

*Dharma Rain*

*Zen Center*

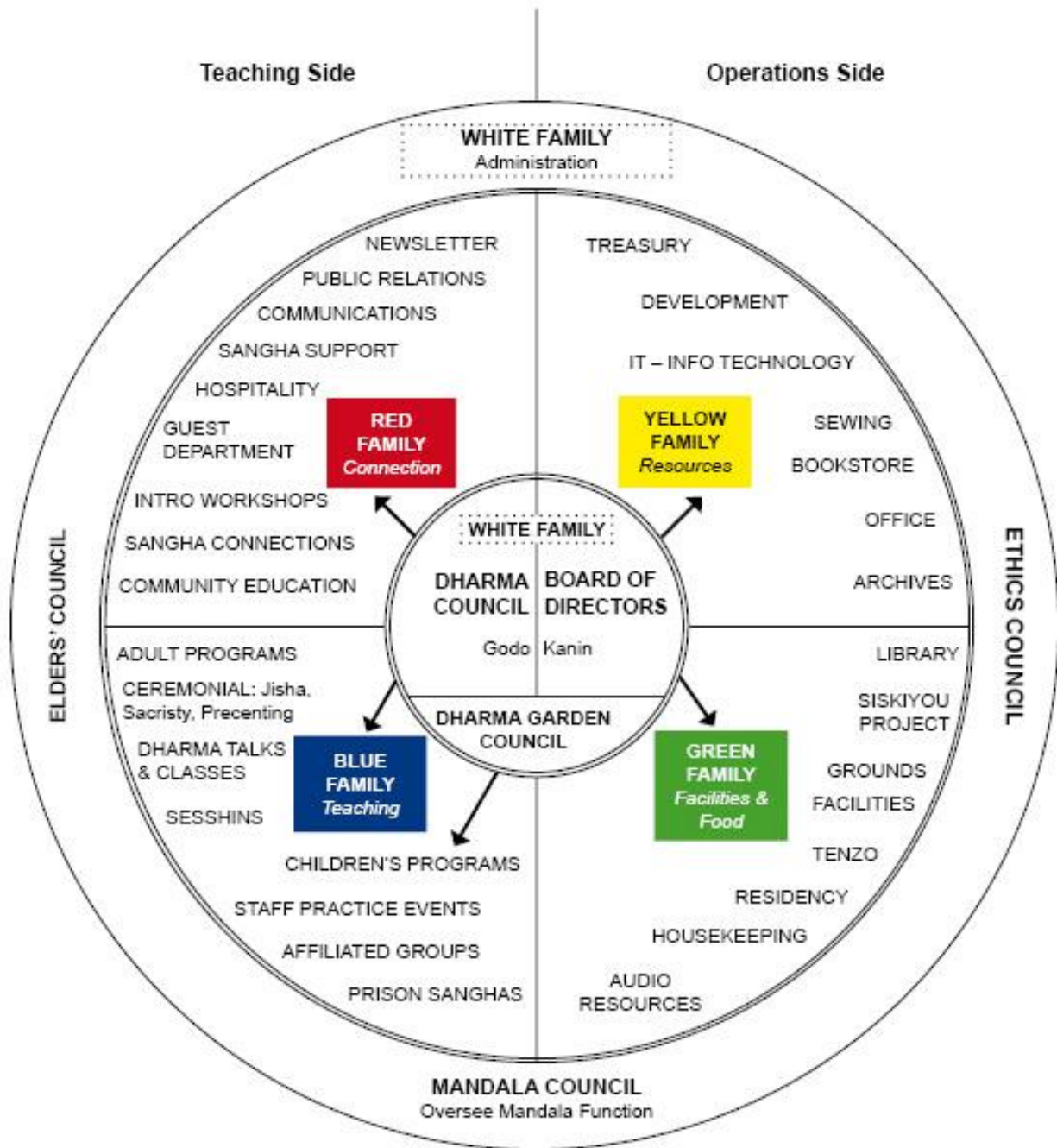
# **Mandala Model Organizational Structure**

Revised 2017

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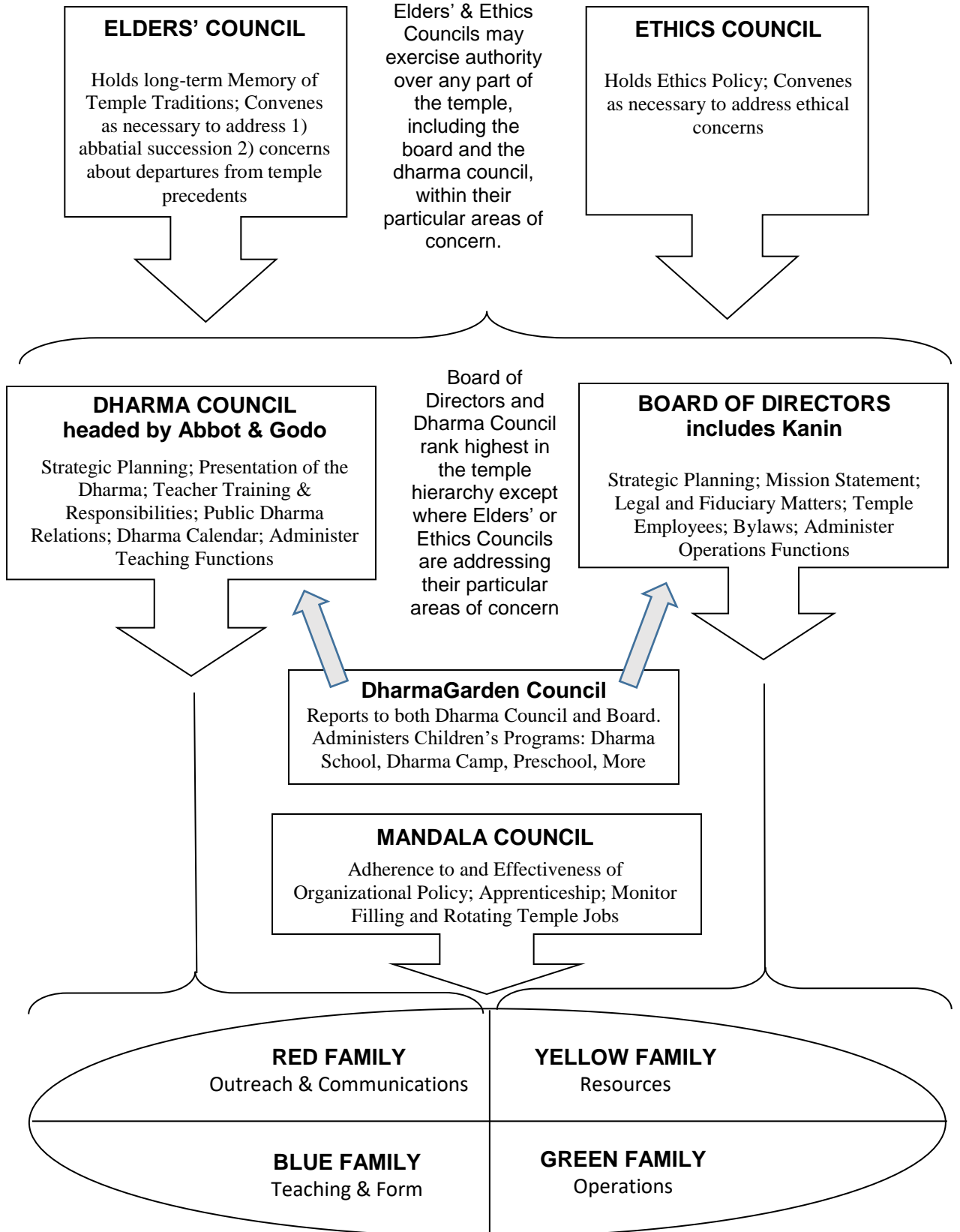
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# DRZC MANDALA OF ORGANIZATIONAL STRUCTURE



