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February 2015

This newsletter is intended for teachers, leaders, and practitioners in all Buddhist traditions. While *An Olive Branch* is a project of the Zen Center of Pittsburgh, people from all traditions, other spiritual organizations, and secular groups turn to us for help with governance issues and conflict resolution.

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Webinar Series

So far this year, An Olive Branch has offered two free webinars on the topic of Ethics in American Buddhist Groups. Our third webinar is tentatively set for March 24, 2015. When the presenter on the topic of "Ethical Decision-making: A Process" has confirmed, we will provide a link to register.

Our first webinar (January 27) featured Shinge Sherry Chayat Roshi, Abbot of the Zen Studies Society and the Zen Center of Syracuse. In an interview with Kyoki Roberts, Head Priest at the Zen Center of Pittsburgh and Founder of *An Olive Branch*, Shinge Roshi shared her first-hand experience living through a sangha's pain and confusion caused by misconduct and then leading the re-building of that sangha and its board.



Following the webinar, one of the participants commented, "The discussion around how to ensure transparency and the role of students/practitioners who were board members [was most useful]. I also very much appreciated how candid and honest the discussion was, it's very challenging for organizations to openly face their blind spots, but so essential."

The interview is available [here](#).



The second webinar (February 24) featured Ellis Carter, J.D., LL.M, founder of the Carter Law Group, P.C. Ellis presented on Governing a Spiritual Community: An Attorney's Advice. Participants learned about the top ten keys to nonprofit governance including the board's fiduciary duties, effective oversight, conflict management, and more.

A comment following the webinar was, "I'm a member and treasurer of a small Zen group [in Canada]. Even with the legal differences between our two countries, this topic was timely and relevant. I didn't expect to find policy and governance interesting, but I was riveted."

The presentation is available [here](#).

Rigorous Forgiving

Over the past few years, New York Times Columnist David Brooks has been directing more of his writing toward philosophy rather than the political scene he was inclined to write of earlier in his career. This past month he took a look at 'rigorous forgiving.' [Click here](#) for the article.

As a mediator for more than thirty years, Kyoki Roberts, Founder of *An Olive Branch*, attests to the power of forgiveness in restoring relationships. It is not forgive-and-forget, but rather forgive-and-address. Brooks suggests character evaluation, confession, shame (a positive mental state in Buddhist Abhidharma as it is a recognition of having done harm) and reconciliation are part of addressing the wrong. All parties have a role in the renewal of trust. Without this 'rigorous forgiving,' we are condemned to an unresolved stew of anger and bitterness.



Continuing the Series on Board Governance

In January in this newsletter, we launched a new series on board governance. At *An Olive Branch*, we assert that the incidence and effects of conflict, misconduct, and other dysfunctions in organizations can be reduced when these organizations have a healthy governance system and well-communicated policies. Further, organizations with healthy board governance are generally successful, resilient, and just plain enjoyable for everyone involved.

Last month, the focus was on the board's responsibility for determining the organization's mission, vision, and values. Now we turn our attention to the responsibility to ensure effective planning.

Board Responsibility: Ensure Effective Planning



"Planning" nowadays for most organizations means "strategic planning." Boards must actively participate in an overall planning process, help implement the plan, and monitor goal achievement.

There is no one "right way" for an organization to plan - each organization must determine its own approach, based on its particular needs and life cycle. What is most important is that planning occurs and that the board participates.

According to the *Handbook of Nonprofit Governance*, "The board's responsibilities are to:

- *Insist that comprehensive organizational planning occurs
- *Participate with staff in the planning process

- *Assess the merits of the process and its results
- *Approve the agreed-upon outcomes
- *Use the goals as a guide for budgeting and other priorities
- *Track the plan's implementation and the organization's progress" (pg. 34).

As Yogi Berra said, "You've got to be careful if you don't know where you are going because you might not get there."

Why Have a Plan?

In the final analysis, each organization exists for a REASON (mission, purpose, goal, aim). And the only way an organization can truly accomplish their REASON-for-being is to have a plan that puts limited resources – money, board, volunteers, and staff – to the highest, best, and most focused use.

A great strategic planning process involves key stakeholders in analysis of the current situation and in decision-making about how to employ the limited resources to achieve the organization's purpose/mission.

There are many good reasons to devote energy and time to planning - here are a few:

- * The planning process clarifies the organization's mission and re-focuses it if a change is needed.
- * Planning sets an organization's direction - "Do we go here or do we go there?"
- * The board is better able to govern when it has participated in making choices.
- * Planning provides white space for imagining the future.
- * The plan establishes a framework that guides decision-making about programs, services, and finances.
- * Funders, and some donors, require a strategic plan.



"Progress always involves risk. You can't steal second base and keep your foot on first." Robert Quillen (1887-1948), American journalist and humorist.

Planning is a cycle

Just when you think, "OK, we have a strategic plan. Now we can cross planning off the list of things to do" it's time to remember that the speed of change continues to increase and the planning horizon keeps shrinking. Most organizations adhere to a three-year planning cycle.

And even within the three-year cycle, the board must take responsibility for adjusting the plan's goals and objectives continuously - at least quarterly. The operating environment can change so fast that goals thought important six months ago may need to be modified. And new opportunities may develop quickly and need to be added to the strategic plan.



Think Einstein: it is said that when Albert Einstein was teaching at Princeton, there was a young man in the class who had taken the course the previous year. At the final exam, he looked at the test and said, "These are the same questions you asked last year." Einstein replied, "Yes, but the answers are different."

Question of the Month



Q: Should you expect a board member to donate his/her professional services to the organization?

A: Generally, it is preferable to engage professional services from an outsider. These professional services may include legal, real estate, insurance, technology, marketing, accounting, etc. There is an important distinction between having board members with an array of professional and business skills on the board - which is what you WANT - and actually using them to provide their professional services pro bono or for pay. Using a board member to provide such services more than likely will result in a conflict of interest which will require him/her to abstain from relevant discussions and decision-making - something you DO NOT want.

For an explanation of conflict of interest, please click [here](#).

Please remember, YOU are invited to submit questions related to boards/governance or conflict resolution simply by emailing them to katheryn@an-olive-branch.org. All questions will be answered via individual email; some may be selected for this newsletter - without the asker being identified. If you have a question or board-issue and just want someone to talk it through with confidentially, please call 412-99-OLIVE (412-996-5483) or send email. There is no charge for these conversations.

An Olive Branch strengthens organizations by helping leaders understand the role of conflict in organizational health.

- *To proactively address conflict, we offer dispute resolution training and help organizations design ethical governance procedures.*
- *To respond in the midst of disruptive conflict, we provide processes for healing and restoring harmony.*

An Olive Branch brings the calming influence of a neutral third party, inspired by the tradition of Buddhist teaching that stretches over 2500 years.

[More information](#)

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