

We Are Looking for a Teacher

A handbook for developing the skillful means for seeking and calling a Zen Teacher

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INTRODUCTION

Since you have this Handbook, it is very likely that you have an ongoing relationship with the San Francisco Zen Center. Maybe you are a member of the San Francisco Zen Center's Affiliates' Program. Perhaps you have even had one or more of Zen Center's teachers visit your group.

Since you have this Handbook your Zen sitting group, or Sangha, has probably reached the stage in its life where there is a real possibility of calling a Zen teacher to come and share your group's life and practice. Or, your Teacher, Abbess, or Abbot has announced their intention to retire.

There are many, many ways to search for a teacher. This Handbook is meant to be a guide only. Its suggestions can be strictly followed or used as an aid in broadening awareness of the issues that normally arise in any search for new leadership in any situation. Whatever way you use it, we hope it will provide a structured, practical, and sensitive approach for your Sangha to engage skillfully in this endeavor.

The major focus of this Handbook deals with calling a Teacher, Abbess, or Abbot for the first time. At the end there is a section that brings up the complex issue of seeking a successor to a seated Teacher.

Inviting a teacher is one of the most important things a Sangha can do. If done well, it can be a deeply satisfying and enlightening experience for both Sangha and candidates. Finding the right person for the position is essential and takes a lot of hard work and more time than you'd think. But taking the time to do the work will give you a solid foundation upon which your future life together as a Sangha will be built.

Note: I was for some years the Deployment Officer for the Episcopal Diocese of Maine. The work of this position was to aid parishes in their search for clergy and clergy looking for work in parishes. Much of what is included here comes from the years of research and experience of the national Episcopal Church Deployment Office (used here with permission from that office}. Some of what here is included comes from my own experience in the field.

PART I: WE Are Looking for a Teacher.

DIRECTION FINDING

To look for a Teacher (or Abbess or Abbot) is, without a doubt, the most important decision your Sangha will make. Your new Teacher will very likely be your greatest asset or your biggest liability.

For a person to be a fully qualified teacher he or she must have received Dharma Transmission from his or her teacher. Through this ceremony he or she becomes an “authorized teacher for the world to proclaim the Dharma to all sentient beings” (from the Dharma Heritage Ceremony of the Soto Zen Buddhist Association).

What this means, then, is that when a fully ordained priest is called, that individual comes on board with certain accountabilities beyond the local Sangha in that he or she has taken a blood oath to preserve and transmit the traditions and teachings of the larger Sangha of his or her lineage.

It will be important to remember that you won't be “hiring” your Teacher. Our lineage in Zen Buddhism has come to us from China to Japan and to us through the life and teachings of Shunryu Sukuki Roshi. Within that tradition this notion of “hiring for money” doesn't occur. The calling of the priest is not seen in business terms. The relationship between Teacher and Sangha is more like a marriage than merely hiring a CEO. The Teacher and Sangha enter into a deeply committed relationship wherein both parties are expected to do everything possible to make it work for the good of the overall life and practice of the Sangha. In fact, it is so strong a bond that should it happen that this relationship becomes no longer tenable, it can be dissolved only by mutual consent or by arbitration and decision.

When the notion of calling a teacher first arises, attention will probably be focused on the “Teacher” part of “We Are Looking for a Teacher.” That is, you will ask your friends in the Zen world if they know of any teacher who might be interested. You may ask other Zen teachers whom they might recommend.

As word gets out, all kinds of people will be suggesting names for you to consider. You may get inquiries from interested teachers as well. **It is critically important that you do not jump the gun and start the process before you have done the preparatory work beforehand. It is imperative to be able to greet each prospective candidate equitably, with a well thought out, well structured plan that will allow the candidates to get to know you and you them.** As names start being mentioned, you'll want to know what these prospective teachers are like. Will you like them? Will they like you? Much later,

you may ask just what kind of a person do we want; what kind of a person do we need to fill the position of teacher?

Meanwhile, the teachers who might be interested in you will be asking their friends in the Zen world, Who is this group? Where is this group? What's the town like? What are they like? What size group is it? What's their practice like? How do they see themselves? Do they have a residential program? Do they have a priest-training program? What kind of person are they looking for? What's their vision for the future? Do they want to carry on in the tradition of Suzuki Roshi? Am I a good match for the position? These teachers will want to know who *you* are. They will hear quite a lot from their friends and colleagues who know or have heard about your group. When you and the prospective teachers come together, it will hopefully be a mutual sharing of who each of you are and what you have to offer each other. So it is essential that you do the work necessary to be able to answer the question "Who are we?" openly, honestly, and fairly.

It is a good idea to contact the Coordinator for Affiliated Sanghas at the San Francisco Zen Center when your Sangha is thinking about or ready to begin the task of looking for a teacher. The Coordinator will help to answer your questions, make suggestions on how you can develop, and move through the process of looking for a teacher skillfully, respectfully, and deliberately, and will help with the scheduling of teacher visits to your Sangha.

A cautionary note: it might not be obvious, but when you let a prospective teacher know that you are interested in them even as a possible candidate, their life starts to change in big and subtle ways. New possibilities start emerging for them about who they are, where they are, and how their future may take a whole different direction. They begin to think about leaving their home, wondering if this would be the right move, wondering if they'd be chosen . . . In short, you enter their lives in a very intimate way. Therefore, all care, sensitivity, thoughtfulness, and respect must be exercised in your work. Again, experience has shown that a search process that is unplanned, freewheeling, and undisciplined easily leads to misunderstandings and hurt feelings for both Sangha and prospective candidates.

THE SEARCH COMMITTEE

So who's going to do this work? Your Board's ongoing job is to manage the Sangha's financial affairs and is authorized to select and call the teacher. Since the planning and administering of the search process is different from the Board's usual work, it is customary for the Board to create a Search Committee (accountable to the Board) to do the planning, researching, contacting, and interviewing of potential candidates for the position of Teacher.

GUIDELINES FOR CHOOSING A SEARCH COMMITTEE

The Search Committee and its chair and co-chair are appointed by the Board. The Search Committee should include 6 to 10 persons, broadly representative of all major groups, constituencies, and viewpoints (men and women, young and old, etc.), including at least one and no more than 2 Board members. (In a very small Sangha the Board often becomes the Search Committee.)

Search Committee members should be:

- Active in the center for at least a year.
- Regular participants in the center's practice life and programs.
- Able to meet as often as weekly for 6 months to a year without missing more than two meetings in a row.
- Representative of all
- Good team players, able to work with the other members of the Committee and be sensitive to the needs of the community.
- Able and willing to maintain the standard of absolute confidentiality, even at home.
- Persons of practice and spiritual discipline.

Persons not eligible to serve:

- Members of the clergy who might be considered as possible candidates.
- Relatives of the former Teacher.
- Spouses, relatives, or immediate family members of the Board.
- Two persons from the same household.

GUIDELINES FOR SEARCH COMMITTEE MEETINGS

A project's success never lies merely in getting something done; it's linked with what happens to the team on the way to the completion of the task. As dedication and trust grow, that group can overcome differences, surmount obstacles, and accomplish something significant for others, often with a sense of unity that's a joy to experience.

Every committee does better with commonly understood group "norms," that is, how we all agree to behave and interact with each other.

Here is a set of working principles (norms) for any committee. It might be beneficial if each member kept a copy with them at every meeting.

The leader of a committee expects those who serve to:

- Begin and end on time, remaining until adjournment. This shows a spirit of thoughtfulness and respect for each other.
- Determine how absences will be handled. Perhaps members should commit to not missing two meetings in a row, etc.
- Items for the meeting agenda should be communicated to the chairperson at least a day before the scheduled meeting. There should rarely be “surprise” agenda items.
- Listen. Listen, Listen. Never interrupt or “talk-over” a person who’s talking, or make “side comments.”
- Contribute ideas, and be flexible enough to modify those ideas as the group plan evolves. Even if you are a quiet introvert, you have a responsibility to communicate at meetings.
- Stick to the topic at hand. Meandering from one subject to another wastes time.
- Action follows decision. Make sure you know what you’re to do and by when. Report your progress to the leader regularly so your work can be coordinated with that of others.
- Strive for group unity. Approach the whole process with wisdom and compassion for all who will be involved in or affected by the committee’s work.
- Respect confidentiality. Important information, especially where you are in your process, needs to be shared with everyone. Personal issues and information need to remain private.

The committee member expects the leader to:

- Be on time, if not early, for all meetings. Someone might be asked to come early to make coffee or set up the room. End on time.
- Be prepared for the meetings and reasonably organized about the committee’s work.

- Provide all pertinent information to the members in a timely fashion. Prepare a written agenda and distribute it well before the meetings.
- Run the meetings so that all business gets done without wasted effort and with due consideration for those persons attending.
- Have one person speak at a time so that everyone can get the chance to be heard.
- Should an issue become emotionally charged, it's up to the chair or another member to repeat back to the person what they are hearing that person saying. Otherwise that person will need to keep repeating themselves until they feel heard.
- Coordinate the work with other bodies in the community to avoid overlap, encroachment, or misunderstanding.
- Keep the Board, Sangha, and candidates informed as to the progress of the committee's work.
- Respect confidentiality. Articulate the guidelines of confidentiality for the committee. Strive for open communication while protecting personalities.

For any meeting:

- Silence is OK. It can enhance a meeting. Don't be afraid to allow silence to happen. It is also good to begin each meeting with a time of meditation.
- Personal behavior, such as making eye contact, body language; respectful, active listening, and refraining from "side comments" are important to positive group functioning.
- Open-ended questions, non-judgmental comments, and not interrupting each other enrich the experience.
- Be aware of possible "railroading." This is where a strong member of a committee pushes his or her ideas through a committee so quickly and persuasively that there is not enough time for objections, consideration, or discussion to occur.
- Avoid criticizing, name-calling, moralizing, or diverting from the subject at hand; and be aware of communication stoppers like "We tried that before," "Yes, but . . . ," "Many people are saying . . . —always ask, "How many?"

TASKS OF THE SEARCH COMMITTEE

1. Contact the Coordinator of Affiliated Sanghas at the San Francisco Zen Center.
Let the Coordinator know how it's going and get help with any questions or problems that arise or guidance in keeping things on track and in the proper sequence.
2. Making your Committee into a **Team**.
To be able to be able to trust each other and be comfortable about disagreeing with one another, even in front of candidates, there needs to be a team feeling in the group. Folks often try to skip this part altogether, but by giving it a little attention people will feel "on board" as part of the group and empowered right from the beginning.
Team-building can happen by having each of your members respond to questions like these:
 - What attracted you to our Sangha?
 - What are the 2 most important things for you about our Sangha?
 - What does it mean to you be asked to serve on this committee?
 - What do you hope will happen for you during the course of your work?
 - What are some of your concerns, fears, questions about being on this committee?The chair can then describe the general search process model to the group. After this, or any, meeting it is good to hear how the meeting was for its members. This is called an "evaluation" and can be determined by responding to questions like:
 - What did you find most helpful in this meeting?
 - What did you find least helpful?
 - What is important for you to have in future meetings?
 - Other thoughts, suggestions, comments.
3. Work up a **Time Line** for your process.
If your Sangha has strong leadership and there are no serious factions in its membership, the time required for your search process could be around 6 months.
If there have been serious problems or divisions in the Sangha, it could take anywhere between 6 months to a year.
Whatever the case, it is imperative that you take all the time you need to do the search well.
4. Request a **Budget** from the Board
This will include estimated costs for copying, telephone; travel, food & entertainment for final candidates, and moving costs.