Mandala Diagram Revised June 2015

## Relationships and Roles of the White Family Councils



## The Need for Organizational Structure at DRZC

In 2009, the Abbots, Board of Directors and the DRZC shokkis agreed that there was a need for a more conscious and effective structure at the Center. This need largely arose because of the growth and change the temple had undergone in the previous ten years.

A number of objectives for the organizational structure for DRZC emerged in these discussions:

- Clarity with respect to roles, responsibility, and lines of authority and communication;
- Transparency – a relatively simple structure that is understood by the entire sangha;
- Opportunities for Leadership – sufficient authority and autonomy for those with the responsibility to lead or teach, allowing for efficiency, consistency of direction and creative freedom;
- Shared power and responsibility – provide opportunities to all sangha members for meaningful participation, and avoid overburdening a few people;
- Checks and Balances – make everyone accountable, and moderate the power and influence of any single person, group or decision-making body;
- A unified sense of purpose – include and honor every aspect of Zen Center function, and provide connections between functions so no one operates in isolation.

The creators of the Mandala Model included the DRZC Abbots, Kyogen and Gyokuko Carlson, Board Member Jeanna Moyer, and shokkis Sallie Jiko Tisdale and Domyo Burk.

This 2015 revision puts the whole model into one document and incorporates changes that have emerged over the last several years of practicing with the model. An Intercouncil committee (with representatives from the Board, Dharma Council, and Mandala Council) requested proposed updates from each council, including the new Dharma Garden Council, and created the new document, which then went back to the councils to review. After several more times through, it went to the Board and Dharma Council for final approval.

## Choice of the Mandala Model

Our existing structure was modeled on a Japanese monastery: the organization divided into the “East Hall” (Operations) headed by the Kanin, and the “West Hall” (Teaching) headed by the Godo. Much of this East and West Hall structure is retained in the Mandala Model (see Diagram on p3). Also conserved were all of the basic “teams” (formerly known as departments) that exist in the temple, including such things as treasury, newsletter, and guestmaster.

We choose a mandala model because the mandala has functioned well as the basis for organizational policy for Zen Center of Los Angeles. (A *mandala* is a visual representation of a whole composed of many interrelated parts.) A mandala incorporates the idea of interdependence and acknowledges that every part of a complex system is important and has a particular place and role to play. The Mandala of the Five Buddha Families is a traditional Vajrayana mandala in which the composing parts are categorized into five “Buddha Families” (Red, Yellow, Blue, Green and White), each of which has characteristic energies and ways of manifesting.

## **Basic Structure and Function of the Mandala**

### **Teams**

Within the temple, a functional unit with a unified purpose or task is called a “team.” Each team should be of a manageable size (typically between two and seven people) such that a lay volunteer can effectively serve as a Team Leader. (Almost all DRZC teams have evolved gradually into their present composition, size and task.) One person serves as Team Leader for each team and should ideally be given a fair amount of autonomy but also clear instructions about budgets and the kinds of decisions that require approval from above.

### **Families**

Each team belongs to one of five Buddha Families (see Diagram on p3). The teams in a Family manifest some of that Family’s characteristic energy (according to Vajrayana teachings on this subject). Red and Blue Families comprise the “Teaching” side of the Mandala (also known as the “West Hall”). The Red Family deals with outreach and communication and the Blue Family deals with formal teaching and zendo forms. The Yellow and Green Families comprise the “Operations” side of the Mandala (also known as the “East Hall”). The Yellow Family deals with temple resources, and the Green Family deals with day-to-day temple operations. There are many tasks, jobs and positions that could fit under more than one team or family, so teams have to acknowledge overlap and cooperate. Effort was made to balance the number of teams in each Family.

### **White Family Administration**

The White Family deals with oversight and administration. The White Family is made up of Temple Officers [Abbot(s), Godo, Kanin and any assistants, Tanto and Shuso] and the Councils (see Relationships and Roles, p4).

## Definitions of Terms Used in the Mandala

**Associated Groups:** Groups that meet literally or virtually (i.e. online) and have been authorized by the Dharma Council to publicly identify themselves with DRZC, are supported by DRZC, or are Buddhist groups that are organized or led either by a DRZC Associated Teacher or by a DRZC monastic. The Dharma Council keeps the Board of Directors apprised of the status of Associated Groups and Teachers.

**Associated Teachers:** A DRZC member with Dharma Transmission who teaches under the auspices of DRZC.

**Apprenticeship:** The gradual process of Mastering a position or job within the temple under the guidance of seniors who are currently Masters of the position or job.

**Blocking:** During Consensus Process (see below), a member with serious concerns who feels the decision being made may be disastrous for the group can block consensus, thus preventing a decision from being made. Blocking shouldn't be used for concerns about personal consequences. Blocking triggers further discussion and postponement of decision, not Escalation.

**Circle Process:** Known elsewhere as Council Process (called "Circle Process" here to differentiate it from process procedures associated with the White Family Councils). Circle Process is used to explore possibilities, consider differences, reflect on experiences and problems, and to air feelings and reactions. It is not used to make decisions. Each member speaks briefly and spontaneously without cross-talk, either generally or on a specific topic. Circle Process can be used during a difficult Consensus Process to help clarify problems, or simply to allow a group to share with each other.

**Consensus:** General agreement among the members of a group about decisions and procedures.

**Consensus Process:** A process for reaching decisions in a group, in which no action is taken until every member either agrees with the decision or chooses not to block the decision (see Blocking and Standing Aside). Consensus process treats each member's opinion with equal weight, and resulting decisions are considered collaborative rather than compromises; the back-and-forth discussion of differing opinions is expected to move the entire group toward an acceptable decision that is considered best for the group as a whole, rather than reflecting each member's individual preferences.

**Council:** One of the administrative bodies within the White Buddha Family (Board of Directors, Dharma Council, Mandala Council, Elders' Council, Ethics Council, Dharma Garden Council).

