

Report on the Director Feedback Process for the Portland Shambhala Meditation Center, 2014-2015

Director Feedback Committee
Corey Adkins, Chair, David Parker, Jay Stewart and John Smith
May 2015

The Context for this Feedback Process

The Committee began its work at the end of September 2014 and produced a final report that was submitted to Council at its February 2015 meeting. This feedback gathering process was the result of a contractual agreement to review the Council and the Director's "performance, communication practices and appropriateness of position / mandala structure" every year. That agreement was the result of the growth of the community and the organization from a small group that shared responsibility and effort to a larger situation where leadership was formalized, professionalized, and compensated. The feedback report which the committee submitted to the Director and the Council in February is confidential, but this report on the process we used is public.

The Feedback Gathering Process

We used a Google Form for the questionnaire. It was based on a draft questionnaire that we had received from Shambhala International. We abbreviated and combined some of the questions and changed some of the wording. The survey was sent to a targeted group of 52 people, three-fourths of whom held a volunteer position within the Portland Shambhala Center and one-fourth who were added in discussions with the Director. In addition we asked all members of the Portland Shambhala Center whether they would like to "opt-in" and participate in the process via a direct email to members and through a blog post about the process: <http://portland.shambhala.org/2014/12/28/reflection-feedback/>. Twenty-three people responded to the questionnaire and another 5 by email. We conducted one in-person interview. The overall response rate was 56%, including all the Council members.

Some process highlights:

- There was much discussion about our view of this process, in Council meetings, with the Director, with Jane Arthur (who was involved in leadership issues mandala-wide), and within the Committee. A professionally designed and administered 360 performance review with a coaching component was suggested after we had drafted our questionnaire. The draft from Shambhala International on which we based our questionnaire was titled "Director Development Review." However the Committee concluded that we were **not** conducting a performance review of the Director: we were collecting feedback *for* the Council and Director to use as appropriate. We saw our

role as gathering feedback and making it available to them. We offer some of our observations on the process in this report but in the Director Feedback Report we did not include our personal or collective opinions.

- The topic of feedback to and transparency of center leadership as a whole came up several times in our discussions. We decided that we had to limit our scope and leave a more general feedback process for a future time. Our focus had to be to provide helpful feedback to the Director to help her in her role. We discussed the concern that how we asked for feedback could channel criticism towards the Director that really pertained to Center Leadership in general. The Committee thinks it is important that a more general feedback or dialog a process be implemented.
- Much time was spent discussing anonymity and the process. There was concern that anonymity would encourage more critical and less constructive feedback. On the other hand there was a concern that the lack of anonymity would discourage some participants that had useful feedback from responding. Our compromise was to provide a checkbox on the survey for those who wished to have their feedback "Made Anonymous to the Director and Council." There were eight respondents took that option. Their feedback carefully paraphrased so that it was not recognizable. We hid everyone's names from ourselves and only looked at them in the few circumstances where we felt that we needed to understand a respondent's role or situation to understand their feedback. We had one potential participant express their discomfort with the lack of anonymity, and they chose not to participate.

Our Reflections

What the process did well

- Being inclusive. We included diverse and personal responses from many people, limited only by the Committee's charge and by our time and other resource constraints.
- We carefully adapted the draft questionnaire we received from the Center of the Mandala, considering input we received from Council and the Director and our understanding of the charge to the committee.
- A 56% response rate was a good indication of visibility and community interest. (Or, put another way, we had 28 responses out of a community numbering more than 110 members.)
- We balanced brevity and depth of detail by using thematic summaries and quotes (mostly direct but some that were paraphrased) with quantitative scores that provided context and enabled comparisons across the different areas of feedback.
- Our use of Google Forms, Docs and Fusion Tables made it possible to handle a lot of information within the limits of our time frame.
- The composition of the committee brought together the views of two Council members and two community members who were not on the Council.

- Providing a full-blown field test of this process that could be used to make future decisions by the Portland Shambhala Council, and provide feedback to the Center of the Mandala about this process.
- Raising the question to Council, the Director and community about the mismatch between the Director's role and scope and the half-time level of effort.
- Was a good faith effort to include the community's voice and provide transparency. Publishing this report on the process completes the two-way communication for this cycle.
- On the whole, we believe that the conversations around the entire feedback-gathering process and the negotiations that led up to this project were productive for the Council, the Director, and the community.

