

Choosing Our Future: Wealth, Money, and Financial Structure in Shambhala

About This Report

What follows is not an accounting report, but rather a look at our community's current structural and cultural relationship to money and wealth. It is drawn from an analysis of the international finances, databases, and stories of our Centres, Land Centres, divisions and affiliates (Shambhala Media, Nalanda Translation Group, etc.), and the Centre of the Mandala.

It is also the product of numerous interviews, discussions, and surveys with leaders, teachers, and community members over the past six months on the topic of wealth and finances within Shambhala.

This report was written in response to a request by the Sakyong and the Kalapa Council to answer five questions:

1. What is the current financial health of the mandala?
2. What is the scale of revenue needed?
3. How will the Unified Giving Model enable us to meet that need?
4. What makes this so urgent? What are the consequences of delay?
5. What impact could creating a culture of generosity and wealth throughout our community have on our ability to take Shambhala forward? What would this look like?

The key finding is this: Our entire financial situation – our wealth, our challenges, our wisdom, and our mistakes – all of these are basically good.

This report is not an action plan, but an orientation to help us determine what the correct next steps might be. The Kalapa Council has asked the Executive Director to convene groups to work on these next steps and set forth a plan of action to move us forward.

It is also not a complete vision for the future of the entire organization of Shambhala but rather expresses the earth or practical aspects needed for us to manifest that vision.

In terms of scope, the goal has been to look at the entire mandala world-wide. The discussion of the new implementation of the Unified Giving Model relates to the immediate situation in North America. However, as is mentioned below, Unified Giving is essentially the system that is already in place in Europe and further is an expression of our work to more properly express how Shambhala is a unified, global mandala. The discussion is therefore pertinent to our community across the globe.

If you're reading this I'd like to talk to you. This report is intended to spark conversations on what it means to shift the financial direction of Shambhala at all levels and to usher in a new age of how we relate to wealth and money.

It's said that in Shambhala there's no such thing as individual liberation – liberation is only possible as a whole society. So a transformation in the economic health of Shambhala will happen when we as a community of warriors work with one another to create a society of offering and generosity guided by our faith in basic goodness joined with the Shambhala forms of financial discipline and personal responsibility.

Our situation is completely workable. Together we can manifest true wealth in our world.

Robert Reichner
Kalapa Envoy for Enrichment

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1. Why Wealth Matters

Shambhala has come a long way in the last two decades. We find ourselves at the end of a cycle of pacifying that has brought tremendous healing, strength, and unity to our community. Thanks to the generosity of our Sakyongs and their teachings, we are deepening our understanding and practice while extending further out with social engagement than we ever have. Still, there is further to go.

In many ways, the next frontier for us as a community is to establish a strong foundation in the realms of wealth, power, and money. We hold a vast treasury of teachings on inherent richness and are well-poised to manifest these externally, expressing the success that accompanies embodied windhorse. Now is the time for us to bring these teachings to the earth aspects of economy and finance. In fact, for Shambhala to have more credibility in the larger world, it will be essential for us to demonstrate our ability to relate to wealth, money, and power and express the full scope of the basic goodness of humanity and society, leaving no aspects out.

To do this, we must first achieve financial strength within our own mandala. This has proven a challenge for Shambhala as an organization over its 40 years.¹ There have been ups and downs, great leaps made, obstacles that have arisen, historic accomplishments, mistakes, outpourings of generosity, and financial losses.

These are all expressions of our own inheritance, our karma, both individually and communally. Put more directly, **we find ourselves in a situation that perfectly reflects our community's current merit and virtue. This also means it is perfectly within our power to change it.**

As Paul Farmer, the doctor and humanitarian, has said: "Lives of service require lives of support." In Shambhala, we as practitioners are responsible for both: the service and the support. This means a very new model of livelihood and giving.

Just as we as practitioners can't progress along the path without cultivating merit and virtue, we will not be able to offer the teachings of Shambhala and the view of basic goodness without a financially sustainable model as a stable foundation.