**Council Process:** See Circle Process.

**DRZC Disciple (active):** A DRZC Disciple has received lay disciple or monastic ordination from a DRZC Associated Teacher. A disciple is considered *active* if they maintain a teacher-student relationship with a DRZC Associated Teacher and/or if they are active in DRZC functions.

**Dharma Calendar:** The annual liturgical calendar of the temple. Creation of the Dharma Calendar involves the scheduling and coordination of retreats, zazen, services, workshops, classes and special events.

**Dharma Teacher:** A lay or monastic Disciple who has received formal Dharma transmission and authorization to teach from his or her teacher.

**Escalation of Concerns:** Formally bringing concerns, conflicts or impasses to a higher level of the temple hierarchy, and/or initiating a process of review and mediation. Those bringing the concerns forward are responsible for explaining their case.

**Family (Buddha Family):** A group of Teams with tasks that support a similar aspect of temple function. Teams within a Family try to coordinate their efforts and support each other.

**Full Member:** Someone who has taken the Precepts, pays regular dues, and has participated regularly at the temple for at least a year.

**Instructor:** Someone who leads workshops or classes.

**Mandala Model:** The DRZC organizational structure as described in this document.

**Mastery:** Thorough and tested understanding of, and capability to manifest, the practical and Dharmic aspects of a temple position or job. Mastery is determined by the Godo (or Abbot) for Red and Blue Family jobs and positions, and by the Kanin for Yellow and Green Family jobs and positions.

**Mission:** This refers to the Purposes as set forth in the Preamble to the Bylaws and Articles of Incorporation.

**Officers:** *Corporate Officers* (President, Treasurer, Corporate Secretary) are elected by the Board annually. *Board officers* (Chair, Vice-Chair, Board Secretary) are elected by the Board annually. See Bylaws for details. *Temple Officer:* Abbot, Godo, Kanin, Tanto, Tenzo, and Shuso. See “Definitions of Temple Officers” for more details.

**Operations:** Physical and practical functions within the temple, in which people maintain, provide or procure resources, facilities and services in support of spiritual practice. Jobs and positions under temple Operations also provide opportunities for enacting spiritual practice and for implicit Dharma teaching.

**Oversight:** Advisory input over decisions that are primarily the responsibility of other individuals, groups, or departments, and the power to escalate concerns as needed.

**Standing Aside:** During consensus process, the choice of an individual member to express disagreement and not participate in the final decision, without preventing that decision from being made. Done when there is minor disagreement, personal involvement in the results, or there is a reason why the member feels unable to make a good decision (rather than because there are serious concerns for the group as a whole). Standing aside may include stating reservations, withdrawing completely, or simply stating a lack of support. Reasons for Standing Aside should be recorded in meeting minutes.

**Strategic Planning:** A visioning and planning process for guiding the evolution of the organization, or part of the organization, for some specified amount of time into the future (at least 5-10 years and sometimes longer).

**Stewardship:** Full responsibility for decisions and tasks, including visioning, development and implementation.

**Teacher:** See Dharma Teacher.

**Team:** A functional unit with a unified purpose or task. Each team should be of a manageable size (typically between two and seven people) such that a lay volunteer can effectively serve as a Team Leader.

**Team Leader:** Person responsible for both the practical and Dharmic aspects of his/her team. She or he coordinates effective and harmonious functioning of the team, fills and rotates jobs within the team and cooperates with the Mandala Council, Godo and Kanin to ensure appropriate Apprenticeship and function within the team.

**Temple Job List:** The list of all current temple positions and jobs, plus the people who are filling those positions and jobs.



## Definitions of Temple Officers

### Abbot

#### **Executive & Spiritual Director; administrative head of the entire temple**

*Abbot(s) must be ordained and transmitted as a Soto Zen Priest(s).*

As used in this document, the term *Abbot* includes co-abbot(s), if any. The Abbot is an employee of the temple and is therefore subject to regular performance review by the Board of Directors. According to the Bylaws the Abbot is the spiritual director of the organization, determines matters of liturgy and teaching, and gives direction to the membership on these matters. There is no term limit.

The Abbot 1) appoints and supervises the Godo, Kanin and any assistants to these positions, and may fill one or more of the positions him or herself (appointments are subject to review by the Dharma Council); 2) may sit on the Dharma Council, and Dharma Council decisions are subject to review by the Abbot; 3) appoints the temple Shuso(s).

### Kanin

#### **Director of Operations; administrative head of the Operations side of the Mandala Model**

*The Kanin must be a disciple and have practiced at DRZC for at least seven years; exceptions to this rule must be approved by the Elders' Council.*

The Kanin has authority to reverse (after review and consultation) major decisions in the Yellow and Green families, and has supervisory authority over the regular function of these families. The Kanin refers decisions to the Board of Directors where 1) policy is being made, 2) precedents are being set, 3) when the decision involves expenditures over specified amounts of money (set by the Board), and 4) when an issue falls within one of the Board's areas of Stewardship. The Kanin is a voting member of the Board of Directors.

### Godo

#### **Director of Teaching; administrative head of the Teaching side of the Mandala Model**

*The Godo must be a disciple and have practiced at DRZC for at least seven years; exceptions to this rule must be approved by the Elders' Council.*

The Godo has authority to reverse (after review and consultation) the major decisions in the Red and Blue families, and has supervisory authority over the regular function of these families. The Godo refers decisions to the Dharma Council where 1) policy is being made, 2) precedents are being set, and 3) when an issue falls within one of the Dharma Council's areas of Stewardship. The Godo refers decisions to the Board of Directors when the decision involves expenditures over specified amounts of money (set by the Board).

The Godo heads the Dharma Council and Dharma Council decisions are subject to reverse after review and consultation by the Godo. The Godo appoints the Tanto and has no term limit.

## **Tanto**

### **Head of Form; responsible for maintaining standards of temple forms and monitoring the tone and spirit of the training hall**

*The Tanto must be a disciple and have practiced at DRZC for at least seven years; exceptions to this rule must be approved by the Elders' Council.*

The Tanto is appointed by and serves under the authority of the Godo, and has no term limit. When there is any lack of clarity about standard temple form or modification of forms, the Tanto addresses this in consultation with the Godo and others as appropriate.

The Tanto 1) monitors forms in the temple, including dress and behavior in the zendo and Sacristy, Precenting, Jisha and Doshi forms; 2) communicates about standards through the Shuso in the case of the behavior and dress of temple participants, and through the heads of the Sacristy, Precenting and Jisha teams regarding their respective areas; 3) after consultation with the Godo, may respectfully request changes or corrections through the Shuso and Team Leaders; 4) is encouraged to sit on the Dharma Council.

## **Tenzo**

### **Head Cook**

*Must be a temple resident. Appointed by the abbot.*

The Tenzo oversees food production within the temple: the preparation of resident meals and sesshin meals, shopping for food, accepting food donations, storing food, etc. Schedules and supervises assistants. May work with shuso, gardener(s) and housekeeper(s) as needed and appropriate.

