Definitions Approved	Board	Approve terms & definitions recommended by Dharma Council
July 1, 2011	Association Agreement template completed	Marty Barrack/ Related Group Liaison	Submit template to Board and DC for approval
August 1, 2011	Raise Profile of Existing Related Groups on Website	Webmaster (Genko) plus a web-savvy recruit from one of the groups?	Task gets completed
Board Retreat (August)	Decide on level of material support to offer related groups	Board	In minutes
Sept 30, 2011	Related Groups sign agreements with DRZC	Related Group Liaison & related groups	Report agreements to Board and DC, file them with Secretary
Dec 31, 2011	Create & Adopt Guidelines for Formation & Coordination of Related and Cohort Groups	Dharma Council	In minutes

Staffing and Finances

Staffing

An overview, analysis of current state, potential future states that were considered, and a summary of sangha feedback on this focal point are available in the full-length version of the strategic plan. This document is a condensed version of the plan and only includes the strategic goals/recommendations that will be pursued.

Recommendations

A. Financial Support of Abbot(s) or senior staff.

First, plan for two Abbot salaries, or one Abbot plus a paid senior staff person. The Carlsons as well as many other seniors in the sangha agree that DRZC is of sufficient size and complexity to require two Abbots, or one Abbot plus significant staffing support. This has been discussed but not yet adopted as a plan; it is recommended that we begin planning for and around this scenario.

Adopt Option 2: Increase level of financial support to what would be considered a modest income. The DRZC Board has already identified this as a goal for one Abbot. The full-time presence of an Abbot is beneficial to the sangha spiritually, and also directly increases the income for the sangha in many ways, including through retreat leadership, class teaching, staff time, leadership of the residential program, etc.

Suggestion: Increase gradually over ten years, increasing the second Abbot's/senior staff base salary once the first has reached \$20,000, not including the cost of benefits. Note that benefits include the cost of retirement contributions made on the Carlson's behalf in the coming years, either given to them through payroll or made as an employer contribution. By "base" salary, then, we mean salary exclusive of the retirement contributions, which in the next 5-10 years will be significant for the Carlsons and will make it look as if their base salary has increased to near the goal discussed here. However, the center needs to be budgeting for an increased base salary because the next Abbot/s or senior paid staff will not be receiving anywhere near as large a contribution for retirement (we are trying to catch up for the Carlsons, who have no retirement savings yet at age 61).

The estimated cost of benefits is \$5,000 a year for health insurance. Given our current facilities, the housing provided the Abbots is worth approximately \$500 a month (\$6,000 a year; a private studio apt with a kitchen runs starts at around \$600, locally) and board for an Abbot probably costs about \$800 a year (1/10 of the 2009-2010 total annual cost for the center). That makes the total support package to an Abbot (after the increases) worth about \$31,800.

Increases would never be planned to exceed the annual budget, but goals would help drive the budgeting process. The first salary is already at \$12,000. If this is increased \$4,000 a year for the next two fiscal years (2011-12, 2012-13) it would reach \$20,000. The second salary is already \$3240; if it was increased \$4760 in the 2013-14 fiscal year and then \$4,000 a year thereafter, it would reach \$20,000 in the 2016-17 fiscal year.

B. Adequate Staffing

Combine all three options. (1) Continue as we are, relying on whatever ordained trainees are present and on lay volunteers; (2) Develop a stronger residential community, and (3) Make use of paid help as most efficient and appropriate. Work on these simultaneously. Continue to strengthen our system of involving and supporting lay volunteers. Develop a stronger residential community in our present facilities, and move toward a new facility. Hire help, starting with as few as 8 hours a week or so, after a few years if seems that we are on track with projected donation increases. Suggest visiting this possibility while budgeting for fiscal year 2012-13.

Staffing – Strategic Plan Task List

Deadline	Goal	Responsible Party/Parties	Closure
Adoption of Strategic Plan	Strengthen residency program & pay attention to its affects on staffing pressure	Discussed in the Rigor in Practice chapter of this plan.	Discussed in the Rigor in Practice chapter of this plan.
Sept 1, 2011	Increase Abbot #1 base salary to \$16,000, not inclusive of 403b deferrals or employer contributions ¹	Board	Adoption of 2011-12 Budget
Sept 1, 2012	Increase Abbot #1 base salary to \$20,000, not inclusive of 403b deferrals or employer contributions	Board	Adoption of 2012-13 Budget
Sept 1, 2012	Investigate adding an 8-hour a week staff position if the budget allows (estimated cost \$4,000)	Board	Adoption of 2012-13 Budget; revisit question each budget cycle
Sept 1, 2013	Increase second senior staff base salary to \$8,000	Board	Adoption of 2013-14 Budget
Sept 1, 2014	Increase second senior staff base salary to \$12,000	Board	Adoption of 2014-15 Budget
Sept 1, 2015	Increase second senior staff base salary to \$16,000	Board	Adoption of 2015-16 Budget
Sept 1, 2016	Increase second senior staff base salary to \$20,000	Board	Adoption of 2016-17 Budget