What the process did not do so well

- After we looked at the results, we concluded that the questionnaire itself implied a job description that was far beyond what a half-time Director could do. However, before we submitted our report neither the Director nor the Council had formally recognized that mis-match as an issue (so that recognition may be a positive outcome).
- The questionnaire focused on alignment and vision more than on the practice and skillset of a leader; in retrospect we might have assumed the former was OK and focused on the latter set of issues.
- An online questionnaire is no substitute for good face-to-face communication. We were aware that using a questionnaire was a limited kind of communication.
- The process consumed a lot of time, in Council discussions, for the Committee (we estimate that we spent more than 64 person-hours in meetings), in addition to the time people spent writing thoughtful responses to the questionnaire.

Possible improvements and questions for the future

- We did not gather detailed feedback on administrative skills and practices apart from general questions about "openness to receiving feedback." We believe that kind of specific feedback should be considered in the future.
- The Director did not receive coaching on how to incorporate the feedback she received. Conversations with Jane Arthur and good practice for 360 personnel reviews suggest that skilled coaching after a feedback process is very important but that was not in the Committee's charge nor did we have the capacity for coaching this time through.
- In the future, should any feedback process be tied directly to the Council's goals or to the Director's individual goals? Given our experience this time through, we suggest that further alignment of feedback and goal-setting may be important as the Center grows in size.
- Work remains to be done to clarify the process around gathering feedback. At an individual level for the Director that might include seeking feedback from peers, sharing experiences with them, or having follow-up conversations with community members that are motivated by the questions that our report raised. At an

organizational level it is unclear exactly how this feedback process is related to accountability or performance appraisal. Also it is not clear how accountability should be built into the employment contract of a Director.

- It is not clear to us how much to tailor feedback or accountability practice to fit specific circumstances or a specific time.
- How do we know the opinions or reactions of the community about a process such as this one? Obviously another survey questionnaire wouldn't be the answer but we are left wondering, "What did the community think?"

Our Recommendations

The Committee does not have a specific recommendation on whether a future feedback process focus on operations and skills (the "360 performance review with coaching" alternative) or on alignment and vision (an adaptation of the open-ended questionnaire that we used this year). However, we agreed that whatever process is used, it should be something that can be implemented with less volunteer hours than it took to generate this process. There is a concern with "survey burnout" by conducting the process like this annually. However it was also useful in many ways to conduct a process like this at least once every few years, as it was helpful to gauge the community mood.

Feedback for annual evaluation of Portland Center Director Lisa Stanley

* Required

About this survey

Thank you for participating in this feedback gathering process!

For each question below, provide your feedback using the following scale:

- 7 Completely agree
- 6 Mostly agree
- 5 Slightly agree
- 4 Neither agree nor disagree
- 3 Slightly disagree
- 2 Mostly disagree
- 1 Completely disagree

(There is no need to provide an answer if you do not have experience to comment on a particular question.)

Please provide concrete examples with your written comments. Your comments are the most important part, describing what your experience has been and even providing suggestions for the future.

The Director Feedback Team was appointed by the Governing Council of the Center with authority to carry out the Director feedback process designed and required by Shambhala International.

- Corey Adkins (chair)
- David Parker
- Jay Stewart
- John Smith

Your name *

(Needed by the feedback team so we can remind people to provide their input if they are late. Will only be seen by the four members of the director evaluation team. Responses will be synthesized with no direct quotes and no respondents will be identifiable.)

1. The Director is effective in embodying and articulating the view of Shambhala and the vision for the Portland Shambhala Center within that view.

1 2 3 4 5 6 7

Completely disagree ☐ ☐ ☐ ☐ ☐ ☐ ☐ Completely agree

Speak to why you chose the number you did for Question 1

2. The Director makes timely decisions when necessary in order to implement the vision for Portland Shambhala Center.

1 2 3 4 5 6 7

Completely disagree ☐ ☐ ☐ ☐ ☐ ☐ ☐ Completely agree

Speak to why you chose the number you did for question 2.

3. The Director works to plan and implement programs that are consistent with the vision for Portland Shambhala Center.

1 2 3 4 5 6 7

Completely disagree ☐ ☐ ☐ ☐ ☐ ☐ ☐ Completely agree

Speak to why you chose the number you did for question 3.

4. The Director is effective in setting priorities and distinguishing between short-term responsibilities and long-term ones.

1 2 3 4 5 6 7

Completely disagree ☐ ☐ ☐ ☐ ☐ ☐ ☐ Completely agree

Speak to why you chose the number you did for question 4.

5. The Director cares for the physical lungta of the Portland Shambhala Center, including maintenance and repair and the elegance of the internal and external space.

1 2 3 4 5 6 7

Completely disagree ☐ ☐ ☐ ☐ ☐ ☐ ☐ Completely agree

Speak to why you chose the number you did for question 5.