## **Shuso**

### **Chief Junior**

*The Shuso must be a disciple and have practiced at DRZC for at least three years; exceptions to this rule must be approved by the Elders' Council.*

The Shuso models the forms and practice of a senior student, serves as a visible “go-to” person for anyone participating at the temple, and takes the point on ensuring that zendo events and retreats run smoothly. The Shuso is appointed by the Abbot and serves a term of up to one year.

The Shuso 1) understands the temple organizational structure and refers people as necessary; 2) politely corrects mistakes in zendo form made by participants at the temple (in consultation with the Tanto when questions arise); 3) is the “voice” in the zendo, making most of the announcements; 4) is present at all regular zendo events and retreats, or arranges for someone to serve in their place, arriving early and monitoring staffing (including doshi, opening, closing, precenting, jisha, guest master), and filling in if necessary; 5) sits on the Mandala Council.

## Board of Directors – Mandate, Responsibilities, Composition, Process & Relationships to Other Councils

*In a limited but very real sense, the Board's mandate is specified by Oregon law.*

The Board is responsible for operating in a way that continues the temple's status as a tax-exempt non-profit organization. This generally means assuring that Dharma Rain's income is used to further its Primary and Secondary Purposes as defined in the Articles of Incorporation and Bylaws.\*

\* The Directors can be held individually and personally liable should DRZC run afoul of the law, be subject to a civil suit, or default on debts. The fact that DRZC's general liability insurance indemnifies Directors does not completely mitigate this risk.

### Board of Directors Responsibilities

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*Board has Stewardship* of the following areas:

#### *Vision*

- Fulfillment of mission statement (as defined in the Articles of Incorporation and Bylaws).
- Strategic planning for future function and evolution of the temple, in cooperation with the Dharma Council. Board pays particular attention to the Operations (Yellow and Green) functions of the temple.

#### *Fiduciary Matters*

- Ensure the financial health of the temple in order to deliver its programs and services, care for its ordained, maintain its facilities and save for its future needs.
- Prepare and adopt an annual budget for all operations and programs of the temple prior to the beginning of each fiscal year.
- Monitor the approved budget by reviewing financial statements, including an income and expense statement and a balance sheet, at least quarterly.
- Review and approve variations from the adopted budget if in excess of \$2000 in any line item in advance of the expenditure.
- Prepare and adopt an annual revenue plan for the temple prior to the beginning of each fiscal year, including both earned and contributed income.
- Participate in and actively promote the fundraising activities of the temple.
- Review and approve any property purchase and/or sale, and all capital improvements.
- Planning for any short and long-term monetary and physical support of the ordained who devote themselves full-time to service to the DRZC Sangha.

#### *Legal Matters*

- All legal matters, including liability.
- Government relations.

*Internal Governance*

- Changes to Bylaws, as determined necessary by the Board, with a 2/3 majority vote.
- Determining levels or categories of membership.
- Determining eligibility of members to vote for Directors.
- Election and oversight of corporate officers (President, Treasurer, Corporate Secretary).
- Establishing committees and councils to assist with fulfilling the temple's mission or assisting with operations and growth. Examples include the Elders Council, Ethics Council, fund-raising committees, Safe Environment Committee, and Emergency Preparedness Team.

*Employees of the Temple*

- Oversee Abbot, including regular performance review. If necessary, initiate and conduct impeachment proceedings against the Abbot as specified in the Bylaws.
- Establish policies and procedures regarding volunteers and employees of the temple. This includes defining terms and conditions of employment, creating and/or approving job descriptions, and determining compensation and benefits.

*Internal Communication*

- Regular communication with the Sangha regarding mission and vision, strategic planning, financial status, policies, and operations.

**Board has Oversight** in the following areas:

- Hiring and termination of employees.
- Major changes to the Mandala Model (changes also require approval from the Dharma Council).
- Yellow & Green Family decisions where policy is being made or precedents are established.
- Decisions in any Buddha Family involving expenditures over a specified amount (see Fiduciary Matters on page 1 for details).
- Decisions in any Buddha Family that raise concerns in one of the Board's areas of Stewardship.

**Composition of Board of Directors**

- The Board consist of 5-12 members, including Directors (elected by general membership); Trustees (appointed by the Abbot); and the Corporate President and Treasurer (ex-officio members). Ex-officio members and Trustees may number no more than 1/3 of the Board.
- Eligibility and terms of service for Directors is specified in the Bylaws, and thus determined by the Board.
- Directors must be Full Members of DRZC.
- Directors may serve for up to two consecutive three-year terms. A Director may serve additional terms after at least one term off the Board. Or they may be appointed as a Trustee.
- The Board nominates candidates for Director vacancies, though nominees may be suggested by any Sangha member (including oneself).
- Directors may not also serve as voting members of the Dharma Council or the Mandala Council.
- Trustees do not have term limits.

## **Board of Directors Process**

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- The Board of Directors operates according to the processes outlined in the Bylaws and as specified by Oregon law.
- A Director involved as a party to a grievance procedure conducted by the Ethics Council or an escalation to the Elders' Council must recuse themselves from any Board decisions relating to the grievance or escalation.

## **Relationship of Board to Other Councils**

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- A majority of the Board can vote to escalate a disagreement to the Elders' Council.
- The Dharma Council escalates concerns to the Elders' Council or the Board of Directors, depending on the issue. Note that the Board does not escalate concerns to the Dharma Council, acknowledging the need to keep the Board fairly independent, and that the Elders' Council should be able to address Dharma issues. In the case of escalation over an operations-type issue, on the other hand, it seems appropriate for the Dharma Council to turn to the Board.
- Except in legal and financial matters, for the most part the Dharma Council functions at the same hierarchical level as the Board. The Board and the Dharma Council will need to be mindful of each other's areas of stewardship, respectful of each other's areas of oversight, and attentive to situations in which consultation and cooperation are called for.
- Although the Dharma Council oversees the Red and Blue families and the Board oversees the Yellow and Green families, family "boundaries" do not apply when the Board or Dharma Council are addressing concerns within their own areas of Stewardship or Oversight.
- The Mandala Council may escalate concerns to the Board (or the Dharma Council, depending on the concern).
- Appeals to decisions of the Ethics Council come to the Board, and the Ethics Council may consult the Board in the case of an internal conflict, concern or impasse.

## Dharma Council – Mandate, Responsibilities, Composition, Process & Relationships to Other Councils

The Dharma Council assists and advises the Abbot and Godo in determining matters of liturgy and teaching, and giving direction to the membership on these matters. It pays attention to strategic planning for the future function and evolution of the temple, in cooperation with the Board of Directors. The Dharma Council pays particular attention to the Teaching (Red and Blue) side of the temple, and to the training of people who could be qualified to serve as temple officers in the future.

