



Unified Giving Model
Recommendations to the Kalapa Council
April 2, 2013

1. View

Over time, the Unified Giving Team has come to appreciate that the shift we are seeking is not only a financial one, but also a shift in view. We aim to develop a far more integrated understanding of what it means to be a mandala or a global community--that the entities within the mandala are interdependent with one another, and that growth of the whole and the parts can only happen if the parts are mutually supportive of one another.

This campaign will change the relationships between individuals, their local centres and the centre of the mandala. The campaign will change:

1. How we understand the interconnectedness within the mandala. This will change how we describe Shambhala to people-- newcomers, program participants and all our supporters. Shambhala will be described as a global community based on the principal of a mandala.
2. How we think about and describe our local Shambhala communities.
3. How we fund Shambhala.

The financial aspect of the project will apply to North American centres exclusively, as Europe already has a unified giving model that supports Shambhala Europe and the centre of the mandala. The other aspects of the campaign--the exploration of what it means to be part of a global mandala, of our membership practices, and of our business model--will include the rest of the mandala beyond North America. As other regions develop more fully outside of North America and Europe, we will have the infrastructure in place to work with them in a unified way.

2. Report on overall financial health of the mandala and urgency of implementing Unified Giving

In order to provide the Shambhala Community with a clear assessment of the overall financial health of the mandala and convey the need for and role of a unified funding approach, the Kalapa Envoy for Enrichment, Mr. Robert Reichner, has been asked to draw up a report to be used for that purpose. This report will convey the magnitude of the leap -- at both a personal level and a community level -- necessary across our mandala for us to move forward. It will also serve as an opportunity to start a community-wide dialogue around creating a culture of generosity and wealth, along with why this is necessary for us to realize our vision.

His report addresses the following 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. Is this 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 might this look like?

3. Teams working on key aspects of Unified Giving

In parallel with the preparation of the financial report, we are in the process of creating 5 teams, each focused on an aspect of the campaign.

Overall leadership and integration of these teams is the responsibility of the Executive Director.

Each team has a leader. The team leaders are in the process of setting up working groups made up of leaders from our community and others skilled in the topic area. Consultation with individuals from the relevant entities of the mandala will be an integral part of the process.

Each team leader is tasked with designing a specific engagement process (surveys, discussion groups, interviews etc) for their project that will best produce the deliverables for that project. The team leaders are sharing proposals with one another so that the overall engagement is coordinated. The team leaders will also propose necessary overlap of team members to ensure that the teams are in communication.

The teams will decide, based on all of the consultation, what they will propose to the Executive Director for implementation through the Kalapa Executive offices. The teams will use the process of broad agreement, which will give authority to the team leader.

Pilot centres will be invited to participate in the 5 core working groups, according to their wishes and interests.

Team 1: Key Messages about Being Part of a Global Movement

This team will make proposals on:

- a. the view and articulation of what it means to be a mandala and part of a global movement
- b. specific ways in which we can heighten people's experience of being part of a global movement and a unified mandala
- c. how to systematize and make this manifest in brochures, websites, membership policies, curricula etc;

This team will be led by President Reoch.

Team 2: Membership

This team will make proposals on how we might increase our capacity to build membership at the centre and group level.

Key questions to be answered:

- a. Starting with Shambhala's current membership policy as a basis for discussion as well as our work to date on the new view of membership, is it possible/desirable to develop additional aspects of membership, e.g. a set of levels - for example, is it

desirable to include some kind of patron level of membership? Are there recommended times to formally invite membership? If so, what would those recommendations be? (This group will analyze current data from the Shambhala Database about times when people typically become members, as part of its work.)

b. Are there best practices we can collect and recommend for centers and groups to use at their own discretion? How do we invite people to become members? How do we administer this? How do we support our members in centres and groups? Do all centres and groups have a membership support person on the executive team? What is their role description?

c. Using the new draft membership brochures as a base, what would have to happen in order to have this be the standard brochure/presentation of membership in your center/group? (For example, training for Shambhala Guides, MIs, and open house coordinators in presenting membership?)

This team will be led by Ms. Anna Weinstein, Director of Centre and Group Support.

Team 3: Financial Aspects of UGM

This team will make proposals for refining the financial model of Unified Giving.

Key questions to be answered by this team:

a. How do we maintain the current level of giving in the system, including both to the local centres and to the centre of the mandala?

b. How do we redirect the flow of funds in the system so that both the local centres and the centre of the mandala continue to receive the same portion?

c. How do we share the growth in revenue at the local centres?

This team will be led by the Chagdzo Kyi Kyap, Ms. Connie Brock.

Team 4: Optimizing the Current Business Model (and Best Practices)

This team will examine the current aspects of Centre and Group revenue streams (membership, donations, programs, store sales, and rent) and propose changes that could be made to make the current business model more successful.

Key questions to be answered by this team:

1. What approaches have been or might be effective in increasing program revenue (e.g., patron pricing, annual incremental price increases, etc.)?
2. What affects program attendance and what approaches help increase it?
3. How can program attendee retention rates be increased (i.e., number of people who attend Level I that come to Level II, Level III, etc.)?
4. Drawing from the work of the membership group, how can membership contributions be increased? And how can new members be attracted?
5. What Centers/Groups have been most successful at fundraising for special projects and capital campaigns? Can those approaches be collected and shared?
6. Are there other revenue streams that are successful in different Centers/Groups (e.g., weekday rentals, classes in the community)?

This team will be led by Mr. Dan Glenn, Director of the Boston Shambhala Centre.

Team 5: Engaging beyond North America

This team will propose a way to engage the mandala beyond North America in the non- financial aspects of the campaign, working closely with the Executive Director.

Key questions to be answered by this team:

- the view and objectives of this project from the point of view of the non-North American segments of the mandala,
- ways in which the global mandala can participate meaningfully and beneficially in the work of teams 1,2 and 4, and
- areas where parallel efforts may be most beneficial
- how to design the engagement process in locally relevant ways

in Europe and Latin America, in ways that do not reference the Unified Giving model. (since they will not be participating in that aspect).

This international team will be led by Mr. Christoph Schoenherr, Director of Shambhala Europe.

4. Timeline for the work of the teams

We aim for a Fall 2013 implementation of the new model in North America. Further work is necessary to determine the feasibility of this timeline, as outlined in this document. By June we hope to have a clearer sense of the likelihood of a Fall roll-out for the campaign.

The team leaders will meet together with the Executive Director at regular intervals to be determined. The Executive Director will then provide updates to the Kalapa Council on a regular basis.

5. Meeting the leadership in person

In the recent meeting of directors of large centres in Halifax, the centre directors made a strong point of expressing how useful it would be if we could personalize the communication and provide opportunities for dialogue. As such, we propose that we make use of the Leadership gatherings in Karme Choling in May, SMC in June and Cologne in September to engage the leadership in dialogue about the Campaign. In addition, we propose that the Executive Director and Kalapa Envoy for Enrichment, and possibly other members of the Kalapa Council, try to visit several major cities as time permits.