6. The Director fosters the financial well being of the Portland Shambhala Center, ensuring fiscal responsibility and clarity.

1 2 3 4 5 6 7

Completely disagree ☐ ☐ ☐ ☐ ☐ ☐ ☐ Completely agree

Speak to why you chose the number you did for question 6.

7. The Director works with her colleagues to raise funds for the Portland Shambhala Center, with a view that helps to create a sense of abundance and generosity.

1 2 3 4 5 6 7

Completely disagree ☐ ☐ ☐ ☐ ☐ ☐ ☐ Completely agree

Speak to why you chose the number you did for question 7.

8a. The Director is approachable by staff, visitors, and others in the sense that individuals are comfortable with bringing up problems to her.

1 2 3 4 5 6 7

Completely disagree ☐ ☐ ☐ ☐ ☐ ☐ ☐ Completely agree

8b. The Director is approachable by staff, visitors, and others in the sense that there is a sense that complaints and comments are heard by her.

1 2 3 4 5 6 7

Completely disagree ☐ ☐ ☐ ☐ ☐ ☐ ☐ Completely agree

8c. The Director is approachable by staff, visitors, and others in the sense that there is

acknowledgement and follow-up action, if appropriate, when items are brought to her attention.

1 2 3 4 5 6 7

Completely disagree ☐ ☐ ☐ ☐ ☐ ☐ ☐ Completely agree

Speak to why you chose the number you did for questions 8 a-c.

9. The Director fosters a collaborative approach to problem solving in working with management, staff, neighbors, and other appropriate groups.

1 2 3 4 5 6 7

Completely disagree ☐ ☐ ☐ ☐ ☐ ☐ ☐ Completely agree

Speak to why you chose the number you did for question 9.

10a. The Director is effective in creating Shambhala community by mentoring staff members and volunteers.

1 2 3 4 5 6 7

Completely disagree ☐ ☐ ☐ ☐ ☐ ☐ ☐ Completely agree

10b. The Director is effective in creating Shambhala community by nurturing and enriching the human environment for staff members.

1 2 3 4 5 6 7

Completely disagree ☐ ☐ ☐ ☐ ☐ ☐ ☐ Completely agree

Speak to why you chose the number you did for questions 10 a-b.

11a. The Director is effective in outreach by reaching out to the larger community (sangha members in the nearby community, visitors, non-sangha including local officials, etc.).

1 2 3 4 5 6 7

Completely disagree ☐ ☐ ☐ ☐ ☐ ☐ ☐ Completely agree

11b. The Director is effective in outreach by raising the profile of Shambhala outside of the Shambhala community.

1 2 3 4 5 6 7

Completely disagree ☐ ☐ ☐ ☐ ☐ ☐ ☐ Completely agree

11c. The Director is effective in outreach by communicating effectively to create an atmosphere of transparency and trustworthiness.

1 2 3 4 5 6 7

Completely disagree ☐ ☐ ☐ ☐ ☐ ☐ ☐ Completely agree

Speak to why you chose the number you did for questions 11 a-c.

The following 3 questions are open-ended. Please contribute in whatever way you feel is helpful and appropriate.


12a. Are you aware of systems and structures in place at the Portland Shambhala Center or within the larger Shambhala mandala that create constraints or difficulties for the Director in doing her job?



12b. Are you aware of systems and structures in place in Portland Shambhala Center or within the larger mandala that provide support for the Director in doing her job?

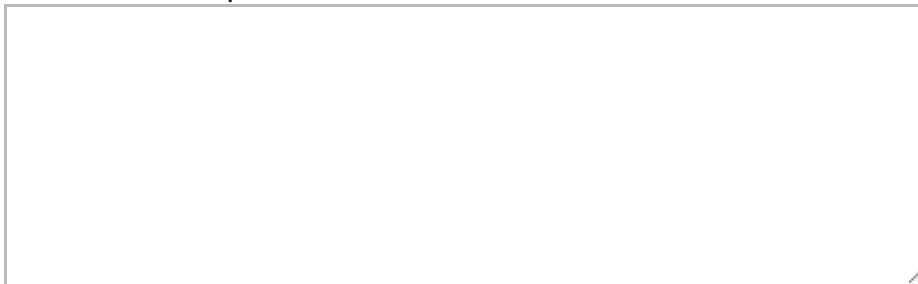


13. Please comment on any issues that have not been raised in this survey and that you feel are relevant to the way the Director fulfills her role.



The context for your interactions with the Director. *

This information will help us understand the context of your interaction with the Director. Mentioning the amount of your interaction will be particularly helpful. Please be as specific and concrete as possible.



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