¹ A report on this theme prepared in 2003 remains relevant today, namely that: 1) some basic financial services (such as reporting) are not being delivered; 2) we do not have a viable financial model; 3) entities within the mandala generally act financially independently; 4) there is a broad lack of process; 5) our mandala is carrying significant debt and budgets are tight; and 6) we are real estate rich but cash poor. The full report can be found here: http://www.shambhala.org/programs/congress/Rosen_Finance_Review_Final.pdf.

Many of us express bewilderment, sadness, and sometimes anger at the gap we see between the heaven of the profound and brilliant vision of Shambhala and the instability of its earth situation.

We have the opportunity now to come together as a community, take a big view, and join heaven and earth here; to extend outside our comfort level and look closely at how we relate to money, both personally and as a society; to identify where we are strong and where we are stuck; and to work together to build a base upon which future generations of Shambhala can thrive, grow, and give of the complete richness we have to offer.

We can create a fundamentally new way of working with wealth in our modern world – one that joins the magic of our view, tradition, and practices with the practical reality of money. By including money within sacred view, we can create a culture based on basic goodness that includes wealth and conventional success.

2. What is the Current Financial Health of the Mandala?

Growing, But Financial Health is Not Evenly Distributed

Shambhala is growing financially . Shambhala is an international organization with over 200 Centres and Groups world-wide, more than 9,000 members, and annual global revenues of nearly \$20 million dollar a year. ²

Moreover, with 9,000 members, and adjusted for a diverse community spread across many countries, **we as a collective of individuals wield an estimated gross income of over \$300 million a year. We have significant economic means at our disposal to sway the tide of materialism and the setting sun.**

Shambhala as a whole is therefore not close to bankruptcy or insolvency, but many individual entities experience significant financial and operational challenges. Thus, despite consistent overall financial and membership growth, Shambhala's financial health is not evenly distributed.

Overall, membership and revenues for Centres and Groups has increased and local Centres and Groups represent the core of our growth and strength as a community. We've seen consistent membership growth of 2-4% a year with significant increases of as much as 15% year-over-year in local revenue.

² It's worth mentioning here that our current size as community is an area that invites investigation. We are large for a Western sangha but small when compared to many Christian traditions. One question might be: What type and size of community will be required to effect social transformation at scale in our world?

But the Centre of the Mandala is significantly underfunded – by approximately \$500,000 per year. **This creates a misperception that Shambhala as a whole is financially troubled.** Yet in an organization with nearly \$20 million in revenues, this \$500,000 represents a less than 3% funding gap – a very manageable and solvable shortfall for an organization of our size.

Our Land Centres face financial challenges as well. Shambhala Mountain Center in particular is heavily reliant on significant annual fundraising of over \$500,000 a year to meet the costs of its operations. Combined with fundraising required for Karme Choling, Dorje Denma Ling, and Dechen Choling, this represents a significant ongoing fundraising need that impacts our entire community. We're all familiar with the experience of multiple donation asks from multiple entities. Coordination has improved, but the root causes remain.

Additionally, as our local communities grow in strength, weekthuns and even dathuns are happening regionally, creating a decline in program attendance at our Land Centres.³ While this represents a strengthening of the local Centres and Groups and can mean more people are able to attend longer retreats, it also reduces revenues for Land Centres resulting in further deficit budgets. We'll need to look at the role and placement of regional practice centres as well.

Thus, we have localized areas of financial weakness amidst a larger background of growth and strength.

Shambhala's Financial Situation Not Accurately Perceived

Many in the Shambhala community express concerns about our overall finances. There is a feeling that we are not financially strong despite the greater success of our overall situation as a mandala.

This has three primary causes:

1. Reliance on annual fundraising to cover Centre of the Mandala and Land Centre operations.
2. Decentralized processes, data, and reporting.
3. Not looking at the whole.

Reliance on Annual Fundraising

Shambhala has an outdated structural system of relying on annual fundraising to cover the costs of its Centre of the Mandala operations. Traditionally, Shambhala

³ Though some land centers have seen an increase in bed nights.

Day has been the day set aside for this, however the goal is never met on this day alone.