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### Dharma Council Mandate

- The Dharma Council works with the Abbot and Godo to ensure that the temple fulfills its Primary and Secondary Purposes, as defined in the Articles of Incorporation and Bylaws, to the best of its ability.
- The Dharma Council assists and advises the Abbot in determining matters of liturgy and teaching, and giving direction to the membership on these matters.
- The Godo facilitates the Dharma Council.

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### Dharma Council Responsibilities

Dharma Council has **Stewardship** of the following areas:

(**Stewardship** is defined as *caring for, monitoring, and cultivating*)

#### *Vision*

- Fulfillment of mission statement (as defined in the Articles of Incorporation and Bylaws).
- Strategic planning for future function and evolution of the temple, in cooperation with the Board of Directors. Dharma Council pays particular attention to the Teaching (Red and Blue) side of the temple, and to the training of people who could be qualified to serve as temple officers, teachers and sangha leaders in the future;

#### *Presentation of the Dharma*

- Content, tone and presentation of Dharma as manifested at DRZC, in Associated Groups and by Associated Teachers;
- Adaptation of content, tone and presentation of Dharma as needed to address emerging needs of the Sangha and greater community; for instance, using skillful means to adapt Dharma vocabulary as appropriate for children and other religious groups;
- Compatibility of temple programs with the Soto Zen tradition;
- Coordination of the Dharma aspects manifested in programs, roles and functions, throughout DRZC, in Associate Groups and by Associated Teachers;
- Maintenance of the Dharma Calendar.
- Track and preserve the written, audio, and video archives of the Temple's Dharma teachings (i.e. *Zen Roots*, Blue Book [*Training at the Zen Center*], Chant Book, *Ethics and Precepts in Sangha Relationships*, *Six Realms*, etc.). Examine, change, and share information and decision-making with the Elders Council.

### *Teacher Training and Responsibilities*

- Training and qualifications of instructors, sitting group facilitators, workshop leaders, and team leaders in the Sangha and in Associated Groups. The Dharma Council establishes criteria used to evaluate candidates for these roles. Specific criteria are necessary but not sufficient. The Leadership Development Team gives information and advice to the Dharma Council about who is qualified to teach at what level. This information is held in confidence. Authority to instruct in various roles follows Dharma Council approval or delegation of approval to appropriate team leaders.
- Assignment of Dharma Teaching responsibilities, including coordination of workshops, introductory retreats, Dharma talks and classes, and team leadership roles.
- Dharma Council may take remedial action, including suspension of instructional responsibility, depending on circumstances and after consultation with other Councils as appropriate. In a case of such concern, the person(s) involved will be invited to present their point of view to the Dharma Council. They will receive a decision in writing, and the Board of Directors will be notified. Appeals can be made to one or more Councils.

### *Public Dharma Relations*

- Care and maintenance of DRZC's public image;
- Official relationships to Associated Groups and Teachers;

### *Internal Communication*

- The membership of the sangha is apprised of the date and agenda of upcoming Dharma Council meetings via multiple communication pathways. Members are invited to bring concerns and items for consideration to the agenda. Meetings are open to the membership except during discussions of personnel issues.
- Regular communication with the Sangha regarding mission and vision, strategic planning, policies, and the status of associated teachers and groups. Such communication should include a summary of business and decisions, new policies, the posting of agendas and meeting times, calendar planning, and the opportunity at each Dharma Council meeting for members to present concerns or participate in discussions.
- Such communication may be delegated to a member serving to facilitate council communications with the sangha.

Dharma Council has **Oversight** in the following areas:

- Major changes to Mandala Model (changes also require approval from the Board of Directors)
- Red and Blue Buddha Family decisions where 1) policy is being made, 2) precedents are being set
- Decisions in any Buddha Family that raise concerns in one of the Dharma Council's areas of Stewardship
- Compatibility of the content, tone and presentation of groups or individuals renting or using DRZC's facilities with Soto Zen and with DRZC's public image

## Composition of Dharma Council

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- 7-9 members; the Abbot may also join the Council. Four positions are appointed by the Abbot: Godo, Tanto, a monastic disciple and a lay disciple. Five positions are elected, and candidates for those positions are selected by a Nominating Committee appointed by the Mandala Council, in consultation with the current Dharma Council.
- Dharma Council members must have practiced at DRZC for at least 7 years.
- Each year in late summer or early fall, the Dharma Council will poll its members to see whether any are planning to step down, and shares numbers and demographics of candidates needed with the Mandala Council. As vacancies arise in elected positions, the Mandala Council will inquire of the DRZC Disciples, via multiple communication pathways, whether any have interest in serving, and/or approach individual Disciples asking them to serve. Nominees may be suggested by any Sangha member (including her or himself) or the Dharma Council; nominees are then subject to election by DRZC Disciples. The Mandala Council verifies the eligibility of candidates.
- Elections: From name(s) submitted, the Dharma Council will draw up a slate of nominees to the elected positions to present to the Disciples to approve or disapprove by line-item vote (yes or no vote required for each candidate). Elections are held before the end of the year, through an electronic election or survey service. Elected candidates must receive a majority of the total votes cast to be approved. If any candidate is rejected, then a new slate will be submitted for a vote. Unanticipated vacancies will be filled by Dharma Council appointment until the next election, and may not include candidates who failed to receive majority approval.
- Members are elected by DRZC Disciples, rather than the general membership, 1) to ensure that those voting are very familiar with candidates, and 2) to ensure that those voting are very familiar with and committed to the Dharma as held in this lineage.
- Dharma Council members are asked to serve a minimum of two years and are expected to attend at least 80% of the scheduled meetings. There are no term limits.
- Composition of the Dharma Council is subject to annual review by the Board of Directors and the Elders' Council. If both the Board and the Elders' Council agree, a Dharma Council member can be asked to end his/her term.
- If possible within the confines of the eligible pool of candidates, one person would ideally hold no more than one voting membership position in the following three Councils: the Board of Directors, the Dharma Council, and the Mandala Council. Members of any of the White Family Councils must be recused if a conflict of interest arises during an Escalation Process due to membership on more than one Council.

## Dharma Council Process

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- A quorum is at least 50% of members.
- The Godo and Abbot have authority to reverse decisions (after review and consultation). If a disagreement persists, a majority of the remaining Dharma Council (not including the Godo and Abbot) can vote to escalate the disagreement to the Elders' Council or the Board of Directors, depending on the issue.
- The Dharma Council operates by Consensus Process.
- Certain exceptions to Consensus are possible, including:



- a. Standing Aside, where one or more members is recorded as abstaining or as casting a dissenting vote, but accepts the majority decision (and may explain their position to the larger membership)
- b. Blocking, where one or more member has such grave concern about a decision that they refuse to accept consensus and discussion continues
- c. Escalation, where a majority of the Dharma Council can vote to escalate the disagreement to the Elders' Council and the Board of Directors

### **Relationship of Dharma Council to Other Councils**

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- The Dharma Council escalates concerns to the Elders' Council or the Board of Directors, depending on the issue. **The Elders' Council addresses Dharma issues. The Board of Directors addresses operations-type issues.**
- Except in legal and financial matters, the Dharma Council functions at the same hierarchical level as the Board. **The Dharma Council is concerned with policy regarding individuals and departments. The Dharma Council recognizes the Mandala Council's authority to manage the working life of the temple.** The Board and the Dharma Council will need to be mindful of each other's areas of stewardship, respectful of each other's areas of oversight, and attentive to situations in which consultation and cooperation would be helpful.
- Although the Dharma Council oversees the Red and Blue families and the Board oversees the Yellow and Green families, family "boundaries" do not apply when the Board or Dharma Council are addressing concerns within their own areas of Stewardship or Oversight.
- The Mandala Council may escalate concerns to the Dharma Council (or the Board, depending on the concern).

