

How Shambhala Centers do Calendaring

A Survey of Scheduling practices at Seven Centers

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Introduction and project goals

At a teacher's meeting last winter, one of the calendar keepers at the Portland, Oregon, Shambhala Center expressed dismay about how difficult and time-consuming the calendaring process had been. One teacher spoke up and asked how she could help, and later three other people expressed interest in helping to figure out what we might do. All centers have calendars, so we decided to ask some other centers how they do it. We picked roughly similar cities with centers that were a bit larger than Portland's 130 members, that were not part of a "region" (such as Northern California or the Front Range of Colorado), and that we thought might have good ideas to share. The list of centers we contacted is below.

Our report evolved as we talked with people and synthesized our notes -- the categories we used and the structure of the report changed as we listened and reflected on what we'd heard. Not surprisingly there are many similarities in how everyone does the job. But there are many differences as well, as you will see. "Calendaring" involves a moving, constantly changing set of elements influenced by dozens of different factors. There's a wide range of individual and organizational points of view involved. Often no one person can see the whole calendar and calendaring process in its entirety. Not only that, but we found varying definitions of the scope of "calendaring." It sounded like all of the centers could learn from each other.

We hope that you'll find ideas for some of the concerns your center has—possibly a different technology tool, a alternate planning timeline, or how to get students at all practice levels to the center at one time. If none of the ideas we describe apply to you, you can at least take comfort that calendaring is a challenge for all Shambhala Centers.

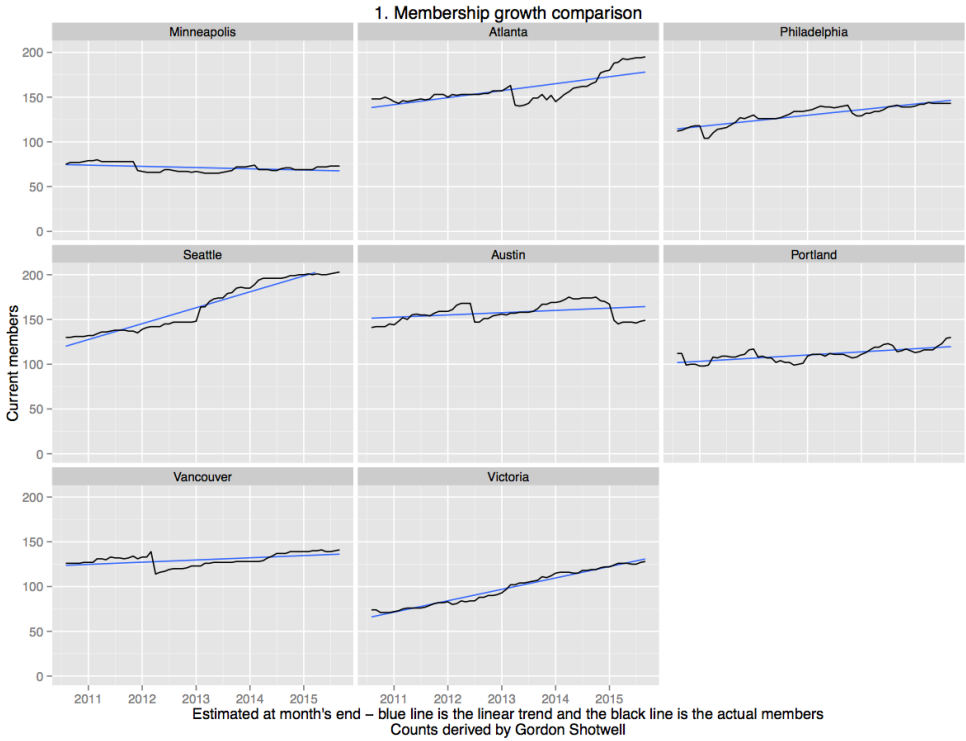
Most of the folks we talked with asked that we send them the finished report, so we decided to post it on the Shambhala Network where it is available to anyone interested in reading it.

Thanks to all centers' calendar keepers who participated. May this be of benefit!