The result is that fundraising requests come to the community multiple times a year, occasionally with a sense of urgency tied to the message. This creates a perception of need and poverty – and, for some, conveys a sense of lack of planning or proper management by leadership.

A large organization like Shambhala must be based on reliable, recurring revenue rather than seasonal and unpredictable revenue. Without that base, we will be prone to crises and dramatic fluctuations in staffing and services.

Decentralized Data and Reporting

Another factor in the perception of Shambhala's financial challenges is that our financial processes are typically developed locally and the corresponding financial data is spread among 200+ entities all around the world. Some of this is necessary to accommodate regional and international diversity in cultures and legal requirements. Some of it is purely a result of organic, locally-driven growth over time. But the consequence is that pulling together a cohesive picture of Shambhala is extremely challenging. There are three main issues here:

1. **Not all data is collected:** Currently approximately 70-80% of our Centre data is consolidated centrally. This gives a sense of the whole, but not a truly accurate picture.
2. **Data inconsistencies:** Because there is a wide range of financial and technical expertise throughout our mandala, there is a high level of variation in the data integrity of what is reported. Much of this is corrected in the consolidation process, but it adds time and potential for errors. There is also a large variety of accounting procedures and standards required by law across the countries in which Shambhala is present.
3. **Data is not timely:** Financial data is not consolidated until 6-12 months after the close of a period. That means that there is as much as an 18-24 month lag between results and when the results are known in a summarized way. There is no centralized interim reporting on a monthly or quarterly basis.

The result is that perceptions are often based on anecdotal knowledge rather than actual numbers. No one can say with confidence what our current financial picture is since those reports can't be compiled from the incomplete data available to the Centre of the Mandala.

Not Looking at the Whole

Decentralized data and reporting means that, as leaders and community members, we're not easily able to look at the whole of Shambhala and see how the parts fit together. Needless to say, much of this is historical and stems from the success of our Centres in maintaining thriving communities over the last 25 years.

For our leaders, lack of data results in a focus on individual entities in isolation (Centres, Land Centres, or the Centre of the Mandala, depending on one's role). Without a clear sense of how one's own entity fits into the larger picture, decision making is extremely difficult. When challenges in one area arise, there's a feeling that the issue is connected to the larger system, but the cause and solution is not typically clear. Examples of this include coordinating local program scheduling with mandala-wide events, timing of local vs. international fundraising efforts, coordinating how donors are approached by multiple parties from multiple entities, and how new or increased revenues are allocated throughout the mandala.

Additionally, leaders tend only to see what's happening in their own Centre in terms of trends in membership and revenue. For instance, much of the growth of the last few years has been in smaller Centres, rather than in traditionally larger Centres such as Halifax and Boulder.⁴ This means the growth may not be experienced universally across the mandala, influencing how we think of ourselves as a community as a whole.

In terms of our programming, there have not been resources to support taking into consideration the impact of new curricula across entities at multiple levels (Centres, Groups, Land Centres, the Centre of the Mandala, as well as international variation). This means that a programming change that may work well for medium and large Centres may not work for Groups or non-North American Centres and Groups. Or they may have dramatic financial impacts on Land Centres.

More concretely, the Kalapa Council and Kalapa Executive is therefore not able to evaluate timely reports showing financial results of entities across the mandala consolidated in a single view. This directly affects its ability to react to trends across the mandala as they happen.

⁴ Part of this trend is due to individuals at larger centres moving nearby and creating Shambhala Groups, redistributing our existing membership and then growing it in new communities. An example of this would be the Tatamagouche group near Dorje Denma Ling in Nova Scotia.

Over time this means that prioritization, allocation of funds, and overall planning can become very localized in view and scope: the proverbial “left hand doesn’t know what the right hand is doing”. This is experienced as mis-communication or non-communication, but stems from structural and information system issues. Local Centres and Groups reinvest net profits into local activities – which is essential for continued vitality at that level – but greater coordination between local decision-making and a sense of the larger picture could spark further richness.

Summing It Up: Significant Synchronization Issues

Shambhala’s main issue as an organization is therefore one of synchronization. Growth is taking place, but the resources from that growth are not being reinvested into the organization in a way that allows all aspects to thrive.