5. Keeping the Sangha informed

Inform your Sangha about the general shape of the process you've developed and keep them up to date about where you are in it (receiving names, ready for visits, ready to make a decision, etc.).

6. Self-Study and Profile of your Sangha (1 to 2 months)

As stated earlier, **it is critically important that you do not jump the gun and start the process before you have done this preparatory work beforehand. It is imperative to be able to greet each prospective candidate equitably, to share the same information, and to ask the same questions, with a well-planned, well thought out, method that will allow the candidates to get to know you and you them.**

Once you do this foundational work, then you can start to consider candidates and to be able to give them the information about you that they need to know.

If you do get inquiries, just thank them and let them know that when you are ready you will get in touch with them.

Remember, a process done too hurriedly or carelessly will easily lead to misunderstandings and hurt feelings on both sides.

In order to provide prospective candidates with a clear and informative answer to their question, "Who are you?" the Search Committee needs to gather and put together all the pertinent information it can in order to be able to have the mutual sharing that's involved in looking for a teacher. Just as you will want to know all you can about the prospective teachers, they will be just as eager to find out from you who you are: your history, how things are at present in your Sangha and its teaching and practice, your hopes for the future, what shape you're in financially; and what your local community's like and what your role is in it.

Do not assume you already "know" your Sangha without doing any homework. The self-study produces a consensus of how the Sangha members see themselves, their present situation and expectations for the future. In **Part II** we'll look at what the position of "Teacher" means to you and what kind of person you're looking for.

The bringing together of who you are is easily accomplished in coming up with a Profile of your Sangha. During one of your meetings (or it could be with a general Sangha meeting) there would be a "brainstorming" session where a committee member would ask those present to respond out loud, one at a time, to: "our history," "what's our Sangha like these days," "what are our hopes," "fears," "challenges," "what is a teacher?" "what qualities are you looking for in a teacher?" etc. The leader would write down on newsprint (so that everyone could see it) the *exact words* that the people said. *Exact words*

(not interpretations) tell the folks you're listening to them and they really appreciate it. The meeting can end with the same evaluation that the Search Committee did above in #2. This meeting can be fun, creative, surprising, and certainly informative. For sample areas to look at in articulating a picture of your Sangha and community, see **Appendix A**.

To this information the Committee can add any financial information about the Sangha (income statement, balance sheet, etc.) that would be helpful in giving the prospective candidate a realistic picture of how things are going.

After gathering this information, it can be put together by one of the Search Committee members into any form it chooses. It could be a narrative with pictures, a video, etc. Be creative, have fun.

After the Sangha profile is finished, it is then submitted to the Board for its approval, then made available to the Sangha at large. It will also be sent to possible candidates along with other information.

PART II: We Are Looking for a TEACHER

In your Self-Study you receive a lot of information about who you are, where you've come from, and the possibilities for the future. Now is the time to start thinking about what kind of teacher who will be a good fit with the needs and vision of your Sangha.

7. Discovering a Leadership Style

Most likely, you now have a sense about the kind of leadership your Sangha needs at this point in its life. One of the ways of articulating this leadership style is to have your committee members complete the **Leadership Profile I for the Sangha** in **Appendix B**. This will give you the ability to ask articulate questions during the interviews with candidates. You might wish to send each candidate the **Leadership Profile II for Teachers** in **Appendix C** so you all will be on the same page.

8. Developing a Draft Position Description

A position description sets forth the *position* and what is expected to be covered by that position. It should not attempt to describe the *person* in the position. This is a very different issue and can be covered elsewhere.

The position description should be understood to be a **draft**. Usually the particulars of a position description are negotiated with the new Teacher and depend to some extent on the her/his particular strengths, preferences and work style. The draft position description serves to describe the position as the Sangha initially sees it without knowing who the Teacher will be. Once the Teacher has been on the job for a year, it is time to review the document and bring it into line with the way things are then perceived by all parties to the agreement.

In preparing a position description avoid lists of duties. You are preparing to call a person who has professional training and presumably knows what kinds of day-by-day activities are needed to achieve desired results.

The Position Description describes the “**specific areas of inquiry and accountability**” that you would like covered by a teacher.

These areas might include, for example:

- **Teaching:** the ability to lead in the identification, design and implementation educational programs.
- **Counseling:** This is for those teachers who have received some degree of professional training in assisting persons facing problems or decisions.
- **Administration:** the ability to exercise oversight of all aspects of center programs, organizations, finances, etc.

- **Interfaith and Community Involvement:** the ability to exercise leadership in interfaith programs.
- **Leadership Development:** the ability to train, empower and lead persons to take on positions of leadership in the center's life.
- **Liturgy:** the ability to plan, adapt and conduct services.
- **Diversity:** the ability to create and sustain an environment that honors and celebrates multi/cross-cultural diversity with sensitivity.
- **Pastoral Care:** the ability to nurture and equip persons within the Sangha to provide caring at significant life stages, e.g., death, dying, sickness, birth, crisis, success.
- **Dharma Talks:** the ability to convey the Dharma clearly and enthusiastically.
- **Self-care:** the ability to take care of oneself in times of high stress.

For a **Model Draft Position Description**, see **Appendix D**.

9. Formulating a Personal Characteristics Description

In addition to the position description, which describes the *position*, you may want to draw up a profile of your requirements for the *person* you are looking for. This could be included with the Sangha Profile and Draft Position Description or kept as information for the Search Committee. Whatever is to be said about traits (sense of humor), qualifications, abilities or experience should be in a separate (no longer than one page) document. Once the search is over, that document is no longer relevant. The position description, however, continues to be a functional document. Do not indicate that you are limiting the scope of your search on the basis of age, sex, sexual orientation, marital status or race.

An example:

We seek an individual with good all around health, humor and sensitivity; of broad intellectual interests, well read, who enjoys being with diverse kinds and conditions of people, and who can appreciate the geographical and sociological characteristics of our setting.

We look for someone who is confident, who will get excited about and support Zen practice; someone with good business sense and capable of delegating responsibilities with a knack for eliciting accountability; a supporter and who can empower others – a collaborative leader.

We seek an individual who embodies and enjoys teaching the Dharma, and who is concerned with the quality of our practice life together.

10. Simple Questionnaire

Sometimes a simple questionnaire is included with the Profile, Draft Job Description, and Personal Characteristics. If you include a questionnaire, do not ask a lot of questions and don't ask questions for which you already

have answers.

This is an area where the search committee can get into some serious trouble. A lengthy questionnaire in which the candidate is asked to express an opinion on every controversial issue under the sun is not called for and will be resented. Rather, make a friendly invitation for commentary when it is clear that the candidate is not expected to take a lot of time and might even enjoy doing it.

For example:

"We would like to come to know you in a more personal way than is possible through profiles and résumés. We invite your response in any way that seems appropriate to you.

"Will you share with us, out of your work, Sangha or family life, hobby or leisure:

- Something you are currently doing that has you excited, challenged;
- An early life accomplishment (specific, short term) that you are still proud of;
- Something new you would like to try in the future?"

Such a request seems disarmingly simple. Yet in reading the responses you will discover that a warm, friendly relationship is beginning to grow.

(Sometimes questionnaires are confrontational or indicate some hidden agenda the committee is wrestling with and so have the opposite effect.)

Furthermore, you will be picking up clues about the individual's ability to articulate a point, sense of humor, balance between work and play, and much more.

11. Sending the information to the prospects you are interested in and receiving theirs

Now that you have completed this preparatory work, you are in an excellent position to start relating to prospective candidates.

You will be able to meet any candidate as a fully informed body representing the interests of your Sangha, aware of what you have to offer a teacher, what you require from a teacher, and knowledgeable enough to ask the right questions of your candidates.

It is time to send your information those who have expressed an interest in your Sangha. This information can include your Sangha Profile, the Position Description, (Personal Characteristics Description, optional), your Questionnaire, and the Leadership Profile for Teachers. You might also include your latest Newsletter, a copy of the local newspaper.

Invite them to send their résumés, if they have not already done so, and other information they feel might be useful to you. And be sure they know your deadline for hearing back from them.

PART III: The Candidates

Buddhism is very new in this country. As it has continued to grow and take root, the number of Sanghas able to consider looking for their own residential teacher has been increasing. This increase has stimulated an increase in the number of fully trained teachers in the Suzuki Roshi lineage needed to meet that growth.

You will start receiving names from friends, other teachers, and elsewhere. If the names are of possible candidates living and working at one of the centers of the San Francisco Zen Center, it is important to be in touch with the Coordinator of Affiliated Sanghas. It is this person's job to coordinate possible candidates' visits to you so that your process may be as smooth and organized as possible. Again, it can be very helpful to have received from those prospective candidates their résumés and how they see their own leadership style (from the Leadership Profile). This will help you narrow down the number of potential candidates you will want to proceed with. These prospective candidates can then be considered as "candidates."

12. Reviewing résumés, etc.; checking references

Receiving the résumés and other information from the interested prospective candidates, tells you they are still interested in pursuing the position. It would be helpful here to check out by telephone who they've listed as references.

13. Selecting those you now consider to be candidates, who you will invite for the interviewing visits

Most of our Affiliates have been doing in their process is to invite the candidates to their Sanghas for a 2 to 3 week visit.

Notify those prospective candidates who will and will not be considered further.

GUIDELINES FOR A CANDIDATE'S VISIT

In communicating with candidates, be sure they have just **one** contact person. This will eliminate confusion and duplication of effort. In written communication, it is also helpful and considerate to let the candidates know **who** their responses are being written for (the Chair, the whole committee, the whole Sangha).

The attitude to have regarding candidates and their visit is that they are an honored guest and Zen teacher. Avoid the idea that they are there as a possible employee. The Teacher-Sangha relationship is a deeply intimate one, not unlike a marriage in some ways. Both the Teacher and the Sangha will be offering their gifts, talents and devotion to each other.

Be explicit about arrangements for transportation, hospitality, speaking with individuals and groups of the center, schedules and talks, sightseeing, social

events with the Sangha, expenses, and time for relaxation time—all with flexibility for the comfort and convenience of the candidate (and spouse, if included).

INTERVIEWING GUIDELINES

Interviewing is perhaps the most critical and vital part of the calling process. It is a time for **inter-viewing**—a time for the candidate and the Sangha to view each other searchingly through eyes of wisdom and compassion, to ask hard questions, and finally to make hard decisions.

Interviews are not merely casual dialogue in a social setting. They should demonstrate how the candidate communicates his or her practice and understanding effectively and intelligibly in small groups and with individuals.

Interviews should be held in a quiet, comfortable place with a relaxed atmosphere, a definite duration of time set in advance, planned breaks for stretching and refreshments, and scheduled opportunity for questions from the candidate.

The interviewing should not be open to the whole Sangha, and generally not to anyone who is not part of the whole search process. To involve the members of the Sangha in any part of the process tends to line up pressure groups, based on limited knowledge of candidates and task.