## **Mandala Council – Mandate, Responsibilities, Composition, Process & Relationships to Other Councils**

### **Mandala Council Mandate**

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- The Mandala Council, under the guidance and supervision of the Abbots, Board and Dharma Council, helps ensure the harmonious and effective functioning of the temple by filling and rotating temple jobs.
- The Mandala Council coordinates with the office of Shuso, allowing the Shuso to take on whatever Mandala Council responsibilities s/he is willing or able to.

### **Mandala Council Responsibilities**

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- Maintain the Temple Job List
- Work with Leadership Development Team to oversee apprenticeship by having a Mandala Council member on that team
- Be available as a resource for the people functioning in various jobs and roles in the temple with respect to understanding the organizational plan
- Be available to assist Team Leaders in recruiting people for jobs
- Help find appropriate jobs for people who want them
- Each family representative on the Council schedules and facilitates the twice yearly meetings (early fall and midwinter) of the Family Team Leaders

### **Composition of Mandala Council**

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- Five members, plus the current Shuso(s).
- The five non-Shuso members of the Mandala Council serve as family representatives: one monitors the needs and status of the White Family and serves as Chair (see Chair description under Process); one each monitors the needs and status of the temple's Red Family, Blue Family, Green Family and Yellow Family.
- Mandala Council members must be Full Members of DRZC and have practiced at DRZC for at least 3 years.
- The Abbot, Kanin and Godo are non-voting (ex officio) members of the Mandala Council, so are invited to all meetings but not expected to attend. Their advice carries weight and is received with gratitude. At times their presence(s) may be requested by the Mandala Council.
- Mandala Council members are asked to serve a minimum of one year.
- New members of the Mandala Council are recruited by the Mandala Council itself and are then subject to review by the Board and the Dharma Council.
- Members of the Mandala Council are replaced as they resign.

- There are no term limits, but the composition of the Mandala Council is subject to annual review by the Board and Dharma Council. A Mandala Council member can be asked to end his/her term.
- If possible within the confines of the eligible pool of candidates, one person would ideally hold no more than one voting membership position in the following three Councils: the Board of Directors, the Dharma Council, and the Mandala Council. Members of any of the five White Family Councils must be recused if a conflict of interest arises during an Escalation Process due to membership on more than one Council.

### **Mandala Council Process:**

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- Family representative responsibilities do not involve individual authority over the Family or its Team Leaders.
- A sangha member may approach any member of the Mandala Council with a concern or request; the person approached takes responsibility to make sure the concern or request is brought to the Council and someone gets back to the person who originally stated the concern.
- Role of the Shuso: Responsibilities assigned specifically to the Shuso may include being the only Council member empowered to make minor decisions and take action on them without first consulting with the entire Council, although the Mandala Council and shuso will need to come to a mutual understanding about what constitutes a minor decision; being the “voice” of the Mandala Council to the Sangha, communicating Mandala Council requests or decisions to individuals or groups; being the primary “go-to” person for Sangha members with requests or concerns.
- Role of the Chair: The White Family representative serves as the Chair of the Mandala Council. Chair responsibilities include: making sure the Mandala Council fulfills its mandates and responsibilities; scheduling Mandala Council meetings; setting agendas for and facilitating meetings; suggesting changes to Council function and process when necessary; leading the process of selecting new Council members when necessary; making the process of transition from one shuso to another as smooth as possible.
- The Mandala Council operates by Consensus Process, but in the event that consensus cannot be reached there are two options:
- Standing Aside, where one or more members is recorded as abstaining or as casting a dissenting vote, but accepts the majority decision, or
- One or more members escalate the issue to the Board of Directors and/or Dharma Council.

### **Relationship of Mandala Council to Other Councils**

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- Some areas of the temple are overseen by the Dharma Council (such as qualifications and training of workshop leaders) and/or the Board of Directors, so the Mandala Council needs to be aware of this and confer with the Dharma Council and/or Board of Directors about any decisions that are relevant to them. The Mandala Council generally takes the lead in recruiting volunteers even in areas where the Dharma Council and/or Board of Directors maintains oversight.

## **Elders Council – Mandate, Responsibilities, Composition, Process & Relationships to Other Councils**

### **Elders Council Mandate**

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- The Elders Council collectively holds the knowledge and understanding of the customs, practice traditions and core Zen teachings that have been established at Dharma Rain Zen Center (DRZC). This body of knowledge includes the Soto Zen lineage teachings and traditions presented by the temple's founders, Kyogen and Gyokuko Carlson, as well as customs, traditions and teaching approaches that have evolved within, and are supported by, the larger DRZC sangha. It is especially important that the Council provide stability and a thread of continuity during times of change within the temple, and serve as a conservative force if the Council assesses change as occurring too abruptly or too quickly, or if the changes appear to be inconsistent with the vision of the temple's founders. The Council may also serve the temple in times of rigidity as a source of adaptability, emphasizing the creativity and ingenuity of the temple's founders.
- The Council has the primary responsibility to assist and advise the Board of Directors (Board) in finding, recruiting and selecting candidates to fill a vacancy in the abbacy.

### **Elders Council Responsibilities**

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**1. Stewardship** – The Council has stewardship of the following areas:

***A. Continuity and Stability of Vision***

- Holding knowledge and understanding of the customs, practice traditions and core Zen teachings that have been established at DRZC within the collective memory of the Council members.
- Providing stability, a thread of continuity, and a traditional, long-term viewpoint on key issues of organization, function, and succession.

***B. Assistance and Advice in Selecting a New Abbot***

- Assisting and advising the Board in finding, recruiting and selecting candidates to fill a vacancy in the abbacy after an abbot has died, become incapacitated, retired or resigned. (Bylaws Northwest Zen Sangha, Section 7.2)

**2. Oversight** – The Council has oversight in the following areas:

- Providing advisory input to other DRZC councils and to temple officers when requested to do so.
- Providing unsolicited advisory input to other DRZC councils and to temple officers when the Elders Council believes a critical situation has developed that may affect the long-term viability and lineage integrity of the sangha. This unsolicited advisory input would first be offered informally and privately, but, if this first effort cannot resolve the issue, than the Council's position may be made a matter of public record.