In many ways, from a business perspective Shambhala is still a startup. We are an organization in search of a repeatable and scalable business model.

The opportunity to create a financially healthy organization exists, but it will require major structural changes to address the significant synchronization issues that exist. Achieving this will be key to establishing our credibility as an organization with a unique vision to offer to the world. Working together as leaders and a community, we can establish Shambhala as a model of wealth in our world.

3. Issues in Our Current Funding Structure

Root Causes

First, let’s look at **why we encounter difficulties in our current funding model.** There are three primary factors:

- People’s connections are to their local Centres and Groups.
- Donating to a central administration is not inspiring.
- Our local and central organizations are not synchronized.

People’s connections are to their local situation

People enter our mandala almost exclusively through our local Centres and Groups. This is where they feel their community is, and this is where they feel their connection. The natural place to focus donations is at the local level.

Donating to a central administration is not inspiring

We know that fundraising can be extremely effective when oriented around an inspiring capital project. The Great Stupa of Dharmakaya remains one of our community's greatest successes. How a centralized administration works and what its needs are is not inspiring in the same way. Further, it requires explaining these workings again and again every time someone new enters our community. No organization does this. Fundraising, even when done for operations, focuses on the goals, programs, and work of an organization as a whole, not on its administrative infrastructure.

Our local and central structures are not synchronized

This is the key point. We do not currently have a system that strengthens the Centre of the Mandala to support success at the local level. This is the essential problem that needs to be solved for Shambhala to thrive organizationally.

So, where does this lead?

4. Where Our Current Model Leads

Our current model means more of the same: an underfunded organization that does not live up to its own vision.

Currently, what this looks like is:

- Projecting a sense not of richness but of constant need: We send multiple fundraising requests year round just to fund our operations.
- Not caring for our staff – indeed, our friends – in Shambhala: We currently greatly overwork the staff at the Centre of the Mandala, requiring long hours and work during evenings and weekends with little or no vacation or retreat time and no pension.
- Not allowing leaders to take their seats: Leaders spend too much of their time attending to fundraising or financial crises rather than focusing on manifesting our vision.
- Not allowing our people to be successful: Meeting the basic needs of the mandala with staffing at this level is not possible.
- Not paying our people a living wage: Our current staff – Acharya Lobel, Carolyn Mandelker, David Brown, and many dedicated others – is living with a 13% cut to their already very humble pay. None of us would consider this acceptable in a corporate setting.

- Relying on a volunteer President and CFO: This is completely unsustainable and does not express the dignity of Shambhala.
- Not filling necessary positions due to lack of funds: Shambhala has no Director of Practice and Education, Director of Development, or Director of Human Resources.
- Not keeping pace with technology which results in numerous lost opportunities to connect with interested individuals.

All of this prompts fundamental and justified questions of integrity. How can we be working towards enlightened society while we're unable to express it in our own organization?

We can choose this path, but it will mean we do not realize our vision.

Clearly this is not a way forward.

5. What is Needed?

To put Shambhala as a whole on a solid footing, funding is needed at three levels:

1. Centre of the Mandala
2. Land Centres
3. Regional Support (or similar mid-level structure)

Centre of the Mandala

The Centre of the Mandala is financed primary through one time and monthly individual donations, Centre/Group and Land Centre transfers, and International Sponsored Programs.

As an example, the Centre of the Mandala revenue for 2011 is as follows:

Donations - Recurring	411,920
Donations - One Time	666,411
Centre and Group Transfers	211,719
Practice Centre Transfers	126,000
International Sponsored Programs	163,723
Total	\$1,579,773

But over that same period expenses totaled \$1,703,060 for a loss of \$123,287.⁵

Thus, in a year when Centre and Group revenue increased \$657,260, the Centre of the Mandala ran a deficit budget.

We can see that things are not connected properly.

Land Centres

Our Land Centres are currently treated similar to our local Centres/Groups. They run largely autonomously, but in fact are a shared resource for our entire mandala. International program scheduling is coordinated, but each Land Centre is responsible for balancing its own budget, despite the fact that their revenues are largely a function of the international programming of our community as a whole. However, we have more capacity at our Land Centres (in terms of bednights, for example) than our current community needs. This means an additional means of support is needed.