Spend plenty of time talking about how you will handle interviews. Practice listening for what candidates are really saying. Do not hesitate to ask, “What do you mean by that?” Or, “Say something more about that.”

Thorough preparation before interviews should assure a relatively uniform process for **all** candidates. Candidates would appreciate a listing of the Specific Areas of Inquiry (see above, #8) concerning the role of Teacher that are important to you that are likely to be discussed in the interview.

Confidentiality. You will be dealing with much information that cannot properly be shared. However, distinguish between "confidentiality" and "secrets." People can understand that someone has to deal with sensitive information and that confidentiality is appropriate. Yet they also can be informed, for example, that the committee is no longer accepting any more names. Thus, people are appropriately informed and involved, confidentiality is maintained and there is still no hint of secrets.

The Search Committee should remember that it is acting not only in its own name but also in trust for all members of the Sangha.

Remember that the candidate will be “viewing” the Sangha and its activities while you are “viewing” the life and teaching of the candidate.

Try to create an attitude of mutual interviewing between the candidate and the committee. Be prepared for, and open to, questions which the candidate may ask. Their questions can profitably shape as much as half of the interview. How they go about learning about you helps you understand how they work.

Every question you might think of can be evaluated in three ways: What does it have to do with the position? Why do we need to know? Would I be willing to answer the same question about myself?

It is important to be as forthcoming as possible about any important problems or challenges your Sangha is dealing with. If the candidate doesn't hear about them from you, s/he will hear about them from someone else.

For each category of questions, your objective is to discover what may happen in the life of your Sangha and its membership if this candidate is called.

Answers may be less important than the feeling or attitude behind them—energy, conviction, enthusiasm, sensitivity, respect for acceptable differences and contagious personal inspiration.

It is important to know not only about the candidate's training, practice life and spiritual journey but how s/he would guide, direct and accompany other people in theirs.

The candidate and committee must get to know each other well enough to avoid inadequate impressions or snap decisions. Provide sufficient time and opportunity to be with candidates in a variety of situations.

Do not under any circumstances ask a candidate, "If we did call you, would you accept?" It's like saying, "If I asked you to marry me, would you say yes?" Resist the temptation to say to any candidate, "You're the one we (or I) want." You must see the process you've developed through to the end.

Do not in any way suggest that you're asking the candidate to enter a contest, compete with others for a job, or prove his/her good points or advantages. Your attitude throughout should be, "We are asking you to be with us in a mutual discernment process, as we are together determining the future of this Sangha." Let them know you understand that.

Committee members should ask themselves, "Will the relationship wear well, through good times and bad, in the deepest of human experiences." You may make new discoveries about each other—facts about the candidate and about the Sangha that were unrecognized beforehand.

Don't keep the candidates waiting after your decision. Inform them as soon as possible.

HOW TO CONDUCT AN INTERVIEW

Interviewing is a skill, which can be learned. For an overview of Experienced-based Interviewing and Interviewing Techniques, please see **Interviewing in the Search Process, Appendix E**.

See also, **Perils and Pitfalls, Appendix G** and **Barriers to Communication, Appendix F**.

What follows are some suggestions about how your committee might parcel out the work required to do an interview.

- Note-taker(s): This is a member of the committee who observes and records in a low-key way, what is said during the interview, especially the responses to the questions. This is a key role because this person provides important data for the committee. By having more than one note-taker, the committee has the advantage of more than one written perspective on what was said at the interview.
- Candidate Advocate: This is a member who tries to see the interview, the questions, and the situation from the eyes of the candidate. This role helps insure that the candidate fully understands the questions and the implications of the questions. The Advocate might interrupt a question to clarify it for the candidate. The Advocate is as familiar as possible with the background of the candidate and can provide insight for both the committee and for the candidate. If you use this role it would be good for the person to introduce themselves to the candidate and explain the role to her/him.
- Interviewers: These are the members who will actually be asking questions about the “specific areas of accountability” during the interview. These are the areas that you included in your Draft Job Description (Teaching, Counseling, Administration, etc.). Each person is responsible for one of these areas and would read up on the relevant information the candidate has sent and will ask the questions and follow-up questions on that topic area as they relate to your Sangha. For example, if Carol is responsible for questions about Teaching, it is her job to be sure that she has gleaned any examples of the candidate’s experience in Teaching.

A TYPICAL INTERVIEW

The actual interview itself might have the following format.

- In a relaxed manner, the chair would welcome the candidate, introduce the committee members, and describe the format of the meeting. The chair

would ask if there are any questions about the format the candidate might have.

- Then the area questions and follow-up questions would begin. Since the interview is a *mutual* one, the candidate will most likely be asking relevant questions of the interviewer during this time.
- When all have finished, the chair asks the candidate if she/he has questions. This would be a mutual sharing of information.
- The chair thanks everyone and adjourns the meeting. The candidate leaves and the committee debriefs.

AFTER INTERVIEWING A CANDIDATE

Everything of a personal nature revealed by the candidate is privileged information and should **never** be disclosed. All records of a search committee should be destroyed after the call is extended and accepted.

Debriefing: Immediately after each interview the group should meet and share impressions of the person interviewed. First impressions may be especially valuable, even if modified by later reflection. At this point more complete notes may be recorded to avoid confusion later.

Notification: Once you no longer wish to consider a candidate, he/she should be notified promptly—with an expression of gratitude for the time and attention given.

Feedback: If, in this or later stages of your selection process, a candidate demands to know why he or she was "screened out," do not be intimidated. You have no such obligation to explain. Other than "We all agreed it wasn't a good fit," further discussions of "what figured against him/her" in your group's confidential process not only violates those confidentiality, but also sets you up in a role that you cannot and do not have the time to follow through on. So politely explain that you are not free to discuss what went on in that confidential meeting and drop it.

PERILS & PITFALLS OF E-MAIL

E-mail has been shown to be effective in conveying documents, dates and times, but research has shown that it is often undependable and perilous as a mode of interpersonal communication. E-mails lack any face-to-face or voice-to-voice interaction, or the deliberation and care of a letter. Perhaps because it is easy to click on "SEND" button, there is a very great possibility of sending a message

that is easy to misinterpret or misunderstand, especially if there is any emotional charge in the words.

If you do use e-mail with a candidate be sure to be **very careful** how the e-mails are written so as to convey exactly and as clearly as possible what you're trying to say or ask. If there is any hidden agenda involved, it could very possibly be confusing to the recipient.

If you include the candidate on some inter-committee e-mails, never refer to the candidate in the third person, as "he" or "she," rather by her or his name. For example, "(Name of the candidate) said . . . ," not "He or she said"

HOW TO EVALUATE A DHARMA TALK

While the candidates are with you there will hopefully be many chances to hear them give a Dharma talk. This is one of the principle modes of communicating not only the Dharma, but also the *person* giving the talk.

See **How to Evaluate a Dharma Talk, Appendix H.**

PART IV: THE DECISION

Based on all the information you have received on each of your candidates it is now time to assess the skills, abilities, and personal characteristics of each candidate.

One way to do this assessment is to list the "specific areas of accountability" (Teaching, Counseling, Administration, etc.) from your Draft Position Description. The notes taken of each interview will serve to remind you of how each candidate replied to each area. You would then rate the candidate's response to each area using a 5-point scale:

1. Poor, 2. Weak, 3. Acceptable, 4. Good, 5. Excellent

You can also see how the candidates' Leadership Profile, résumé, Questionnaire, and personal characteristics match up with your needs.

Consensus

The most inclusive way to make a decision is by *consensus*. It doesn't mean what most people think. It doesn't mean a majority or even a large majority agree with the terms of the decision. It doesn't mean everyone agrees—that would be *unanimous*. A decision made by consensus is one that everyone in the group agrees to *support* the decision. Some individual group members may not agree with the terms of the decision, but are willing to support it.

Take as long as you need to assess each candidate, discuss and come to a decision, which will be presented to the Board for their decision.

PART V: THE END OF THE SEARCH COMMITTEE'S WORK

When the Search Committee presents the name(s) it has selected to the Board, its work is done.

Now is the time to have a party to celebrate the hard work you have done together.

PART VI: THE NEW BEGINNING

The Board may want to interview the candidate again or will just issue the call and notify the candidates not chosen.

It will notify the Sangha of its decision. It will also create a committee to celebrate the arrival of the new Teacher and assist him or her in making the transition into your Sangha and the larger community.

Shortly after the new Teacher arrives, the Board will work out a draft Letter of Agreement, which outlines mutual expectations, compensation, future mutual evaluation, time off, etc

See **Model Draft Letter of Agreement, Appendix I** and **Guidelines for a Mutual Review, Appendix J**.

PART VII: THE ISSUE OF SUCCESSION

Throughout the long history of Zen the passing on of leadership from one generation to the next has gone from without incident all the way to a violence that has sent designated successors running for their lives. There is no reason to expect that it should be any different in this country.

Zen in America has in the last few years begun passing on the mantle to the next generation. One traditional way to do this has been for the incumbent teacher to name his or her successor. But whatever method is used it has sometimes been difficult. There are many examples of dharma-sibling rivalry, no designated successor, well-meaning teachers who really weren't quite ready to pass on their authority, Sangha rebellion, etc., etc.

All this has been dependent on the karmic context and histories of the particular temples and the personalities of the individuals involved each, most likely, with the best of intentions.

What we might learn from these attempts is to be very careful and as conscious as possible about these karmic conditions. The method of self-study mentioned above might be one way to identify and meet the issues that arise when the spiritual leader announces that it is time to pass on the robe and bowl.

One way to get help would be to contact those Sanghas that have gone through this transition in leadership smoothly, without incident and those for which it has been traumatic. The wisdom gleaned from their experience can be invaluable. Hopefully, doing this kind of background work will help lay a foundation upon which a deliberate, conscious, well-planned and compassionate transition can be built.

**QUESTIONS TO CONSIDER IN THE SELF-STUDY & DEVELOPING
A COMMUNITY PROFILE**

Dogen Zenji, the founder of our school of Buddhism said, “To study the Buddha Way is to study the self.” The Self-Study a Zen center goes through between Teachers is one of the most important and creative activities it can do. This time sees the flourishing of lay leadership, the development of strong teamwork, the celebration of your history together, the healing of old wounds, taking stock of your life together, assessing your resources and dreaming of your future, then selecting a new teacher and starting afresh.

One of the results of the self-study is to come up with a profile of your center or group written in narrative style that can be read by new people interested in your group, by members of your group, as well as by perspective candidates for the Teacher position.

What follows is a pretty comprehensive list of items that can be included in telling the story of who you are, where you’ve come from, and where you hope to be as a Zen group.

1. Description of the history of your local area and community
2. Description of your local area and community now
 - a. What is the weather like in your area?
 - b. Population trends, ethnic distribution, industrial situation, labor force (% male/female), recreational facilities, community problems; number of dual parents employed with children under 18.
 - c. Your neighborhood
 - i. % commercial, % manufacturing, % open space, % undeveloped, % private homes, % rented, % farmland.
 - ii. Map of area would be helpful.
 - iii. Size: miles, acres, city blocks.
 - iv. Zoning of the area.
 - d. Occupations: professional, managerial, sales and clerical, farm/rural, laborers, household services (food handlers, innkeepers), others.
 - e. Median family incomes:
 - i. % over \$30,000
 - ii. % from \$20,000 to \$30,000
 - iii. % from %10,000 to \$20,000
 - iv. % less than \$10,000
 - f. Governmental agencies and institutions serving the public.

