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January 2015

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

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Launching a New Series on Board Governance

In December 2014, we concluded a four-part series on safer sanghas. The series focused on strong bylaws (August), clear policies (September), solid grievance procedure (October), and training for teachers and students (December). [Past newsletters are archived here.](#)

This month we begin a new series - this one on the responsibilities of nonprofit boards. Boards of Buddhist nonprofits may face three challenges not found in boards of secular organizations:

1. Role Confusion: Boards of Buddhist nonprofits are usually comprised of students of the sangha's spiritual leader. As students, they are expected to obey the leader's directions for spiritual practice but as board members they must step out of their student relationship with the spiritual leader and into their role as fiduciaries for the organization.
2. Power Imbalance: Another complicating factor for some Buddhist groups is that the spiritual leader is probably the CEO of the organization and may also be the founder - a combination that makes shared leadership a delicate balancing act.

3. Lack of Knowledge: Finally, spiritual leaders who have come to the United States from other nations and cultures to establish temples and teach are generally not familiar with U.S. nonprofit law and the governance of nonprofit organizations in this country.

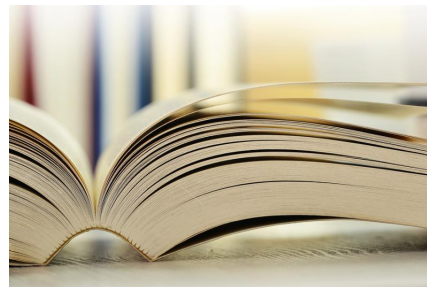
This series on board responsibilities is intended to inform both priests and students with regard to the governance of a nonprofit organization. The newsletter will also continue to include articles that provide information on ethics, conflict resolution, and other topics.

Governance Defined

"Governance" is a word that will be used repeatedly in this series and may not be commonly understood; here is a definition:

"Governance is the board's legal authority to exercise power and authority over an organization on behalf of the community it serves. The board is authorized to establish policies and make decisions that will affect the life and work of the organization. The board is where the proverbial "buck" stops; it is also held accountable for the actions that follow those policies and decisions.

Governance is group action. Individual board members do not govern the organization. Rather, meeting as a group confers governing status to the board as a whole." *The Handbook of Nonprofit Governance*. BoardSource. Jossey-Bass, 2010, page 15.



If your organization is classified by the Internal Revenue Service as a 501.c.3 organization and registered in your state as a nonprofit organization, it is required to have a board of directors. This board has legal authority to exercise power, establish policies, make decisions, and be held accountable for the organization. Governance responsibilities cannot be delegated.

The Board is Responsible for Determining the Organization's Mission, Vision, and Values

The mission statement contains the organization's DNA. It defines the organization's purpose and reason for being. Virtually all nonprofits have mission statements and, increasingly, they have vision statements.



A vision statement specifies direction and the dream for the future. A well-known vision statement is President John F. Kennedy's vision to "put a man on the moon within 10 years."

Some organizations also develop a list of values. Values are the organization's guiding principles.

Together, mission, vision, and values constitute an organization's genetic code from which specific decisions evolve. The board is responsible for creating and sustaining these three basic documents.

The board should keep the mission, vision, and values front-and-center in all deliberations and decisions. Additionally, the board should periodically review the three statements to be sure they are current and valid. Often this review occurs in conjunction with the strategic planning cycle.

How are Mission Statements Used?

Here is a short list of ways organizations use their mission statement in addition to using it in board decision-making:

- * A guide for planning
- * To set priorities among competing demands for limited resources
- * In fund development messaging and grant proposals
- * On brochures, annual reports, and other printed materials
- * On the website
- * In media releases, interviews, and speeches
- * In program development and evaluation.

What are the Ingredients of a Compelling Mission Statement?

The most important ingredient of a mission statement is a description of WHY the organization exists. A mission statement also describes WHAT the organization does but does NOT include a laundry list of programs and services.

Here is an excellent example of combining the WHY and the WHAT in a powerful way. It is from an organization that works with people who have sustained injuries to their hands.

"Next to the human face, hands are our most expressive feature. We talk with them. We work with them. We play with them. We comfort and love with them. An injury to the hand affects a person professionally and personally. At XYZ Organization, we give people back the use of their hands."



Some mission statements also describe WHO the organization serves and a HOW it serves them, but most important are the WHAT and WHY components.

Self-study Questions

Use these questions to guide a discussion on the current state of your organization's mission.

1. Is it short and sharply focused (17 or fewer words)? Would it fit on a t-shirt?
2. Do board members and staff know the mission statement? Is it clear and easily understood?
3. Does it define why you do what you do?
4. Does it provide direction for doing the right things?
5. Does it inspire your passion and commitment?
6. Does it say, in the end, what your organization wants to be remembered for?
7. Have you revisited your mission statement in the last three years?

(From *Ten Basic Responsibilities of Nonprofit Boards: The Companion Workbook*. BoardSource, 2012, p. 5)

Free Webinar Series on Ethics in U.S. Buddhist Groups

An Olive Branch is offering a series of free webinars to increase awareness and adoption of ethics statements. The scope of the term "ethics" includes all aspects of ethical behavior such as student-teacher relationships, handling money, and power dynamics. "Buddhist groups" includes all schools and traditions practicing in the U.S.

Each webinar will be present by a prominent teacher, practitioner, or expert and will be facilitated by An Olive Branch.

The featured presenter on January 27, 2015 is Shinge Sherry Chayat Roshi, Abbot of the Zen Studies Society. Shinge Roshi will share 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.

[Click here](#) to register and for a flyer describing the series.

Ethics Statements and the Precepts

Buddhist communities may resist developing an ethics statement because they believe the Precepts are enough to guide behavior.

Everyone in the community can benefit, however, from concrete examples and interpretations of how the Precepts establish actions within a Buddhist temple, sangha, or group.



For example, in this [document](#), Precepts are stated and then interpreted in the context of Zen Center life.

Question of the Month



With this issue of the newsletter, we are starting a new *Question of the Month* feature. Readers are invited to send their questions related to nonprofit board governance or conflict resolution to katheryn@an-olive-branch.org. All questions will be answered via individual email; some may be selected for the newsletter – without the asker being identified.

Q: What is the ideal size for a board of directors?

A: According to BoardSource, the nation's leading nonprofit organization devoted exclusively to board education and research, the average board size has remained stable since 2004 with a mean between 16 and 17 members. BoardSource emphasizes, however, that each board needs to determine the optimal board size for its organization.

The board needs to be big enough to get the work done and not so large as to be unwieldy or leave board members wondering why they are there. Smaller organizations generally have smaller boards – around 8-10 members while larger organizations tend to have larger boards - around 15-18 members.

Advantages of small boards: greater sense of ownership among members because they know their participation is vital; able to achieve consensus more readily; communication is less complicated; relationships can be more personal; board expenses are more manageable.

Disadvantages of small boards: insufficient diversity of background, experience, and perspectives to address critical issues; possibility of resistance to bringing in new people; and burn out if too few are asked to do too much.

Advantages of large boards: can be more representative of a large, widespread, or diverse constituency.

Disadvantages of large boards: tendency to rely on executive committee which results in rubber-stamp boards and members skipping meetings because they are not part of the inner circle; CEO unable to form personalized relationships with board members; communication can be difficult; and large boards can be expensive, especially when travel to national meetings is required.

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: [here](#).

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