Seen from a larger viewpoint, our Land Centres are shared resources for our community – precious jewels that provide containers for the Sakyong’s most generous teachings and allow for a deepening of practice that enriches all of us so we can engage our world at home in a more profound way. Our Land Centres in fact feed our city Centres and Groups throughout the year. We must therefore find a more reliable means of support to preserve these incredibly valuable institutions.

For our Land Centres to thrive in the near term, they will require support at a greater scale than is currently possible from one-time and recurring donations based on individual inspiration. Additionally, more strategic planning around the development of our Land Centres will be needed as we grow into our existing capacity so we can make them increasingly self-sustaining for the long-term.

Regionalization (or other mid-level structure)

As a global mandala with more than 200 Centres and Groups and people attending our programs from dozens of countries, we have grown beyond the size where a single central source of coordination is possible. In reality, the staff known as the “Centre of the Mandala” represents two entities: 1) the Sakyong and Sakyong support staff (this is the heart centre of our mandala) and 2) central services for the international community. And those few areas which have relatively small regional structures. The result is that just two staff members at the Centre of the Mandala must relate directly to over 100 Centre Directors and Group leaders. This is 5-10

⁵ See report here: http://www.shambhala.org/members/files/pdf/2011_EOY.pdf.

times what is workable for any manager and is experienced as a significant communication gap for those 100+ Centre Directors and Group leaders.⁶

The importance of regional support structures was recognized as early as the Second Shambhala Congress. We have a small number of them: Atlantic Provinces, Southern Central/Texas, Northern California, Rocky Mountain Shambhala Region, Florida, Australia/New Zealand, and Europe. Efforts have been made to develop greater regionalization in the Pacific Northwest and elsewhere. The Kasung have also been very successful in organizing regionally.

Regionalization allows inspiration to come from the distinctive style, culture, and language of the specific area. It is a way of fostering geographic creativity and blending local cultures with the unique elements of Shambhala culture. This in turn makes Shambhala feel more welcoming and integrated into the local society.

Shambhala Europe provides a good model for regionalization.⁷ There, Centres within the region contribute to a central office that assists in coordinating regional activity and connecting to the Centre of the Mandala and the system has been in place for 20 years. However, this is only possible thanks to the financial support of the Centres/Groups that provide funding for a regionalization (in some cases this is in the range of 15-25%, though it varies by Centre and country). Still, even in Shambhala Europe financial challenges exist and increased transfers will be necessary in the future to achieve greater stability.

For Shambhala to function as a true global community, we will need to account for funding regionalization and/or some other mid-level structures in the future. This might be as simple as a single individual overseeing 10-20 Centres/Groups, or, we may have multiple people dealing with specific kinds of support that is less regionally based. Many details need to be worked out in terms of how this mid-level coordination might look. Still, a financial placeholder is needed for it in our financial model as it will go a very long way towards improving communication and coordination throughout our mandala.⁸

⁶ This organizational and reporting structure could be further clarified at some point since currently Centre Directors are appointed by the Sakyong, relate to the President, and also relate to Shambhala's Executive Director and the Director of Centre and Group Support.

⁷ Shambhala Europe as an entity may in fact be too large to accommodate the diversity of Europe, culturally and linguistically. Shambhala Nederland provides another strong model at the country level.

⁸ Obstacles to regionalization will also need to be dealt with, including geographic distances between Centres/Groups in regions, resource issues of time and money arising from relating to other Centres/Groups, and not yet having an ethos, culture, or tradition of collaborative working.

What's Needed

Long-term, Shambhala as an international organization needs total annual funding at the following levels:

Centre of the Mandala	\$2.5M
Land Centres ⁹	\$1.5M
Mid-level Support	\$1M
Total	<hr/> \$5M

These funds would:

- Allow appropriate staffing in the **Centre of the Mandala** to provide:
 - Coordination of a unified mandala
 - Curriculum development¹⁰
 - Marketing support
 - Collecting and disseminating best practices to Centres and Groups
 - Programs for growing our mandala
 - Proper IT infrastructure
 - Stronger reporting and data sharing
- Support for the ongoing operational budget gaps at our **Land Centres**, along with increased needed maintenance.
- Create the means for establishing small, but highly functional **Regional Support**.