APPENDIX A

- g. Number of families in supplementary income under 65 years of age, over 65 years of age.
 - h. Hospitals and medical care available.
 - i. Growth patterns in the school system and opportunities for education (School District Census).
 - j. What are the cultural opportunities in your area?
 - k. What are the other religious communities in the community and what is your relationship to them?
 - l. How does your Zen Center view itself in the community?
 - m. What are the ways in which your Zen Center already serves the community? How can it change or improve?
 - n. What are some new avenues of service in the community?
3. Description of your Zen Center Community
- a. Its history
 - i. Particularly your oral history, its stories, memories (e.g., “When I joined this sangha, I remember”)
 - ii. How you got started; when you got your first building, etc.
 - iii. Your leadership, heroes and heroines who have inspired you over the years.
 - iv. Important, moving, inspiring ceremonies you remember.
 - v. Important feuds and fights.
 - vi. Crisis points.
 - vii. The birth and death of key groups.
 - viii. Achievements.
 - b. Statistics about membership, age, sex, children, financial and budgetary matters.
 - i. What number and percentage of your membership live:
 - 1. In the same community as the center.
 - 2. In surrounding communities (name them)
 - 3. What percentage of your members
 - a. Walk you our center.
 - b. Use cars.
 - c. Use public transportation?
 - ii. Age profile of your members:
 - 1. 0 – 5: # %
 - 2. 6 – 14: # %
 - 3. 15 – 19: # %
 - 4. 20 – 24: # %
 - 5. 25 – 39: # %
 - 6. 40 – 54 # %
 - 7. 55 – 64: # %

APPENDIX A

8. 65- over: # %

TOTAL:

iii. Educational level of members:

1. No high school diploma: # %

2. High school graduates: # %

3. College graduates: # %

iv. Average attendance at major weekly program:

Average attendance on weekdays:

- c. Description of your center's property, buildings, and resident's and Teacher housing; overall value of the plant.
- d. Description of your center's organizations, committees, groups and their purpose.
- e. Description of your center's programs, activities, the needs they meet and how many attend.
- f. Description of your center's communications (Internet, mailings, newsletter)
- g. Description of your temple schedule, ceremonies and attitudes towards these. What are your wants and expectations?
- h. How would you describe your Zen community's strengths and weaknesses?
- i. How would you describe your relationships with Zen centers in your region?
- j. How would you describe your relationship with SFZC?

- 4. What is your sense of the membership's self-image or identity?
- 5. What is your Mission Statement (if you have formulated one)?
- 6. What Goals and Objectives does your Zen community hope to achieve in the next two to four years, if you have determined them.
- 7. What kind of leadership (Teacher position description) would best meet your needs?
 - a. The position description should grow out of the above information about your current situation and hopes for the future.
 - b. Using the **Leadership Profile** would be helpful here.
 - c. What skills are needed in such a Teacher?
- 8. What is your current budget, financial statement, endowment information, and membership giving patterns?

APPENDIX A

- a. Describe the Teacher's financial package: moving costs, stipend, housing allowance, medical insurance, continuing education, sabbatical, vacations, retirement, etc.

9. List of the Board and Search Committee members.

Profile best written in narrative style; pictures, drawings, graphs, etc. enhance a profile.

Be creative. Have fun.

APPENDIX B

LEADERSHIP PROFILE I

What I like to see in a teacher/leader.

Directions: Indicate the style you see yourself as a teacher/leader with respect to the statements on either side of the graph. Put a dot at either end of the graph to indicate strong tendencies, or towards the center of the graph to indicate less strong. For example:

| | | | | | | | | | | |
|---|--|--|--|--|--|--|--|--|--|--|
| 24. Am often a leader in community affairs. | | | | | | | | | | Am seldom a leader in community affairs. |
|---|--|--|--|--|--|--|--|--|--|--|

Indicates fairly strong leadership in community affairs.

When dealing with people:

| | | | | | | | | | | |
|---|--|--|--|--|--|--|--|--|--|---|
| 1. Is most often quiet and reserved. | | | | | | | | | | Most often sparks interaction and stimulates others' participation. |
| 2. Helps people to figure out things themselves. | | | | | | | | | | Advises people what to do. |
| 3. Usually lets people know where one stands. | | | | | | | | | | Usually keeps one's opinions to oneself. |
| 4. In a conflict situation usually advocates for what s/he thinks is the best solution. | | | | | | | | | | In a conflict situation usually seeks consensus. |
| 5. In a conversation, usually concentrates on listening. | | | | | | | | | | In a conversation, usually concentrates on getting one's point across.. |
| 6. Prefers one-on-one meetings. | | | | | | | | | | Prefers group meetings. |

In terms of leadership style:

| | | | | | | | | | | |
|--|--|--|--|--|--|--|--|--|--|---|
| 7. Does own organizing. | | | | | | | | | | Relies on others to organize details. |
| 8. Generates ideas. | | | | | | | | | | Adapts ideas. |
| 9. Relies on direction from superiors. | | | | | | | | | | Relies on strong personal sense of direction. |

| | | | | | | |
|---|--|--|--|--|--|---|
| 10. In bringing about change, primarily makes use of conflict, challenge, and confrontation. | | | | | | In bringing about change, primarily tries to avoid conflict and makes use of collaboration and negotiation. |
| 11. Encourages subordinates to take initiative. | | | | | | Gives strong directions to subordinates. |
| 12. Willingly tries untraditional approaches. | | | | | | Prefers working within traditional ways. |
| 13. Places little emphasis on national and world issues. | | | | | | Places much emphasis on national and world issues. |
| 14. Plays "by the book." | | | | | | Plays "outside the box." |
| 15. Is skilled in many things. | | | | | | Does a few things really well. |
| 16. Prefers working with groups | | | | | | Focuses on working with individuals. |
| 17. Interested in providing guidance in monastic life and practice | | | | | | Interested in providing guidance in lay life and practice. |
| 18. Desires to practice as a temple priest, maintaining forms and ceremonies for lay community. | | | | | | Desires to practice as a Dharma teacher within a lay community. |

When planning, programming, and evaluating:

| | | | | | | |
|---|--|--|--|--|--|--|
| 19. Prefers to plan for situations that may arise. | | | | | | Prefers to meet each situation spontaneously. |
| 20. Understanding and emphasis on Buddhist monastic life. | | | | | | Understanding and emphasis on Buddhist lay life |
| 21. Welcomes and solicits feedback. | | | | | | Prefers to self-evaluate in private. |
| 22. Usually has a broad view of the situation. | | | | | | Usually concentrates on the details of a situation. |
| 23. Is goal-oriented, seeks good outcomes. | | | | | | Is process-oriented. Wants action to be inclusive and to promote group cohesion. |
| 24. Willing to seek help from others. | | | | | | Usually is self-reliant. |
| 25. Is a person of "vision." | | | | | | Is a person of the "here and now." |

In relation to the larger, local community:

| | | | | | | |
|--|--|--|--|--|--|--|
| 22. Is often a leader in community affairs. | | | | | | Is seldom a leader in community affairs. |
| 23. Speaks out on controversial issues affecting the community. | | | | | | Feels it is not the role of a priest to speak out on controversial issues. |
| 24. Interested in development of collaborative relationships with other religious (Buddhist and non-Buddhist) organizations. | | | | | | Interested in community action through purely Buddhist organizations. |

Regarding religious views:

| | | | | | | |
|---|--|--|--|--|--|--|
| 25. Religious views are fairly stabilized. | | | | | | Religious views are significantly changing. |
| 26. Interested in development of a contemporary American Zen practice. | | | | | | Interested in maintaining tradition and ties to Japanese Zen lineage and practice. |
| 27. Feels that ethical decisions should be based on a literal interpretation of the precepts. | | | | | | Feels that ethical decisions should be made with a creative, nuanced interpretation of the precepts. |
| 28. Should be a role model for others | | | | | | Is not a role model for others. |

When giving Dharma talks, teaching, or officiating at ceremonies:

| | | | | | | |
|--|--|--|--|--|--|---|
| 29. Has an informal, conversational delivery and style. | | | | | | Has a formal, authoritative delivery and style. |
| 30. Teaches by provoking and challenging ideas. | | | | | | Teaches via support and reassurance |
| 31. Often refers to contemporary writers as a source of ideas | | | | | | Rarely refers to contemporary writers as a source of ideas. |
| 32. Values being appreciated as intelligent and authoritative. | | | | | | Values being appreciated as open and honest. |
| 33. In ceremonies it is important that they be done correctly. | | | | | | In ceremonies it is important that they be done with sincerity. |

Once a group fills these out, you can note where there are the most dots on each line item, providing a sense of what the group as a whole values most.

APPENDIX C

LEADERSHIP PROFILE II for TEACHER

How I see myself as a teacher/leader.

Directions: Indicate the style you see yourself as a teacher/leader with respect to the statements on either side of the graph. Put a dot at either end of the graph to indicate strong tendencies, or towards the center of the graph to indicate less strong. For example:

| | | | | | | | | | | |
|---|--|--|--|--|--|--|--|--|--|--|
| 24. Am often a leader in community affairs. | | | | | | | | | | Am seldom a leader in community affairs. |
|---|--|--|--|--|--|--|--|--|--|--|

Indicates fairly strong leadership in community affairs.

When dealing with people:

| | | | | | | | | | | |
|--|--|--|--|--|--|--|--|--|--|---|
| 1. Am most often quiet and reserved. | | | | | | | | | | Most often spark interaction and stimulate others' participation. |
| 2. Help people to figure out things themselves. | | | | | | | | | | Advise people what to do. |
| 3. Usually let people know where one stands. | | | | | | | | | | Usually keep my opinions to myself. |
| 4. In a conflict situation usually advocate for what I think is the best solution. | | | | | | | | | | In a conflict situation usually seek consensus. |
| 5. In a conversation, usually concentrate on listening. | | | | | | | | | | In a conversation, usually concentrate on getting one's point across. |
| 6. Prefer one-on-one meetings. | | | | | | | | | | Prefer group meetings. |

In terms of leadership style:

| | | | | | | | | | | |
|---|--|--|--|--|--|--|--|--|--|--|
| 7. Do own organizing. | | | | | | | | | | Relie on others to organize details. |
| 8. Generate ideas. | | | | | | | | | | Adapt ideas. |
| 9. Relie on direction from superiors. | | | | | | | | | | Relie on strong personal sense of direction. |
| 10. In bringing about change, primarily make use of conflict, challenge, and confrontation. | | | | | | | | | | In bringing about change, primarily trie to avoid conflict and makes use of collaboration and negotiation. |

| | | | | | | |
|--|--|--|--|--|--|--|
| 11. Encourage subordinates to take initiative. | | | | | | Give strong directions to subordinates. |
| 12. Willingly try untraditional approaches. | | | | | | Prefer working within traditional ways. |
| 13. Place little emphasis on national and world issues. | | | | | | Place much emphasis on national and world issues. |
| 14. Play "by the book." | | | | | | Play "outside the box." |
| 15. Am skilled in many things. | | | | | | Do a few things really well. |
| 16. Prefer working with groups | | | | | | Focus on working with individuals. |
| 17. Interested in providing guidance in monastic life and practice. | | | | | | Interested in providing guidance in lay life and practice. |
| 18. Desire to practice as a temple priest, maintaining forms and ceremonies for lay community. | | | | | | Desire to practice as a Dharma teacher within a lay community. |