Center Name	Person contacted or interviewed	Center Size
Atlanta	Dan Phillips, Center Director	195
Austin	Lane F. Harrell, Office Manager	149
Minneapolis	Susan Engel, P&E Director	73
Philadelphia	Sue Long, Program Coordinator	143

Portland	Lisa Stanley, Center Director Jason Bray, Director Societal Health & Wellbeing Michaela McCormick, P&E Director Abbey Pleviak, Office manager Lesa Ricci, Former Center Director David Engelbrecht, Calendar Manager	130
Seattle	Tom Gaylord, Center Director Cynthia Bradshaw, P&E Director	203
Vancouver	David Marshall, P&E Director	141
Victoria	Hamish Tucker, Center Director Susan McConnell, P&E Director	128

The graph on the right shows that the Centers which participated in this study are roughly the same size. Note that they have different rates of growth, membership rises and falls, but, on the whole, the trend lines have not changed much between 2011 and 2015.



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A Calendar's Goals

The calendar enables the organization and the community to plan ahead. How far ahead it needs to plan depends on many factors as you will see. First, most centers identified student/ cohort needs within the core curriculum, and then the center's established social traditions: nyida days, open houses, and the like. Every center we interviewed said that fiscal and budgetary considerations were a key element of calendar planning.

Some specific goals mentioned were to:

- Help get students to Rigden Weekend
- Develop, and keep to, a fixed routine for the calendar process to mitigate the amount of effort it could take
- Include perspectives from program coordinators, who represent various sangha constituencies
- Reconnect community segments that had drifted apart (only one center mentioned this explicitly but many others referenced their desire to include senior students and their practices in "the mainstream")

Calendar Challenges

Specific challenges reported by the calendar keepers with whom we talked are:

- Balancing budget goals with other considerations like teacher and staff availability
- Overloading or burning out volunteers; creating the calendar can be a lot of work and carrying out all the scheduled activities can be as well
- Process for getting a program on the calendar is unknown, misunderstood or understood differently by different individuals or groups, and it isn't coordinated well
- Unrealistic expectations of or by others, e.g., expecting someone to do something that is not part of their job
- Resolution of conflicts is not transparent, leading to confusion
- Program visibility on website: what to show or not

Editorial Observation: Many of these bear out a fundamental Organizational Development principle: confusion or lack of clarity about the process can easily lead to problems that are

probably structural but may tend to feel personal, and become so. Two areas where these commonly arise are

- Overlaps and/or gaps in roles or areas of responsibilities, and
- Coordination between teams responsible for different parts of the process

The Context - Physical and Otherwise

All the centers interviewed have between one and five shrine rooms. Most also have another room that can be used for the purpose if needed. All centers also have a community room and an office, many have a library, one center has a dedicated room for the Kasung, one has a storage room, and one a children's room.

The calendar is in effect a schedule for the individual rooms and for the people who hold activities in those rooms. It has to work for both.

The Atmosphere

Like weather, the atmosphere around the calendaring process depends on the various elements in play. The atmosphere can be neutral, okay, even appreciative when both process and the go-to person for getting on the calendar is widely known. In some centers one person is in charge and in one center that person is a trained communicator, which smooths the way.

Then, depending on circumstances, if the process is not orderly, that prompts the level of contention. And when the process is difficult, opaque, complex, and the like, there is frustration and confusion. In one case two P&E directors in a row burned out and left (perhaps not entirely due to the calendar process, but it was mentioned in this regard).

“The amount of pain experienced in the calendaring process depends on whether the calendaring person(s) naturally like problem-solving with a complex, constantly evolving set of elements.”

Technologies in Use

We didn't find a tool that would solve calendar puzzles or “do calendaring.” However, technology played a crucial role in recording decisions and arriving at them. For example, the Shambhala Database (SDB) was the technology centerpiece for all the centers we interviewed, in that it records the calendar—it collects all the details and decisions about the calendar—and it is also the main technology for displaying the calendar, for generating publicity and for registration. All the other technologies worked in support of the SDB calendar, and there was a lot of variation in how all those other tools worked.