¹ This statement (and similar ones below) applies specifically to the Carlsons because efforts to build retirement savings are separate from efforts to increase salary; for subsequent abbots it may be appropriate for the base salary to include employee deferrals.

Finances

An overview, analysis of current state, potential future states that were considered, and a summary of sangha feedback on this focal point are available in the full-length version of the strategic plan. This document is a condensed version of the plan and only includes the strategic goals/recommendations that will be pursued.

Recommendations

Combine Options 2-6. 2) Ask Members to Increase Annual Giving; 3) Keep Developing the Silent Auction, Extending Base of Support Beyond Members; 4) Encourage Planned Giving; 5) Fundraise Specifically for New Property; 6) Hire a Development Director.

2) Ask Members to Increase Annual Giving.

Approximate increase needed: new donors from \$148 a year (average; this is \$12 a month) to \$295 a year (\$25 a month); retained donors from \$650 a year (\$55 a month) to \$974 a year (\$81 a month). Keep asking, generally and in person.

Introduce the option of a Tithing Membership, where a member would make a 2.5% “tithe” of their gross income. (This percentage was chosen to be reasonable but challenging. The \$81 a month goal for retained donors represents a 2.5% tithe of a \$38,880 annual income; Portland’s median income in 2009 was estimated at \$42,000 for a 1-person household, according to HUD, <http://www.ocpp.org/cgi-bin/display.cgi?page=2009povmedian>.)

Ideally a tithe would be of their gross household income, but if they have a partner who is not a member it may have to be the individual’s income. Special acknowledgements and thank yous would regularly be made to tithing members, as dedicated members who help make the temple available to all and invest in its future. The tithing aspect of it would allow people of all income levels to participate equally. Those who could not (or did not want to) do this could still opt for other levels of membership. Have tithing membership option up and running by Sept 1, 2011.

3) Keep Developing the Silent Auction, Extending Base of Support Beyond Members

This can be done primarily through building a list of regular attendees and by inviting individuals personally. Members have been and will continue doing this, plus the Development Director can be reaching out to people in the community that Dharma Rain touches. Ongoing.

4) Encourage Planned Giving

Another job for the Development Director. Have a template ready, make a pamphlet and put an article in the newsletter about it by Sept 1, 2011. A new Development Director could take this further, approaching people individually.

5) Fundraise Specifically for New Property

6) Use a Development Professional.

This overlaps with the “Make Use of Paid Help” option in the Staffing Focal Point. Starting with as few as 8 hours a week or so, increasing after a few years if it seems that we are on track with projected donation increases. Suggest visiting this possibility while budgeting for fiscal year 2011-12.

7) Monitor Growth in Membership & Donations Relative to Projection of Growth in Membership and Donations from 2010 through 2020

Budget decisions and projections regarding the Strategic plan can be made by comparing yearly budget data with this chart of growth in membership and donations. Before the Board commits to significant expenses, it can see how actual growth compares to the chart. If we are growing more slowly than the projections, caution can be exercised. Several important measurements can be monitored and tracked in addition to total membership and donations (number of new/reactivated donors compared to retained donors, donor retention rate, average annual donations of the different categories of members).

Finances – Strategic Plan Task List

Deadline	Task	Responsible Party/Parties	Closure
July-August 2011	Investigate possibility of using a Development Professional during Budgeting Process	Board of Directors & Assistant Kanin	Adoption of 2011-12 Budget
Sept 1, 2011	Tithing – have description and process worked out, make available to membership	Development Director, Board	Present ideas at annual Board retreat for approval; make available
Sept 1, 2011	Planned Giving – have a template ready, make a pamphlet, and write an article for newsletter	Development Director, Board	Report to Board at Sept 2011 meeting
Subsequent budgeting cycles (August)	1) Monitor growth in membership and donations 2) Investigate possibility of using a Development Professional during Budgeting Process, or increasing hours for one that has been hired.	Board of Directors	Recorded in Board minutes.