When planning, programming, and evaluating:

| | | | | | | |
|---|--|--|--|--|--|---|
| 19. Prefer to plan for situations that may arise. | | | | | | Prefer to meet each situation spontaneously. |
| 20. Understanding and emphasis on Buddhist monastic life. | | | | | | Understanding and emphasis on Buddhist lay life |
| 21. Welcome and solicit feedback. | | | | | | Prefer to self-evaluate in private. |
| 22. Usually have a broad view of the situation. | | | | | | Usually concentrate on the details of a situation. |
| 23. Am goal-oriented, seek good outcomes. | | | | | | Am process-oriented. Want action to be inclusive and to promote group cohesion. |
| 24. Willing to seek help from others. | | | | | | Usually am self-reliant. |
| 25. Am a person of "vision." | | | | | | Am a person of the "here and now." |

In relation to the larger, local community:

| | | | | | | |
|--|--|--|--|--|--|---|
| 22. Am often a leader in community affairs. | | | | | | Am seldom a leader in community affairs. |
| 23. Speak out on controversial issues affecting the community. | | | | | | Feel it is not the role of a priest to speak out on controversial issues. |

| | | | | | | | |
|--|--|--|--|--|--|--|---|
| 24. Interested in development of collaborative relationships with other religious (Buddhist and non-Buddhist) organizations. | | | | | | | Interested in community action through purely Buddhist organizations. |
|--|--|--|--|--|--|--|---|

Regarding religious views:

| | | | | | | | |
|--|--|--|--|--|--|--|---|
| 25. Religious views are fairly stabilized. | | | | | | | Religious views are significantly changing. |
| 26. Interested in development of a contemporary American Zen practice. | | | | | | | Interested in maintaining tradition and ties to Japanese Zen lineage and practice. |
| 27. Feel that ethical decisions should be based on a literal interpretation of the precepts. | | | | | | | Feel that ethical decisions should be made with a creative, nuanced interpretation of the precepts. |
| 28. Should be a role model for others | | | | | | | Do not strive to be a role model for others. |

When giving Dharma talks, teaching, or officiating at ceremonies:

| | | | | | | | |
|--|--|--|--|--|--|--|---|
| 29. Have an informal, conversational delivery and style. | | | | | | | Have a formal, authoritative delivery and style. |
| 30. Teach by provoking and challenging ideas. | | | | | | | Teache via support and reassurance |
| 31. Often refer to contemporary writers as a source of ideas | | | | | | | Rarely refer to contemporary writers as a source of ideas. |
| 32. Value being appreciated as intelligent and authoritative. | | | | | | | Value being appreciated as open and honest. |
| 33. In ceremonies it is important that they be done correctly. | | | | | | | In ceremonies it is important that they be done with sincerity. |

MODEL: DRAFT POSITION DESCRIPTION

NOTE: *This is a description of the position of Teacher as we are now able to see it. Since we believe a position description should be the product of dialog and agreement between Teacher and Sangha, this document is a “draft” formulated to guide us in the search and initial months of incumbency, and subject to revision later as mutually agreed.*

Position:

Teacher, (Center Name)

The position in brief:

The Teacher is the spiritual leader, principal liturgical leader, spiritual caregiver and chief executive officer of the Sangha, with responsibilities and functions traditionally associated with the office, and further interpreted here.

Organizational relationships:

The Teacher reports to the Board and bears certain authorities of the office. S/he supervises directly or indirectly all employed staff and volunteer clergy, is *ex officio* a member of every Zen center organization and may appoint individuals or groups to specific responsibilities as deemed needed or desirable.

Specific areas of accountability:

- **Teaching:** the ability to lead in the identification, design and implementation educational programs.
The Teacher is responsible for a comprehensive program of Buddhist education for members of all ages.
Performance is considered satisfactory when:
 - Teacher is a willing and enthusiastic participant in the education at the center and feels solid Sangha support.
 - There are visible signs of teaching activity – bulletin boards, paraphernalia. Etc. – so that all are conscious of the importance of the programming.
 - Parents are interested and knowledgeable participants in their children’s education.
 - Educational events attendance increases 5% per year through (year).
- **Counseling:** for those who have received special training: the degree of professional certification for assisting persons facing problems or decisions.
You can add your own “Performance is considered satisfactory when:”
- **Administration:** the ability to exercise oversight of all aspects of center programs, organizations, finances, etc.

APPENDIX D

The Teacher is responsible for effective performance in planning, program design and implementation, general administration, communications, organization and delegation.

Performance is considered satisfactory when:

- Members in various assigned accountabilities know their jobs, feel that the Sangha is making effective use of their time and talents, and experience support and authentication in their work.
 - Administration is not requiring more than a quarter of the Teacher's available working time.
 - Sangha printed communications get read.
 - The Teacher, while not necessarily an accountant, has a solid working knowledge of current Center finances.
 - The Sangha is maintaining its buildings and grounds as a safe, attractive environment in support of its practice.
 - A vision, plan of action and long-range goals are guiding the activities of the Center.
 - Regular performance reviews of all key personnel, including the Teacher, are providing feedback and contributing to professional growth and self esteem.
- **Community and Interfaith Involvement:** the ability to exercise leadership in interfaith programs.

The Teacher is expected to be a responsible citizen of our town/city.

Performance is considered satisfactory when:

- The Teacher is perceived by the wider community as caring priest, friend and positive influence beyond the Sangha.
 - The Teacher is contributing to the welfare of the community in some tangible way such as membership on the Interfaith Group, service organizations, etc.
 - Ecumenical activity in our town/city is stronger because of the influence of the Zen Center.
- **Leadership Development:** the ability to train, empower and lead persons to take on positions of leadership in the Sangha's life.
- You can add your own "Performance is considered satisfactory when:"***
- **Liturgy:** the ability to plan, adapt and conduct services.

The Teacher is responsible for establishing standards and schedules for the

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liturgical services and practice of the Sangha and for leading the services and

practice.

Performance is considered satisfactory when:

- Services flow with dignity and reverence, with few distractions or fumbling by participating leaders (doans, assistants, etc.) and with a sense of the presence of a spirit of unity and devotion.
- There is frequent discussion of the themes of the Dharma talk in informal settings following the talk.
- Departures from the liturgical norms of the center are explained, accepted and eventually seen to be improving the quality of the service or practices.

- **Diversity:** the ability to create and sustain an environment that honors and celebrates multi/cross cultural diversity with sensitivity.

You can add your own “Performance is considered satisfactory when:”

- **Pastoral Care:** the ability to nurture and equip persons within the center to provide caring at significant life stages, e.g., death, dying, sickness, birth, crisis, success.

The Teacher is responsible for assuring that Sangha members are receiving continuing nurture, support and authentication in their personal lives and practice. And that they experience the support of their practicing community at special times of joy, celebration, bereavement or crisis.

Performance is considered satisfactory when:

- It is evident that Sangha members – including the Teacher – enjoy and find relaxation in one another’s company in, for example, practice, social, work activities.
- Some concerted effort is being made to develop and support people in in-depth pastoral/ spiritual/practice counseling.
- There are few complaints of pastoral neglect.
- People involved in life’s transitions (joyful or painful) feel the care and support of their Zen center Sangha.
- Members are confident of the availability of liturgical services and counseling related to the areas of healing, reconciliation, care for the dying, etc.

- **Dharma Talks:** the ability to convey the Dharma clearly and enthusiastically.
You can add your own “Performance is considered satisfactory when:”

For a Model for Evaluating a Dharma Talk, see Appendix H.

- **Self-care:** the ability to take care of oneself in times of high stress.
You can add your own “Performance is considered satisfactory when:”

INTERVIEWING IN THE SEARCH PROCESS

EXPERIENCE-BASED INTERVIEWING

In any interviewing situation, the object is for the interviewer to understand what makes the person interviewed “tick.” That means being able to get beyond and behind the superficial information to discover the PERSON. That process is helped greatly when the questioner frames the questions in a way that directs response toward specific actions and feelings, as opposed to ideas, theories, and abstractions. Anyone can learn to do this kind of experienced-based interviewing. It simply means becoming more intentional and more disciplined than in a casual conversation.

CASUAL CONVERSATION

1. How important do you consider educational programs at a Zen center?

2. What is the role of young people in the life of a Zen center?

3. What is your administrative management, supervisory style?

4. How important do you think pastoral care is?

5. What relationship should a center have with people who are mentally ill?

6. How flexible should a Teacher be in conducting ceremonies

4. Give us an example of a situation that involved pastoral care.

5. Describe a situation where you have dealt with a person who was mentally ill.

6. Give an example where you adapted a traditional ceremony to meet special needs.

EXPERIENCED-BASED INTERVIEWING

1. Describe the program, budget, and time commitment that you have given to education in your present position.

2. Say something about what you have done to make young people feel welcome and involved at your center.

3. Can you share with us an example of a worker-supervisor relationship that you have been a part of in which both persons were growing and performing at a high level.

SPECIFIC QUESTIONS FOR RESPONSE

- How do you work with the terminally ill?
- What is your experience of doing weddings?
- Give us an example of your style of conflict management.
- How do you take care of yourself during times of heavy stress?
- What inspires, enlivens you to stay alive and interested in the midst of your daily routine?
- What do you do with your free time?
- Give us an example of where your Zen training served you well.
- What role do families have at a Zen center?

INTERVIEWING TECHNIQUES

Open Inquiry Questions

Open inquiry questions are those that require more than a simple yes or no answer. Such questions begin with: what, where, when, who, why, and how. For example:

- “Please tell us about a time when you . . .”
- “How do you (or have done) . . .?”
- “What have you found to be the best way to . . .?”
- “What is your experience with . . .?”

Closed Inquiry Questions

Questions of this type are strictly a means of obtaining factual information. This type of question does not encourage an expanded response and may limit the candidate’s answer. For example:

- “Have you dealt with people who are dying?”

Probing/Encouraging Techniques

This is a means of asking questions that are open-ended and allows the candidate to elaborate on his/her answers. For example:

- “That’s interesting, please keep going . . .”
- “We’re getting a really clear picture; can you tell us more?”
- “Can you give us another example along the same lines?”

Nonverbal Behavior

Nonverbal behavior includes body language that encourages response such as keeping eye contact, nodding, leaning toward the person, and the use of pauses and silence.

Reflection of Feeling

This is used to identify and reflect the candidate's emotions and feelings as s/he expresses them in the interview. This may be especially evident in response to questions in the areas of conflict management, social justice, etc.

Effective Listening Skills

These include paraphrasing, reflecting content, and summarizing. These skills require the ability to hear and restate clearly the verbal content of a candidate's statements.