Email, of course, was the next most important tool. One center reported that long email strings weren't useful because important information got lost or buried, while others said that they were the perfect way to keep everyone informed and keep a record of the process—and that it was essential to ‘copy in as many stakeholders as there are.’

Many if not all centers used Google calendars extensively: sometimes for planning purposes, sometimes as a point of control, and sometimes for showing events that shouldn't appear on the

public SDB. For some people it was “obvious” how to use a Google calendar; for others that was not the case.

The level of comfort with technology varied from center to center, depending on the technical ability of individuals involved. Knowing how to use the SDB was an issue for several centers; in one case our one-hour interview on calendaring practice was followed by a two-and-half hour informal training session on how to use the SDB the next day.

Apart from computer-based technologies, people reported having face-to-face meetings and work sessions, phone calls, communicating by text messages, and a few used dry erase calendars with sticky notes and sheets of paper. For the smallest center we interviewed, the whole year’s schedule of classes fit on two sides of an 8½ by 11” piece of paper, and that included rough targets for net income. Google docs, email lists and spreadsheets all played a role and were used in many different ways at different points in the planning process.

Key Players

In one sense, everyone in a Shambhala Center is involved with the calendar since it affects everyone in the community. However, specific people create and maintain a center’s calendar. In our interviews we found several kinds of people involved with the calendaring process.

- Shastris and P&E directors are most frequently involved in setting principles or an overall vision; other senior members or the center Director are also involved in a few of the centers that were interviewed.
- In most cases the P&E director leads the process of translating the vision into a plan that includes dates, events and teaching staff. The Chagdzo or others involved in financial considerations, such as the center’s council, contribute to the process at the planning level
- Translating that plan into program pages and entries in the SDB is sometimes done by the P&E team, but often it’s handed off to others, sometimes an office manager, who proofreads, edits and makes sure that all the details are correct. The calendar is the basis for newsletters and other publicity.
- Ensuring the integrity of the process is a specific and important part of the process. Sometimes that job was distributed, but often it falls to one person to keep track of all the moving parts. Several different people played that role—the P&E director, the office manager, or a designated person suited to the task, varying from center to center.
- Most centers seemed to have a gatekeeping role; one person has exclusive control of the SDB Calendar or of a master Google calendar. In most cases there were one or more people who played a backup role: they *could* make changes if necessary.

“In a busy center one or more persons have to keep an eye on the calendar more or less all the time.”

How it Works

Calendar Access and Handoffs

The overarching issues and questions for calendar access and handoffs that we heard were:

- Is there a single point of control or do many people manage it?

- How visible or clear or effective is the control point?
- The SDB calendar is best suited for recording the final decision; changes to the calendar are recorded via other communications channels (e.g., email strings, a spreadsheet, meetings)

Access

The Centers we interviewed each did the work in their own way, but all designate certain people who can make changes to the calendar. Other people do not have (or use) update access.

Examples of access at various centers are:

- Everyone involved (see section on key players) has read-only access to a Google calendar; the P&E director writes to that calendar as the point of control; two emergency backups can also write if needed, and if they have approval
- The communications team of four people who can edit the SDB
- The P&E director and the WoS coordinator, who are the programming staff, share responsibility
- Only the office manager, who “owns” the calendar that is developed by the P&E team, makes changes; a different person enters advanced practices events
- In one small center, the P&E director does everything, from planning to entering data to budgeting to sending out publicity
- In two centers, the calendar manager, office manager, Communications Director and the SH&WB Director all can make changes

Handoffs

From inception to getting something onto a center’s (SDB) calendar, there are many handoffs of the event idea and all the documentation in support of that event. For example, once a web form is filled out for an event, it is handed off to the person who approves of it. And the approver then hands it off to someone else to take the next step.

“Open communication with interested parties is the solution.”

The kinds of handoff processes are determined by the kind of event—is it an Acharya teaching the program? Does it require staffing? Is it a public event? Is it only for Scorpion Seal practitioners? And so on. This variety can create confusion if people in the handoff chain have a different understanding of an event or of their responsibility, especially since events can and do morph over time.