Realistically, Shambhala will not be able to leap out of its current identity as a network of loosely affiliated, volunteer-run groups without this level of support.

⁹ Bolstering the resources of the Centre of the Mandala will be the first step with Land Centre and Regional support following as a later phase.

¹⁰ We've seen that curriculum development is one of the strongest drivers of revenue at the Centre level. For instance, since the introduction of the Way of Shambhala curriculum, local Shambhala Centre and Group program revenue has increased by over \$650,000 annually since 2009 — a jump of over 33% in revenue. The actual increase was in fact even greater as Way of Shambhala also replaced the revenue many larger Centres had come to rely on from visiting teachers and Rinpoches in other lineages. These kinds of dramatic, community-wide effects require strong centralized staff. See for details: <http://funding.shambhalatimes.org/files/2012/12/ShambhalaCentreofMandalaResourcesOverview-Updated1March2013.pdf>

Seeing the issues with our current system and realizing the depth of change needed, leaders across the mandala have been discussing possible solutions for years. This investigation of our situation and what is needed has led to the development of the Unified Giving Model.

6. What Does the Unified Giving Model Offer?

The purpose of the Unified Giving Model is not only to solve the financial issues of the Centre of the Mandala.

The purpose of the Unified Giving Model is to establish a financial structure that helps our mandala function as a coordinated, integrated, unified whole.

More precisely, the purpose of the Unified Giving Model is to:

1. **Walk Our Talk:** We ourselves need to be a working model of enlightened society – complete with a sustainable financial model – if we want to take these teachings out to others.
2. **Aggregate Virtue:** We'll do this by:
 - a. Allowing each Centre and Group to directly contribute to the support of the Sakyong as a part of the Centre of the Mandala budget;
 - b. Creating a system that allows our community to work together towards shared goals as a cohesive mandala;
 - c. Fostering a culture of generosity, offering, and wealth.

Sakyong Support

One of the benefits of Unified Giving is connecting each Centre and Group more directly to the Sakyong's support. For some, the Sakyong's support brings up questions so it's useful to look at the picture in detail.

In 2011 (the most recent closed financial year), the Sakyong's support totaled \$701,174 or 3.7% of the mandala's overall annual turnover of \$19 million. \$121,843 was direct support for the Sakyong and Sakyong Wangmo along with their parsonage allowance. \$205,312 was salaries for the Sakyong's staff including the secretary, editors, travel coordinator, and kusung. \$160,714 went to travel, household, and communications for that staff, and for Rinpoche himself. \$22,000 was support for the Sakyong's mother, Lady Konchok, and her husband Lama

Pegyal. The remaining \$191,305 were court-related expenses including the mortgage, utilities, taxes, insurance, and maintenance. ¹¹

These are the expenditures that make it possible for the Sakyong to teach, travel, write, and engage leaders around the world. And tying our Centres and Groups directly to his activity will have wide-ranging benefits for our mandala.

Creating a System of Organizational Feedback

In many ways, Shambhala as an organization is like a body without a nervous system. **The synchronization issues currently seen throughout the mandala are a function of a system that does not provide feedback.** When growth in one area occurs, corresponding growth should occur in other areas. Likewise, if one area is experiencing difficulty, other areas can come together to support it.

Of course, there is a nervous system in Shambhala, and we have many people dedicated to making that function in roles ranging from MIs to Dapöns, to Centre Directors. But, at the same time, there is a cultural reluctance to becoming “too organized”. That attitude, while understandable, also has consequences, which reflect themselves in many of the issues raised in this report.

To give a specific example of what’s needed, the Centre of the Mandala’s funding must be tied to the success of the Centres and Groups that it supports. Only then can we create a feedback system that focuses all our energies in the same direction. Growth in our Centres feeds growth in the Centre of the Mandala which feeds growth in our Centres. We thereby create a positive feedback loop.