SPECIFIC AREAS OF INQUIRY INTERVIEWING CANDIDATES

- **Administration:** the ability to exercise oversight of all aspects of center programs, organizations, finances, etc.
- **Teaching:** the ability to lead in the identification, design and implementation educational programs
- **Counseling:** for those who have received special training: the degree of professional certification for assisting persons facing problems or decisions
- **Interfaith and Community Involvement:** the ability to exercise leadership in interfaith programs
- **Leadership Development:** the ability to train, empower and lead persons to take on positions of leadership in the center's life
- **Liturgy:** the ability to plan, adapt and conduct services
- **Diversity:** the ability to create and sustain an environment that honors and celebrates multi/cross cultural diversity with sensitivity
- **Pastoral Care:** the ability to nurture and equip persons within the center to provide caring at significant life stages, e.g., death, dying, sickness, birth, crisis, success
- **Dharma Talks:** the ability to convey the Dharma clearly and enthusiastically
- **Self-care:** the ability to take care of oneself in times of high stress

BARRIERS TO COMMUNICATION [& RIGHT SPEECH]

[I received this many years ago as a handout; as such I pass it on to you. My own comments are in brackets.]

We think that if we can talk we can communicate. We are taught that communicating is easier than it is. So when we run into a barrier in communicating we easily get mad or discouraged and give up. Because we don't understand the nature of the problem we don't know what to do. [Someone has said that **the wonder is not that communicating is as difficult as it is, but that it occurs as much as it does.**]

What follows is a list of the ways we communicate that actually block communicating. In this study we'll look at twelve examples of these barriers. These barriers are considered to be high-risk responses, likely to block conversation, thwart the other person's problem-solving efficiency, and increase the emotional distance between people. These high-risk responses are most likely to happen when you or the other person is experiencing stress. It is particularly helpful when you notice the stress so that you can deliberately choose *not* to use these responses.

The twelve barriers to communication can be divided into three major categories: judgment, sending solutions, and avoidance of the other's concerns:

JUDGING

1. Criticizing
2. Name-calling
3. Diagnosing
4. Praising Evaluatively

SENDING SOLUTIONS

5. Ordering
6. Threatening
7. Moralizing
8. Excessive/Inappropriate Questioning
9. Advising

AVOIDING THE OTHER'S CONCERNS

10. Diverting
11. Logical Argument
12. Reassuring

Ways of judging:

Psychologist Carl Rogers gave a lecture on communication in which he said he believed the *major barrier* to interpersonal communication lies in our *very natural tendency to judge*—to approve or disapprove of the statements of the other person. One of the characteristics that is often revealed in meditation practice is just how judgmental we are. It often comes as a shock. A person will come out of the zendo and say, “I can’t believe how judgmental I am.”

At that same lecture Carl Rogers said, “As you leave the meeting tonight, one of the statements you are likely to hear is, ‘I didn’t like that man’s talk.’ Now what do you respond: almost invariably your reply will be either approval or disapproval of the attitude expressed. Either you respond, ‘I didn’t either. I thought it was terrible.’ Or else you tend to reply, ‘Oh, I thought it was really good.’ In other words, your primary reaction is to evaluate what has just been said to you, to evaluate it from *your* point of view, your own frame of reference.” He went on to say, “Although the tendency to make evaluations is common in almost all interchange of language, it is very much heightened in those situations where feelings and emotions are deeply involved. So, the stronger our feelings, the more likely it is that there will be no mutual element in the communication. There will be just two ideas, two feelings, two judgments missing each other in psychological space. I’m sure you recognize this from your own experience. When you have not been emotionally involved yourself, and have listened to a heated discussion, you often go away thinking, ‘Well, they actually weren’t talking about the same thing.’ And they were not. Each was making a judgment, an evaluation from his own frame of reference. [Since there was no attempt to understand where the other person was coming from,] there was really nothing which could be called communication in any genuine sense. This tendency to react to any emotionally meaningful statement by forming an evaluation of it from our own point of view is, I repeat, the major barrier to interpersonal communication.”

1. Criticizing: Making a negative evaluation of the other person, her actions, or attitudes. “You brought it on yourself—you’ve got nobody but yourself to blame for the mess you’re in.” “Oh, you always say that.” “He’s just an idiot.”

Many of us feel we ought to be critical—or other people will never improve. Parents think they need to judge their children or they will never become hard-working, mannerly adults. Teachers think they must criticize their students or they will never learn. Supervisors think they must criticize their employees or production will slip. For some people criticism is a way of life. [But criticism, more often than not,] fosters anxiety, arouses resentment, tends to thwart honest self-expression, and invites pretense.

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It is worth observing our interactions to see how frequently we are critical. [Judging others verbally, behind their backs can seem to relieve

frustration we might be feeling. The problem is that speaking in a denigrating way of others actually can leave us with a really bad feeling inside, almost as if by trying hurt the other person, we actually end up hurting our own heart.

2. Name-calling: “Putting down” or stereotyping the other person. “What a dope!” “Just like a woman” “You hardhats are all alike.” “You’re just another insensitive male.” “You’re just a”

Name-calling and labeling usually have negative overtones to both the sender and receiver. “Wasp,” “intellectual,” “brat,” “bitch,” “shrew,” “autocrat,” “jerk,” “dope,”—these all attach a stigma to the other. Some other labels, however, provide halos: “bright,” “hard worker,” “dedicated,” “a chip off the old block,” “a real go-getter.”

Labeling prevents us from getting to know ourselves and other individuals: there is no longer a person before us—only a type. Clark Moustakas says, “Labels and classifications make it appear that we know the other, when actually, we have caught the shadow and not the substance. Since we are convinced we know ourselves and others . . . (we) no longer actually see what is happening before us, and, not knowing that we do not know, we make no effort to be in contact with the real. We continue to use labels to stereotype ourselves and others, and these labels have replaced human meanings, unique feelings and growing life within and between persons.”

3. Diagnosing: Analyzing why a person is behaving as he is; assuming to know the other’s motives. “I can read you like a book—you are just doing that to irritate me.” “Just because you went to college, you think you are better than I.”

Some, instead of listening to the substance of what a person is saying, play emotional detective, probing for hidden motives, psychological complexes, and the like.

A secretary who went to work for a psychologist resigned within a month. When a friend asked why, the former secretary said, “He proclaimed what motives were behind everything I did. I couldn’t win. If I came to work late, it was because I was hostile; if I came early, it was because I was anxious; if I arrived on time, I was compulsive.”

Communication tends to be thwarted when one person informs another that she is being defensive, or self-deceiving, or that she is acting out of guilt or fear or some other unconscious motive.

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4. Praising Evaluatively: Making a positive judgment of the other person, her actions, or attitudes. “You are always such a good girl. I know you will help me with the lawn tonight.” Teacher to teenage student: “You are a great poet.”

There is a common belief that all honest praise is helpful. Many parents, teachers, managers, and others endorse praise without reservation. Praise “is supposed to build confidence, increase security, stimulate initiative, motivate learning, generate good will and improve human relations,” says Haim Ginott. Thus, at first sight, praise seems to be an unlikely candidate to qualify as a roadblock. However, positive evaluations often have negative results.

Praise is often used as a gimmick to try to get people to change their behavior. When someone with ulterior purposes offers praise, there is often resentment, not only of the effort to control, but also of the manipulation experienced. David Augsburger says that it is not always true that to be praised is to be loved, “To be praised is often to be outsmarted, outmaneuvered, out-sweet-talked.”

Even when it is not used manipulatively, praise often has detrimental effects. Have you ever noticed how people defend themselves against praise as though they were protecting themselves against a threat? Their guardedness and defensiveness cause them to come up with a stock of denials such as:

“I don’t think it’s *that* good.”

“It wasn’t much, really.”

“I can’t take the credit for it; my assistant thought it up.”

“It was just luck.”

“I should have done it better.”

[This doesn’t mean] *all* forms of encouragement are detrimental. This is far from the case. Expressing positive feelings toward people is an important element of interpersonal communication.

Ways of sending solutions:

Another group of roadblocks involves sending solutions to other persons. The solutions may be sent caringly as advice, indirectly by questioning, authoritatively as an order, aggressively as a threat, or with a halo around it as moralizing. Some ways of sending solutions obviously carry higher risks than others. *All* of these ways of sending solutions, however, are potential barriers to communication, especially when one or both of the persons is experiencing a need or a problem. Sending a solution often compounds a problem or creates new problems without resolving the original dilemma. [It’s not] that sending solutions is never appropriate, but sending solutions can erect barriers and can thwart another person’s growth.

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5. Ordering: Commanding the other person to do what you want to have done. “Do your homework right now.” “Why, because I said so.” An order is a solution sent coercively and backed by force. When coercion is used, people often become resistant and resentful. Sabotage may result. Or people who are constantly given orders may become very

compliant and submissive. Orders imply that the other's judgment is unsound and thus tend to undermine self-esteem.

6. Threatening: Trying to control the other's actions by warning of negative consequences that you will instigate. "You'll do it now or *else*." "Stop that noise right now or I will keep the whole class after school."

A threat is a solution that is sent with an emphasis on the punishment that will be forthcoming if the solution is not implemented. Threats produce the same kind of negative results that are produced by orders.

7. Moralizing: Telling another person what she *should* do. "Preaching" at the other. "You shouldn't get a divorce; think of what will happen to the children." "You ought to tell him you are sorry."

Many love to put a halo around their solutions for others. They attempt to back their ideas with the force of social, moral, or theological authority. Moralizing speaks with "shoulds" and "oughts" but it chooses other wordings, too. "It's the right thing to do." "You don't visit me enough." "Shoulds" are often implied, even when they are not stated directly. "Moralizing is demoralizing." [Like criticism] it fosters anxiety, arouses resentment, tends to thwart honest self-expression, and invites pretense.

8. Excessive or Inappropriate Questioning: Closed-ended questions are often barriers in a relationship; these are those that can usually be answered in a few words—often with a simple yes or no. "When did it happen?" "Are you sorry that you did it?"

Some kinds of questions have their place in communication. But questions can be real conversation-stoppers, for example:

"Where did you go?"

"Out."

"What did you do?"

"Nothing."

Day after day, parents ask, "How was school today?" and day after day they hear the droned response, "OK."

Some people ask questions constantly. When this happens, they experience an almost total drying up of conversation. When loved ones share so little with them, these questioners desperately resort to more questions to keep at least a trickle of disclosure coming from the other person. But the added questions retard the communication even more.

[We can become] addicted to questioning. While there are constructive ways of asking *occasional* questions, extensive questioning

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usually derails a conversation. In everyday conversation, questions are usually a poor substitute for more direct communication. Questions are incomplete, indirect, veiled, impersonal and consequently ineffective messages that often breed defense reactions and resistance. They are rarely simple requests for information, but an indirect means of attaining an end, a way of manipulating the person being questioned.

9. **Advising:** Giving the other person a solution to his problems. “If I were you, I’d sure tell him off.” “That’s an easy one to solve. First . . .”

Advice is another of the most commonly used of the roadblocks. [When someone is troubled, it is almost impossible not to want to give them advice.]

What’s wrong with advice? Advice is often a basic insult to the intelligence of the other person. It implies a lack of confidence in the capacity of the person with the problem to understand and cope with his or her own difficulties. As Norman Kagan puts it, “In essence, we implicitly say to someone, ‘You have been making a “big deal” out of a problem whose solution is immediately apparent to me—how stupid you are!’”