- Monitoring the Board's and Dharma Council's adherence to DRZC's mission and to the temple's long-term strategic plan.

### **Composition of Elders Council**

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- The Council shall be composed of between 5 and 11 members.
- Criteria for Council membership shall include active membership in DRZC for at least 10 years, a long-term involvement in and commitment to DRZC events and activities, a maturity of practice, and an understanding of DRZC's lineage traditions.
- The temple's abbots are not eligible for Council membership.
- Once elected to the Council, a member may serve indefinitely. At an annual Council meeting each January, Council members will formally renew their commitment to serve on the Council for the coming year. The Council chairperson will report the Council's membership for each year to the officers of the Board within one week of the January Council meeting. Members of the Council who are not actively participating in Council affairs may be requested to vacate their Council position by a consensus of the majority of the Council.
- If Council membership falls below 5 members, the Council shall select new members to the Council as soon as practicable after a vacancy occurs. Additional Council members up to 11 total members may be added at any time at the Council's discretion.
- When nominating Council candidates, the existing Council will strive to maintain a Council membership that represents all components of the sangha, i.e., ordained monks, lay teachers, lay disciples, and other senior sangha members.
- In the case of a vacant abbacy, any member of the Elders Council, who is actively being considered as a possible candidate for the position of new abbot, would be excused from the process of finding, recruiting, and selecting candidates to fill the vacancy.

### **Elders' Council Process**

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- The Council shall hold scheduled, mandatory meetings twice each year, in January and in September. When a temple situation arises that may require the timely involvement of the Council, any Council member may petition the Council chairperson to convene the Council. The chairperson will contact Council members and set a meeting time and place at his/her discretion.
- The Council shall elect a chairperson who will arrange and chair meetings, distribute communications and represent the Council when coordinating with other DRZC councils and with temple officers. The Council chairperson shall serve a two-year term with the option to renew with the Council's approval.
- The Council will maintain ongoing, informal communications with the temple Abbot. This may be accomplished by occasional, informal meetings between the Abbot and the entire Council, between the Abbot and a delegation representing the Council, and between the Abbot and the Council chairperson.

- If requested by the Board, the Council may present progress and activity reports to the Board or the sangha.

### **Relationship of Elders Council to Other Councils**

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- The Council is an advisory body that is available to other DRZC councils and to temple officers.
- The Council serves as a resource and reference point for the sangha, and its opinions are respected. Therefore, concerns, conflicts and impasses within both the Board and the Dharma Council are escalated to the Council.
- In its oversight capacity, the Council, in rare situations, may find it necessary to “provide unsolicited advisory input to other councils and to temple officers” (see above). The Council does not have direct authority over any other council or temple officer (except within established escalation procedures), but the Council has the option to make its position public (known to the sangha), and thereby use its influence indirectly.

### **Appendix**

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#### **A. Possible Guidelines for Finding and Selecting Candidates for the Abbacy**

If the Abbot’s position were to become vacant without a Board-authorized successor because the previous Abbot suddenly died, became incapacitated, resigned, or otherwise suddenly left the abbacy without a successor, then the Elders Council would immediately meet to plan a course of action to assist and advise the Board in the finding, recruiting and selecting of candidates for the vacant abbacy. This course of action would be finalized when it becomes necessary to do so and it may include the following guideline suggestions.

1. The Council would assist the Board in contacting and consulting with possible outside advisors about the Abbot selection process as necessary. Outside advisors may include other American Zen abbots familiar with our temple and previous abbots, members of American Zen Teachers Association and the Soto Zen Buddhists Association of North America who are familiar with our temple’s style of practice.
2. The Council would assist the Board to prepare a “Notice of Available Position” that would be distributed within the American Zen communities. The Notice would include the following:
  - A description of the Abbot’s role including duties and responsibilities
  - The temple’s compensation statement including the proposed range of salary and description of non-monetary compensations
  - A description of the temple’s candidate selection process including (1) the procedures for candidates’ review, evaluation and hiring; (2) a listing of the Board’s evaluation

- and selection personnel including any outside advisors; and (3) communication procedures for potential candidates during the evaluation process.
- A list of candidate evaluation criteria that will be followed during the selection process.
  - A candidate selection timeline that could include milestone dates for (1) the formal advertising of the vacancy, (2) submittal of applications or statement of interests, (3) review of applications, (4) interviews, (5) internal evaluation period, (6) candidate notification and negotiation, and (7) formal announcement.
3. The Council would initiate and oversee the preparation of an information packet that would be distributed by the Board to all serious potential candidates. This package would include items such as: (1) The Elders Council Statement of Lineage Tradition and Temple Culture; (2) a history of DRZC; (3) a description of membership composition and physical assets; (4) the temple organization model with a description of the duties of temple officers and councils, (5) the latest approved annual financial statement, and (6) other information items as appropriate.
  4. While the abbacy is vacant, the Council would meet and work jointly with the Board and other temple councils to ensure that the temple operations continue to operate normally. During these times of change and uncertainty, the Council would maintain its oversight responsibilities to ensure the stability of the temple's culture and the processes that maintain it.
  5. The Council would assist the Board with communications and presentations to the general sangha, informing the sangha of the candidate selection process and of any decisions reached during the Board evaluation. The Council would also assist the Board with communications to the American Zen community in general, the Portland Buddhist community, and the local public at large.

## **Ethics Council – Mandate, Responsibilities, Composition, Process & Relationships to Other Councils**

### **Ethics Council Mandate**

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The Ethics Council's purpose is to oversee DRZC's "Ethics Complaint and Dispute Resolution Processes." To the extent that informal dispute resolution is not successful, the Ethics Complaint and Dispute Resolution Processes offer formal procedures to address conflict and perceived misconduct of sangha members.

### **Ethics Council Responsibilities**

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*Ethics Council has Stewardship of the following areas:*

- Accept and investigate reports of unresolved disputes, alleged unethical conduct, and allegations of abuse of vulnerable populations. A complaint can be filed by any Sangha member and can name any other member of the Sangha, including an Abbot or Board member, as the focus of the complaint.
- Manage the Ethics Complaint and Dispute Resolution Processes in accordance with formally established policy.
- Maintain and review the Ethics Complaint and Dispute Resolution Processes' procedures at least annually, and make suggestions for revisions to the Board of Directors as necessary.

### **Ethics Council Composition**

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- Three core members and three alternate members.
- Alternates serve whenever a core member is unavailable or has a conflict of interest at the time a grievance is filed.
- Core members and alternates are appointed by the Board of Directors.
- There are no term limits for members, but the Board of Directors conducts an annual review of the Ethics Council.
- The Board of Directors can solicit nominations for new Ethics Council members from the Sangha on an as-needed basis.
- Ethics Council members must be Full Members of DRZC.
- Ideally, people nominated for the Ethics Council have a background in dispute mediation.
- The Ethics Council does not have non-voting members and no one is required to sit on the Ethics Council.