7. How Do We Get There?¹²

Looking at UGM Long-Term

From a long term perspective, a healthy mandala will require a transfer of 25% of Centre and Group revenue to fund the Centre of the Mandala, our Land Centres, and Regionalization.

¹¹ The full report can be found here:

<http://www.shambhala.org/members/files/pdf/2011%20EOY.pdf>.

¹² An essential additional piece will be bequests in coming years as generational transfers of wealth take place. Planning to properly welcome and accommodate these offerings is needed now at all levels within our mandala.

25% is a standard percentage for central services or overhead in non-profits. Still this represents a significant jump from where we currently are. So how can we do this?

Our Centre and Group revenue, combined with individual recurring and one-time direct donations to the Centre of the Mandala, total just under \$10 million. **To reach a funding goal of \$5 million dollars with a 25% centre transfer as described above, we'll need to grow our membership and program revenues at the Centre and Group level to \$20 million in the coming years.** This is a doubling of our Centre and Group revenue. This will require an additional \$10 million of revenue at the Centre level and means significant changes in how we view membership and programs.

Funding Necessary for Centre of the Mandala, Land Centres, and Regional Support	\$5M
Transfer Percentage	25%
Revenue Required at Centre and Group Level	\$20M
Current Centre and Group Revenue ¹³	\$10M
New Centre and Group Revenue Needed	<hr/> \$10M

There are many approaches to doing this, but at the simplest level it means:

- Increasing our member base from 9,200 to 20,000 by 2020.
- Increasing our average membership donation two or three times what it currently is (\$28/month in North America, for example).
- Working to implement best practices in our programs.

This is not an outrageous prospect – indeed, some would say these are humble goals. Let's look at each part.

Membership

Increasing our average membership donations by two or three times may sound challenging. However, this does not mean that each person in Shambhala would

¹³ Includes individual annual and recurring direct donations to the Centre of the Mandala. The precise mechanics of this flow of funds is being worked out by the Unified Giving Model team.

increase their contributions in this way. Indeed, for many, this would be impossible. Rather, this means that those who are able would offer more to support the vision of the organization – based on their inspiration and ability.

The reality is that our members in Shambhala are eager to help. In the Dana Groups survey a few years ago, a third of our community said that they could give more than they currently do. And 5% said they could give a lot more. So we simply need to open the doors to the giving that is waiting to happen.

In Seattle, for instance, the Centre leadership launched a focused membership drive among existing members and were able to increase monthly giving by 65% in just 3 months. LA and Vancouver have also generated significant growth in their member giving. A focused membership drive across the mandala would have a dramatic effect.

In terms of aggregating virtue, the key here is tying our path as practitioners to our livelihood. Centres around the mandala are experimenting with members offering a percentage of their income – 3%, 5%, and in some cases 10%. While not an option for everyone financially, many community members are ready to offer in this way and are simply looking for the opportunity to give at a new level.

As Shambhala grows, giving from those of the greatest means will be important for us in developing financial strength. For instance, **in this kind of a model, one-third of the community – those with more wealth and resources to offer – is able to provide two-thirds of the support by linking their generosity to their livelihood. This has wide-reaching, profound effects on the realization of the overall vision.** So part of this is a question of inviting and welcoming the wealth that is already there.

The same kinds of opportunities exist among those looking to become part of Shambhala. Most Centres report that people have a hard time knowing how to become members. Simply attending to existing interest would create an immediate and tangible change in our community.

So how does a membership goal of 20,000 relate to the 12 million figure referred to by the Sakyong? The Sakyong has said that this number is not about bringing 12 million people into Shambhala but about reaching 12 million people with Shambhala vision. *The Shambhala Principle* has been offered as a means of doing that. And the creation of affinity circles represents further steps that will enable us to inspire ourselves and begin dialogue and partnerships outside of Shambhala.

Programs

We have a treasure trove of data on program attendance patterns thanks to the Shambhala Database. Preliminary analysis has been done, confirming the drop offs

many of us note in program attendance after the first one or two weekends or classes. Why is this? What brings people back? Why do people not continue? For the most part, we don't know the answers to these questions. But we could by simply asking these questions of those who have attended.