Another problem with advice is that the advisor seldom understands the full implications of the problem. When people share their concerns with us, they often display the “tip of the iceberg.” The advisor is unaware of the complexities, feelings, and the many other factors that lie hidden beneath the surface. Dag Hammarskjold said, “Not knowing the question, it was easy to give the answer.”

Ways of avoiding the other’s concerns:

A journalist once commented that the first law of conversation is that if there is any possible way to derail the train of dialogue, someone will do it. The remaining three roadblocks—diverting, logical argument, and reassurance—are notable for getting conversations off the track.

10. **Diverting:** Pushing the other’s problems aside through distraction. “Don’t dwell on it. Let’s talk about something more pleasant.” Or; “Think you’ve got it bad?! Let me tell you what happened to me.”

One of the most frequent ways of switching a conversation from the other person’s concerns to your own topic is called “diverting.” The phrase “Speaking of . . .” often signals the beginning of a diversion. Much of what passes for conversation is really little more than a series of diversions. For example,

Patient: This was such a painful operation! I didn’t think I would be able to stand it. It was just . . .

Visitor A: Speaking of operations, I had my gallbladder out in 1976. What a time I had . . .

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Visitor B: That’s the hospital my grandson was taken to when he broke his arm . . .

And on and on.

What happened to the patient’s concerns?

Sometimes people divert a conversation because they lack the awareness and skills to listen effectively. Sometimes they are grabbing the focus of attention for themselves. At other times people resort to diversion

when they are uncomfortable with the emotions stimulated by the conversation. People often dislike talking about affection, anger, conflict, death, sickness, and other topics that create tension in them. When these topics are the focus of conversation, they divert the conversation to a topic more comfortable for them.

11. Logical Argument: Attempting to convince the other with an appeal to facts and logic, usually without consideration of the emotional factors involved. "Look at the facts; if you hadn't bought that new car, we could have made the down payment on the house."

Logic has many important functions. When another person is under stress, however, or when there is conflict between people, providing logical solutions can be infuriating. Though it may seem that those are the very times we most need logic, it nevertheless has a high risk of alienating the other person.

One of the main problems with logic in situations of personal or interpersonal stress is that it keeps others at an emotional distance. Logic focuses on facts and typically avoids feelings. But when another person has a problem or when there is a problem in the relationship, feelings are the main issue. When persons use logic to avoid emotional involvement, they are withdrawing from another at a most inopportune moment.

12. Reassuring: trying to stop the other person from feeling the negative emotions she is experiencing. "Don't worry, it is always darkest before the dawn." "It will all work out OK in the end."

What could be the problem with reassuring? Like the other eleven barriers, reassurance can drive a wedge between people. Haim Ginott writes:

Once in a blue moon, almost every parent hears his son or daughter declare, "I am stupid." Knowing that *his* child cannot be stupid, the parent sets out to convince him that he is bright.

Son: I am stupid.

Father: You are not stupid.

Son: Yes, I am.

Father: You are not. Remember how smart you were at camp? The

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counselor thought you were one of the brightest.

Son: How do you know what he thought?

Father: He told me so.

Son: Yeah, how come he called me stupid all the time?

Father: He was just kidding.

Son: I am stupid, and I know it. Look at my grades in school.

Father: You just have to work harder.

Son: I already work harder, and it doesn't help.

Father: You are smart, I know.

Son: I am stupid, / know.

Father: (loudly) You are not stupid!
Son: Yes, I am!
Father: You are not stupid, Stupid!

Ginott goes on to explain:

When a child declares that he is stupid or ugly or bad, nothing that we can say or do will change his self-image immediately. A person's ingrained opinion of himself resists direct attempts at alteration. As one child said to his father, I know you mean well, Dad, but I am not *that* stupid to take your word that I am bright.

Reassurance is a way of seeming to comfort another person while actually doing the opposite. The word *comfort* literally means "strengthen by being with." Reassurance does not allow the comforter to really be with the other. It can be a form of emotional withdrawal. Reassurance is often used by people who like the idea of being helpful but who do not want to experience the emotional demand that goes with it.

Roadblock number thirteen:

When people are introduced to the roadblocks, a fairly typical reaction is, "That's just what so and so has been doing all these years! Wait till I tell him about all the roadblocks he sends." This is Roadblock Thirteen: telling other people they are sending roadblocks. Roadblock Thirteen belongs in the judgment category. If we want to improve our communication, pointing the finger of judgment at others is a poor place to begin. Once we start seeing the roadblocks that we have been sending, we can work to withdraw our *own* roadblocks to communicating.

Communication stoppers:

Commonly used phrases that stop communication:

"We tried that idea last year and it didn't work."

"Yes, but . . ."

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This often becomes a habitual response to others' ideas. The "but" negates whatever was said before it. It has the effect of rendering powerless the person who spoke first.

"She'll never change."

People are always changing.

"We can't do that, he'll have a fit."

It's easy for a group to be paralyzed for fear of an emotional outburst. It is often the case that when one person says the truth in the face of a threat, the group becomes freed up.

"Many people are saying . . ."

This initiates a very powerful and persuasive statement. It sounds as though the masses are grouped behind the speaker. More often than

not, it's only really referring to one or two people. Be sure when you hear it to ask, "How *many* people?"

You can add the communication stoppers you've noticed.

PERILS AND PITFALLS IN THE SEARCH PROCESS

The following material has been collected by a large group of “sadder-but-wiser members of religious organizations. These are pointers/warnings about group dynamics, which may be evident in the search process. The dynamics that appear in a search process are probably also present in the group’s ongoing life.

Beware if:

1. Your Sangha Profile or group does not mention any of the “challenges,” “growing edges,” or struggles of the group. You may be in denial about your issues, or are in the habit of putting a mask up about who you really are. [The search process, to work, is one of open, honest, mutual sharing of information.] Be aware especially about how you have handled conflicts.
2. Your group refuses external consultation and guidance. As one indicator, notice if you have actively welcomed and followed advice throughout your search process.
3. There is active hostility or hostility toward your parent organization (e.g., SFZC). Ask why you have this feeling. If your response seems over-reactive, such hostility is often a sign that your group has adolescent traits (resistance to authority, refusal to be accountable, pre-occupation with self, arrogance about self-sufficiency, etc.) [Someone has described it as, “I hate you, I hate you. Can I have the keys to the car?”]
4. Your Profile or group talks primarily about what is expected of the new Teacher, with little or no mention of what the new Teacher can expect from your group by way of support and participation in getting those goals achieved. If your group thinks of the Teacher as “doing this for us” rather than “leading us to take responsibility for our life together,” beware. Frustration and burn-out are ahead for the Teacher.
5. There is evidence (in conversation, in financial reports, in interviews, in the Profile) that you are trying to get a new Teacher as cheaply as possible. If you have financial problems, you must be open about those with candidates. Determine how you PLAN TO ADDRESS THOSE ISSUES, and *not* just relying on “the new Teacher will bring in new money.” Especially beware of offering assurances that “we will increase your salary when you bring in all those new people.” New Teachers who have fallen for that promise have been disappointed to find that the group would rather do something else with their money than care for the Teacher. Let prospective candidates look carefully at your financials to determine what’s really going on. The search committee persists in using corporate business language (“contract,” “employment,” “hiring,” etc.). The relationship between your

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6. Sangha and Teacher should be based in zazen and founded on principles of discernment, mutual leadership review, vocation, and trust.

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HOW TO EVALUATE A DHARMA TALK

Immediately following the talk make brief notes or circle appropriate items in the criteria boxes. Circle the number to indicate a low score (1) or high score (5) in the category.

1. Audibility

| 1 | 2 | 3 | 4. | 5 |
|--|---|---|----|--|
| Too quiet, inaudible, mumbling, trailing off sentence endings. | | Audible, but affected accent/ tone that detracts. | | Consistency of audibility with appropriate inflection. |
| Too loud, yelling. | | Mixture of adequate with some poor quality. | | Easy to listen to. |
| | | Acceptable, but not inspiring. | | |

2. Nonverbal Communication: posture, hand gestures, and eye contact

| 1 | 2 | 3 | 4. | 5 |
|--------------------------------|---|---|----|--|
| Posture stiff and distracting. | | Acceptable, some inconsistency. | | Appears relaxed and comfortable. |
| No hand gestures. | | No distractive gestures, but minimal positive gestures. | | Hand gestures emphasized point. |
| Distractive hand gestures. | | Relaxed posture, but no eye contact. | | Relaxed eye contact with most listeners. |
| No eye contact with listeners. | | | | |
| Stares at just one person. | | | | |

3. Speaking Style: ability to establish rapport with listeners.

| 1 | 2 | 3 | 4. | 5 |
|---------------------------------|---|----------------------------------|----|---|
| Reads script verbatim. | | Acceptable, but not captivating. | | Script does not interfere with rapport. |
| Doesn't use script but rambles. | | | | Effective extemporaneous style. |
| Minimal rapport with listeners. | | | | Consistent "contact" with listeners. |
| "Loses" listeners. | | | | |

4. Organization of Presentation: Note: this is largely independent of content and appropriateness of presentation. Is there a clear opening, middle and conclusion without inappropriate repetition, distraction, and/or discordance? Is it neither too short nor too long?

| | | | | |
|---|----------|---|---|----------|
| 1 | 2 | 3 | 4 | 5 |
| Rambling, repetitive, needless digressions. | | Acceptable; has opening, middle, and conclusion. | Creative but not excessive use of discord. | |
| Abrupt transitions and conclusions. | | Generally good, but requires some energy to follow and sustain attention. | Presentation easy to follow, coherent with smooth transitions. Good length, (Note: a good talk may seem short.) | |
| Too long, too short. | | | | |

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5. Content of Talk: *balance between academic and personal perspectives, use of humor, and texts.*

| | | | | |
|--|----------|--|---|----------|
| 1 | 2 | 3 | 4 | 5 |
| Entirely academic with minimal personal relevance. | | Acceptable, but imbalance may detract from overall presentation. | balanced academic and personal perspectives. | |
| Speaker gets lost in own personal material. | | | Use of humor and other stories enhances presentation. | |

6. Appropriateness of Content: *talk appropriate and relevant to the listeners.*

| | | | | |
|---|----------|---|---|----------|
| 1 | 2 | 3 | 4 | 5 |
| Content entirely inappropriate for listeners. | | Content appropriate and relevant for listeners. | Content highly appropriate for listeners. | |
| Content not within general teaching of Zen. | | | | |

7. Creativity and Imagination:

| | | | | |
|--|----------|---|---|----------|
| 1 | 2 | 3 | 4 | 5 |
| Talk lacking any originality, creativity or imagination. Boring. | | Acceptable, "solid". | Presentation and content contains degree of creativity that captivates the imagination of the hearer. | |
| Excessively creative that detracts from message. | | Presentation was not boring, but showed only minimal originality. | "Hearing the old story" in a new way. | |

8. Authenticity of Speaking: *a global assessment of the congruency between what the speaker says, how they say it, and the manner in which they live or embody the message.*

| | | |
|--|--|--|
| <p style="text-align: center;">1 2</p> <p>Inauthentic, phony feeling. Affected pronunciation.</p> <p>Speaking down to listeners.</p> <p>Not indication that speaker lives or believes their own message.</p> <p>Speaker appears personally uninspired.</p> | <p style="text-align: center;">3</p> <p>Acceptable, but not inspiring.</p> <p>Presentation may appear genuine, but without enthusiasm.</p> <p>Excessive enthusiasm that detracts.</p> | <p style="text-align: center;">4 5</p> <p>Speaker embodies the message.</p> <p>Congruency between message, manner of presentation and personal references.</p> <p>Speaker expresses enthusiasm for teaching and living the Dharma.</p> |
|--|--|--|

A MODEL DRAFT LETTER OF AGREEMENT

Introduction

Within the corporate business realm, many things have been learned about jobs and vocations. Some of those things have application to how clergy do their work in their very particular institutional setting. The concept of "contract" is one of those things. Being the Teacher, or Abbess, or Abbot of a Zen Temple is not just a job. There are not many people who would take it for the pay and prestige alone. Although the work has hard, slogging, tough, complex things to be done, all those things exist within a framework of meaning that comes from a sense of commitment to the Dharma and serving others. Of course, anyone, doing any work, who has this sense of meaning and purpose is probably living out their vocation.