All centers acknowledged the difficulty of managing handoffs, and many addressed this problem by “over-communicating” via email: sending copies to everyone who has an interest in an event (e.g., P&E, finance, teachers, coordinators, planners, communications, etc.) and all stakeholders. This way everyone is informed all along the way, the communication is documented, and if someone sees a problem, they can raise the issue. Other centers said they talk with multiple people individually rather than sending emails, but most stated that open communication is the solution.

Planning and Timelines

Having some planning principles helps make the intricate calendar-planning process easier to carry out. Note that planning principles regarding the calendar itself and the *process* for creating the calendar were different.

Principles regarding the calendar itself

- Hierarchy of events: some events have priority. For every center, events that had priority on the calendar generally included (in the following order of importance):
 - Feasts and other events on liturgical days; national holidays or events such as Earth Day
 - Classes in the core curriculum (Heart of Warriorship, Everyday Life and the Basic Goodness series)
 - Classes and events involving the schedules of Acharyas and other out-of-town teachers
 - “First come, first served” means that once something is scheduled it should not be moved
- Calendar structure: events are organized or clumped. Many other principles were used to shape a center’s calendar, including:
 - Avoid scheduling a program that competes with the same program at a nearby center
 - Schedule events as “clumps.” For example, at one center, these events were regarded as non-competing in the sense that they drew different groups so could all be scheduled on the first Saturday of the month: Werma, Ikebana group, Heart of Recovery, and Ashe mahamudra. In this way, participants could be sure that their event has a place on the calendar every month.
 - Identify the times when Shambhala Center activities are unlikely and sublease the space for events such as yoga classes that can generate revenue
 - Articulate calendaring goals to enable students to complete a cycle of classes within a given period of time (e.g., accountability to students)
 - Clearly designate some events or groups of events as experimental, like holding a weekend with three levels of practice going on simultaneously
 - Schedule “a Heart of Warriorship Level - TBD” far in advance and postpone deciding *which* Level to offer until “the last minute” (a couple of months in advance)

“Allow enough time between events so that staff resources (i.e., teachers and other volunteers who tend to be involved in a given type of program) have a break.”

- Allow some weekends or periods of time with nothing scheduled for “filling in later,” to allow for a gap in the schedule or a program suggested by a sangha member
- Plan a certain number of events for the year that will roughly meet revenue targets so that calendaring can proceed without needing exact revenue estimates for each event
- All centers aim for the various “tracks” to provide what students need to progress through the curriculum at a reasonable rate. Some reported that “a reasonable rate” is a debated point—some students want to go faster
- At one center they had an explicit “track” of events that was aimed at people who are not going through a Shambhala curriculum; they come to meditate or have another teacher, but want to be in a local meditation community

Principles regarding calendar planning and development. The work of constructing the calendar must itself be scheduled.

- Each distinct phase of the calendaring process takes time and effort, and one phase generally follows another. People need to agree on when the calendaring work is going

to take place and when a phase begins or ends. Planning principles for scheduling the calendaring work that we heard included:

“Schedule calendaring work by planning horizon: working on events many months or years (for Acharya visits) ahead is separated from day-to-day or short-term calendaring (i.e., the next Nyinthun). Keeping them separate allows each process to proceed independently.”

- Plan a whole year’s calendar all at once: work out all the details and interdependencies; then focus on execution
- Plan in cycles: plan a half-year and then hold off on planning for a designated period. Each cycle builds on what was learned in a previous one

“Consciously manage last-minute additions and changes: leave open space in the calendar to accommodate them. Conversely, set limits on last-minute ideas so all the work involved in producing an event can be accomplished in an orderly fashion.”

- Establish clear handoffs
- Have a policy about responding to events proposed by members. Different centers had different principles, but all had some kind of strategy. For example, we heard these principles:
 - a) “Never say no by always suggesting an alternative time, date or space”
 - b) “We will take it under advisement and get back to you”
 - c) “If you’re not willing to coordinate, the idea doesn’t move forward”

The process for developing the calendar

Most centers use a very similar process adapted to the local membership size, city, region, budget, number of shrine rooms, etc. These factors also determine how formal or casual the calendaring process needs to be and how many people are involved.