A focus on our curriculum and its impact on the finances of our Centres, Groups, and Land Centres will be essential to developing stronger programming going forward. Further work is also needed on how our programs can more fully support our teachers financially.

With focused effort and the harvest of best practices both within our community and beyond, we can radically change how our programs connect people and bring them back.

Vast Possibilities

All this is to say that with just a small amount of effort, we could radically transform our financial situation. Doubling members, doubling or tripling membership donations, and doubling our program attendance would establish Shambhala as a powerful force in the world, poised to welcome many more in the work of transforming society.

A leap to \$20 million in revenue with \$5 million of funding for central resources won't happen in one step. But it's by no means out of reach and could be achieved in just a few years with all of us across the mandala exerting a focused effort.

8. What Makes This So Urgent?

Shambhala is at a turning point. The Sakyong is reaching new audiences. Mindfulness is a household word.

The transformative changes in membership and programs described above can not happen through scattered and diffuse efforts here and there. They require leadership that brings together all involved parties. This is the purpose of the Centre of the Mandala. But it is underfunded and underfocused.

For us to move to a new level of engagement with society, we need to resolve our synchronization issues. We must create a situation that directs the efforts of the Centre of the Mandala to the most direct impact possible for our local Centres and Groups. And we must strengthen the Centre of the Mandala and work on regionalization to do that in the ways that are most helpful to our individual Centres and Groups.

If we don't make a change now, we will continue as a small community with big ideas that fails to have the impact we could on a world that desperately needs help.

The Unified Giving Model is essentially identical to the traditional Tibetan technique for developing generosity: the easiest way to start is to take a coin from the right hand and pass it to the left hand. In doing so, we can begin a flow of merit that will radically change our current situation. We can plant seeds for future generations to benefit millions and establish a good human society on earth.

9. Where Unified Giving Leads

With Unified Giving successfully implemented, we have these seeds for that radically different future.

What this would look like:

- True synchronization: Growth in our Centres and Groups would result in growth in the Centre of the Mandala.
- Inviting the Lha: Centres and Groups would directly support the activity of the Sakyong.
- Thinking and acting as a mandala: There would be a tangible feeling that we were a single, unified community working towards a shared vision.
- Alignment: The Centre of the Mandala's services, goals, and results would correspond to those of the Centres and Groups it serves – and its funding would reflect that.
- Caring for our people: We could create manageable workloads for our staff, offer them a good livelihood, allow them to maintain a practice to enrich their service, and generally express Shambhala vision in the realm of work.
- Caring for all our entities: We would have sufficient resources to support our Land Centres and the many entities that make up Shambhala such as the Nalanda Translation Committee, the Shambhala Archives, Shambhala Media, and many more.
- Expressing lungta: Our people would feel successful and that energy would flow from our Centres and Groups to the Centre of the Mandala to our Land Centres and ultimately to all the individuals we touch.
- Increasing services: Over time, additional services in the areas of curriculum, marketing and advertising, IT, training, best practice sharing, teacher support and more would be funded and available.
- Projecting richness: Shambhala would stand as an example of the flow of generosity towards a vision to benefit millions of people.

We have as a community \$300 million dollars a year at our disposal. With such wealth, where and how will we choose to direct it?

10. Conclusion: A Necessary Step

At the beginning of this report, Shambhala was said to be financially strong. This is true. However, it doesn't mean that we are currently set up to realize our vision of social transformation. For us to move forward on that path, we need to make fundamental changes to how we think about ourselves and how we provide the means for that vision.

Unified Giving is not a full fix but a necessary step. To make the greater leap required, we'll need to transform our revenue model as well and think deeply about how we as an organization want to manifest and engage the world.

Ultimately, the Unified Giving Model is one piece in a larger shift of heart and mind: a shift of dissolving the boundaries both within our mandala and between our mandala and the greater world. The first step is for us to want to do this. It is an invitation to express the wealth of our tradition, to let generosity flow, and to unleash the windhorse and success that is our potential.