## Ethics Council Process

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- Core members elect a chair.
- Ethics Council meets at least once a year to review the Ethics Complaint and Dispute Resolution Processes.
- The Ethics Council's process consists of four steps: receipt of a complaint, review of the complaint (and decision whether or not to accept the complaint), investigation of the complaint, decision making and preparation of a final report, and follow-up. In some cases, there may be additional steps, including an appeal or reconciliation.
- Decisions can be appealed to the Board or, if there is a conflict of interest with the Board, then an outside panel.
- The Ethics Council operates by consensus process, and can consult with other parties to facilitate the decision-making process. In the event that consensus cannot be reached there are two options:
  - a. Standing Aside, where one or more members is recorded as abstaining or as casting a dissenting vote, but accepts the majority decision, or,
  - b. The Ethics Council can appeal to the Board for guidance and recommendations on achieving resolution.

## Relationship of Ethics Council to Other Councils

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- Because the Ethics Council has an important but limited scope of responsibility that is driven by formal complaints, the Ethics Council will typically not relate to other Councils except to the extent that another Council is a party to a complaint (e.g., as the complainant, the target of the complaint, or as a collateral informant).
- Ethics Council decisions may be appealed to the Board, and the Ethics Council may solicit feedback from the Board when the Ethics Council is unable to arrive at a decision regarding a specific complaint. Similarly, to the extent that there were internal conflicts in the Ethics Council, the Board, in its oversight capacity, could be consulted.
- Ethics Council could provide training, if requested, to other Councils on topics related to dispute mediation that do not involve a formal grievance.
- Members of the Ethics Council may sit on one or more of the other Councils. In addition to creating scheduling conflicts, dual (or multiple) roles of this type can create conflicts of interest that may require these members to recuse themselves from complaint investigations more frequently than will be the case for other Ethics Council members. Relatedly, to the extent that membership on these other Councils entails a philosophical orientation that is incompatible with the quasi-judicial nature of the Ethics Council, Ethics Council members who sit on these other Councils may find it taxing or stressful to render judgments on complaints investigated by the Ethics Council.

## **Dharma Garden Council – Mandate, Responsibilities, Composition, Process & Relationships to Other Councils**

### **Dharma Garden Council Mandate**

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The Dharma Garden Council oversees all programs of the Dharma Garden. These include Dharma School, Dharma Camp, Frog Song Montessori Preschool, Childcare and Parent classes. The primary focus of these programs is to support children and families: their spiritual development, well-being and growth; and to encourage and support young people's inherent Buddha nature through community, compassion, sharing and joy. The Council cultivates these programs to support a vibrant and thriving broader Dharma Rain Sangha by offering to people of all ages a way into dharma and practice.

Dharma Garden seeks to express and cultivate the values of compassion, loving-kindness and connection.

### **Dharma Garden Council Responsibilities**

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**1. Stewardship** – The Council holds stewardship over programs developed to serve the children and families of the Dharma Rain sangha and those who register their children for DRZC programs, including:

- *Sunday Dharma School*: bi-weekly classes for children from pre-school through high school aiming to cultivate and nurture the emotional intelligence, social skills and spiritual growth of children.
- *Childcare*: Trained and supervised childcare for sangha members during some zazen and temple services.
- *Parent/Guardian Support and Education*: structured bi-weekly classes on parenting as Buddhist practice utilizing formal curriculum combined with informal exchange and information. To help families meet and cultivate their spiritual needs the program also provides:
  - zazen talks specifically designed to address concerns of parents and families
  - support to sangha parents in cultivating their own practice within the center and within their families
- *Dharma Camp*: designed for campers ages 9-18 to learn about themselves and to practice interdependence through a combination of traditional summer camp activities and Buddhist practice. The week of camp includes periods that are formal and structured as well as periods that are expressly informal.
- *Frog Song Montessori Preschool*: A comprehensive early learning environment for 3-5 year olds using a Montessori methodology based in lessons in compassion, mindfulness, kindness and environmental stewardship.

**2. Oversight** – The Council appoints and/or selects all staff for programs under its mandate.

- Assures staff compliance with all rules and regulations pertaining to children's well-being and safety including background checks for all individuals under the Dharma Garden Council's mandate, including Council members themselves. In addition works with the board and other councils as appropriate to assure and maintain compliance with fiduciary, ethical and legal requirements.
- Administers, oversees, and facilitates staff development and training for all programs as necessary. Approves all internal program budgets and assures implementation of necessary and appropriate policies for all programs under its mandate.
- Coordinates relationships between staff and teachers in support of dharma expression in curriculum development and practice. Cultivates and supports relationships between families and kids.
- Some form of explicit mentoring from a senior teacher will be available to all Dharma Garden teachers to cultivate dharma practice and understanding. There will be at least one formal check-in per year between Dharma Garden teachers and appointed committee member or a senior teacher.

### **Dharma Garden Council Composition**

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The council is made up of between 5 and 9 members with membership including at least one lay disciple, one transmitted teacher, one dharma school teacher (or former, within the last 5 years), one parent and one student, (or former, both within the last 5 years). Chair will be elected by current committee members and hold the position for no more than two consecutive years. The Dharma Garden Council determines the eligibility of and nominates its own successors, though nominees may be suggested by any Sangha member at any time.

### **Dharma Garden Council Process**

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- The Council will hold regularly scheduled monthly meetings, or at least 10 times per year. Additional meetings may be held as needed at the request of any committee member and discretion of chair. Any concerns may be brought to the committee in writing or person. Minutes will be published online.
- Decisions will be made by consensus. When consensus cannot be achieved, a vote by majority will be taken.
- A pool of candidates for Dharma School teachers and camp counselors will be drawn up by the Council with input from the Dharma Council. Candidates will have been members in good standing for at least 2 years, and have demonstrated maturity of practice in the center. The Dharma Garden Council will make final appointments, Dharma teachers of candidates and/or abbots may be asked for input when a teaching relationship or other leadership position exists or has existed in the last 5 years. Individuals with a criminal history will not be eligible for consideration.
- In the selection process for teachers/camp counselors, extra time and consideration will be given to the candidate selection process to assure candidate's compatibility with Dharma Garden mission, values and vision. Candidates will then be asked to review and

agree to uphold the council's mandate and all policies related to teaching including mandated reporting requirements. Teachers/camp counselors are required to attend all relevant trainings and staff development including those related to these policies. The Dharma Garden council will determine candidates for both counselors and teachers by vote.

### **Relationship of Dharma Garden Council to Other Councils**

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- The Dharma Garden Council reports to the Board of Directors on a yearly basis and consults with the Board of Directors on all matters of budgets, fees, liability issues, and abuse reporting policies and procedures.
- The Dharma Garden Council may enlist the advice and/ or recommendations of other Councils as needed for planning or programming purposes.