Coordination

All centers reported that a group of people are designated to “build and manage” the calendar. Some use numerous emails throughout the process to keep them and the other stakeholders informed.

Procedures

- Many centers don’t have written procedures
- There is a lot of variation in process at most centers depending on the kind of event, constituency, coordinator responsibility, approval process, lead time, publicity
- The calendar keepers reported they keep the following things in mind when developing the calendar: how sequential classes fits together, how different classes interact with

each other, center revenues, community events, sangha interests, sangha business groups, council retreats. At one center, the treasurer has the authority to cancel a program if registration is low

- Most centers said there was one person to contact (often an office manager) to get something (other than a liturgical event or core curriculum) on the calendar. The identity of that person was clear to everyone in the center. First contact is by email to that person. At most centers, lots of responsibility for organizing the event is on the person proposing it
- Many centers use forms as the next step in the process. At some, the form is posted on the center's website, and some are sent upon request. At one center the criteria are that if a coordinator and program page are needed, a form is required; if not, no form is used
- In some centers, feast details are not on the public calendar; the feasts might be held off-site and email lists are used to self-organize on liturgical days

Great Ideas / good advice

"Be willing to experiment and play with the schedule -- don't be afraid to fail. If it fails, try something different."

Bringing people together across practice levels. Most centers reported that they struggle with the fact that there are many different practices, practice levels, and interests in Shambhala so that there is a tendency for the community to fragment. Here's how that was addressed:

- At one center, the P&E director created a **calendar module**: a cluster of weekend events that happen together on one designated weekend of every month. The events in each module are "noncompeting," in that they attract different groups. The module simplifies the calendaring process; groups participating in those events are assured of having a regularly scheduled place on the calendar, and it can bring distinct groups to the center on the same day
- Another center is addressing community fragmentation by offering a weeknight month-long lojong class, open to everyone. The P&E director assigns vajrayana practitioners (who aren't authorized to teach core-curriculum classes) to lead each class. The leaders come once as assistants and once as discussion group leader. The format is to read a text, contemplate and discuss. It has successfully brought people together across practice levels, and everyone enjoys it
- Another brings together all levels of practice in a one-weekend format, similar to a garsung. Because that center has enough shrine room space, a weekend with an Acharya can include three tracks: Vajrayana, Level V graduates, and pre-Level V students. All come together for morning and afternoon practice, lunch and tea, but separate into three groups for teachings and some practices

Problems

All centers reported problems in one or more of the following areas:

- The calendaring process isn't written down so there's no agreement on what the process really is
- Terms aren't defined so there's no agreement on what a term means (e.g., what do "last-minute" or "major event" really mean? When does the calendaring process start? When does it end?)

- A community member doesn't know the process and goes ahead and schedules something on her/his own
- A community member or office holder knows the process but does an end-around ("for a good reason")
- Exceptions to processes aren't agreed on

What would help the most?

In every instance of successful and fluid calendaring, good communication seemed to be the key for those involved in getting an event onto the calendar. What "good communication" means depends on local circumstance. For example, many people told us that they were making an effort to include "everyone" in their emails. But in several instances we heard that "too much email" was itself a problem.

Good communication seemed particularly important around the SDB. Some people thought the SDB was difficult to use, they don't know where the instructions are, the details on local conventions or procedures aren't written down anywhere and the SDB doesn't track who posted events or who made changes. As a result, communication **about** or **around** the SDB seemed to be really important at several centers.

Specific ideas mentioned

It is very helpful to have

- An agreed-upon process and clear roles
- Agreed-upon calendaring policies and for people to follow them
- A calendar secretary, manager, or even a paid calendar person
- A few additional people invited to sit in on the calendaring process, ideally those who have an overview of the center's schedule and have their thumb on the pulse of the sangha, for example the office manager
- Communication about what refinements or changes are needed and when they are implemented
- One designated person that everyone goes through and a consistent practice of referring others to that person
- More training about how to use existing tools
- Tools and agreements that would support regional planning of core curriculum classes
- Better software than the SDB for sending out the center's newsletter, like MailChimp or iContact