For a person to be a fully qualified teacher he or she must have received Dharma Transmission from his or her teacher. Through this ceremony he or she becomes an "authorized teacher for the world to proclaim the Dharma to all sentient beings" (from the Dharma Heritage Ceremony of the Soto Zen Buddhist Association).

What this means, then, is that when a fully ordained priest is called, that individual comes on board with certain accountabilities beyond the local Sangha in that he or she has taken a blood oath to preserve and transmit the traditions and teachings of his or her lineage. It also means that the salary and benefits must be seen in a new light. The financial "package" is not something offered as an incentive for good work; incentive is already built into a healthy vocation. Rather, think of the package a support system provided so that the priest is reasonably free to pursue his or her vocation with personal dignity. If it is inadequate, it can be experienced as demeaning and thus become a disincentive. If it is right, even generous, it will provide the support, but won't function as an incentive. Clergy are quite aware of that distinction and usually avoid talking about "salary." The term "stipend" feels better to many. This also explains why many clergy are offended at performance reviews tied to salary adjustments. The two do not go together.

The point of this is that you are calling a priest to be your teacher – not hiring one. If this distinction is not deeply appreciated you may find yourself insulting prospective nominees, for they will be uncomfortable being seen or treated as hirelings. They know the difference. Calling a teacher is more like proposing marriage than hiring a CEO. The teacher and Sangha then enter into a relationship wherein both parties are expected to do everything possible to make it work for the good of the overall life and practice of the Sangha. Furthermore, the Sangha can't simply "fire" the teacher if things aren't going well. Experience has shown that getting out of this relationship is much like a divorce; it's not easy and very often painful. The rule of thumb is that this relationship can be dissolved

by mutual consent or by arbitration and decision.

It is clear in what we have learned about work and how men and women relate to their work, that increased clarity about expectations can be very helpful in building accountability between those who work together or for one another. Some of the unhappiest working situations are those in which one or more people in the work setting are continually being surprised by the others. They do not do what others thought they were going to do; they do not do it in the time frame that others needed them to have it done in; or they do it in quite different ways than others expected.

Deciding to have a Letter of Agreement signifies a desire for a different kind of collaborative leadership, not denying the special character of the Teacher's leadership. Where collaboration is desired, some work on how that collaboration is to work is essential.

Because of that, it becomes important in any situation in which people work together for there to be some process of talking about what each will be doing, making agreements. A letter of agreement is a tool for mutual service. Two other tools are position description, and periodic mutual review. When all three are used—letter of agreement, position description, and periodic mutual review—Teacher and community can choose better directions for their mutual service, and so support one another in common endeavors.

What follows is merely a guide, a set of suggestions and reminders, not a rigid blueprint.

It includes many points that need to be taken into account, things to look for, things to be sure you talk about, options that others have considered important.

The Letter of Agreement should be supplemented by a Position Description, to specify professional and sociological dimensions that are beyond the scope of the Letter of Agreement.

All agreements must be subject to revision—after living in one set of agreements for a while you always discover that new things have occurred leading to a need for new agreements.

(The Letter that follows applies where the Position Description has been written before the parties negotiate a Letter of Agreement. When there is no pre-existing formal Position Description, it is then useful to write one after the parties have had time to experience each other's work.)

A MODEL LETTER OF AGREEMENT

between

The Board of the (name) Zen Center

and

(NAME)

who has been elected Teacher (Abbess, Abbot) with the understanding that this tenure is to continue until dissolved by mutual consent or by arbitration and decision.

The Teacher shall lead and support the Dharma practice of _____ Zen Center as priest and teacher. This role will be further described in a Position Description, which meets the mutual approval by the Teacher and Board, to be completed in preliminary draft form within three months of practicing together, and to be reviewed and revised within one year of their practicing together. The preliminary letter of agreement is intended as a “starting point” to begin an ongoing dialogue between the Teacher and Board, with the intent to clarify the roles and responsibilities of each, and to develop mutual expectations. The preliminary letter will not be considered part of the Letter of Agreement, but rather as a draft in progress. When the final Teacher Position Description has been thus completed, it shall be considered a part of this Letter of Agreement, to be reviewed annually by the Teacher and Board.

Section A. Times of Work & Leave

(1) The Head Teacher’s work includes not only activities directed to the Center and its well-being, but also labors on behalf of the local community and larger Buddhist community. The Teacher's scheduled workweek is five days, usually measured as ten to twelve units of mornings, afternoons, or evenings in various combinations reflecting the demands of this vocation. In general, no more than three evenings per week are expected. The Teacher is expected to preserve at least two continuous twenty-four hour days each week solely for personal and family use, with an emphasis on personal renewal.

(2) The Teacher will have the following periods of leave at full compensation:

(a) National Holidays, to be taken so as not to interfere with ceremonies for major occasions.

(b) One month Annual Vacation, consisting of twenty-three workdays, which

shall include five Saturdays. No more than 6 workdays and one Saturday may be carried forward to succeeding years.

(c) Professional Development Leave, at the rate of two weeks per year.

(d) Three weeks per year for Sabbatical Leave, to be available after the third year, and cumulative through the sixth year. Sabbatical arrangements shall be made in full consultation with the Board, to insure benefits for the community as well as for the Teacher.

(e) Four weeks Parental Leave for the period immediately surrounding the birth or adoption of a child to the Teacher/Teacher's partner, beginning at a time decided by the Teacher, in consultation with the Board.

Comment:

The emerging consensus is that short sabbaticals (lasting two to four months) contribute strongly to effective total service. Length of sabbatical is only one issue which must be discussed well in advance by the Teacher and Board. Other issues include:

— *Additional costs to community during sabbatical for supply clergy, etc*

— *The Teacher's re-entry into the community at sabbatical's end.*

— *An understanding of how the proposed sabbatical will benefit not only the Teacher but the whole community.*

— *Plans for communicating the fruit of the sabbatical to the community.*

Section B. Compensation

(1) The Teacher's annual cash stipend will be \$____per month, paid monthly on or before the 15th day of the month, to be reviewed and adjusted annually. As a condition for employment, the Head Teacher has agreed to live in Zen Center housing, with taxes, insurance and utilities paid for by AZC. The Board will designate a portion of the total cash stipend as "Housing Allowance" under the Federal Internal Revenue Code.

(2) The Teacher shall receive SECA Reimbursement payments, quarterly before the 15th of April, June, September, and December.

Comment:

Allowable housing expenses include: rental or mortgage payments; tax, utility, and insurance payments; maintenance, decoration, and capital improvement costs, whether for the basic structure, for furnishings, or for grounds.

The Housing Allowance is normally a designation of a portion of the priest's total salary. It represents no additional expense to the community; in tax accounting terms it is a salary reduction.

Center-provided housing is often assumed to be part of compensation. The cash portion of the compensation is then referred to as "cash stipend".

The Self-Employment Contributions Act (SECA) places a heavy burden on clergy by taxing them for Social Security at the high rate for Self-Employed persons, while

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exempting Centers from the usual Employer's share of SECA payments. To

remedy this inequity, it is the practice in many places to give the clergy SECA Reimbursement payments. Formulas for such payments vary. Three common ones are:

- 1. Complete reimbursement for all SECA payments made by the clergy.*
- 2. Reimbursement of the amount the congregation would have to pay were it not for the special SECA treatment of clergy.*
- 3. Reimbursement of the difference between SECA payments that would be made as a regular employee, and the payments actually made under the clergy's special SECA status.*

(3) _____ Zen Center will provide Health and Hospital Insurance (HHI) for our Head teacher. If equivalent or better HHI is provided independently through the employment of the Teacher's spouse, the Teacher may waive participation in the Center's HHI plan. The Board will then not provide duplicate coverage but will use the amount of the Center's HHI premium to provide a non-income benefit of similar cost. If at any time the Teacher revokes the waiver, the Board will provide HHI in accordance with the Center's plan.

In the event that the Teacher _____ Zen Center is unable to perform his duties due to long-term illness or disability, _____ Zen Center will continue to provide room, board, stipend and HHI until long term Social Security disability insurance applies.

(4) _____ Zen Center also aspires to create a pension fund assessment in the sum of the Teacher's total annual cash stipend (including Housing Allowance) plus the Teacher's SECA Reimbursement. However, since we had not anticipated this expense in the current budget year, we will have to revisit this topic when preparing the (year) budget.

Section C. Expenses

The Board shall pay the following expenses incurred by the Teacher in fulfilling the duties of office:

- (1) Availability of a car to be owned, maintained and operated at the expense of the Sangha; plus out-of-pocket costs of parking fees, tolls, bus fares, etc.
- (2) The normal expenses of the Center's office operation, such as telephone, postage, office equipment, supplies, secretarial services, etc.

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(3) An expense allowance of \$_____ in (year) for reimbursement of expenses incurred in the course of professional activities on behalf of _____ Zen Center.

Pre-approved expenses include but are not limited to: official entertainment of Sangha members and Center guests, such as a visiting teacher; dues to professional associations; subscriptions to professional journals; purchase of clerical garb; child care when both Teacher and spouse are expected to be present at some Center event.

(4) The cost of a cell phone whose telephone number shall be published to insure the Teacher's ready accessibility in case of emergencies. The Teacher shall pay the cost of all personal long distance calls or "roaming" calls.

(5) A Professional Development Allowance of at least \$_____ per year, to be reviewed annually, set aside in a special account, and paid to or on behalf of the Teacher toward expenses incurred in relation to professional development leave. Unexpended portions of this allowance shall be allowed to accumulate for use in succeeding years up to six years.

D. Supplementary Compensation

The Teacher shall not charge fees for performing any ceremonies of the Center (for example, well-being, marriages, funerals) for members of _____ Zen Center. However, the Teacher is welcome to accept any honorarium that the member(s) wishes to present to the teacher as an act of gratitude and expression of generosity.

The Teacher may, however, receive income from other sources, such as:

Ceremonies on behalf of persons not in any way related to the _____ Zen Center.

Fees and honoraria for professional services performed on personal time for groups unrelated to _____ Zen Center, or for talks, books or articles published outside the Center.

For tax accounting purposes the Teacher must keep a record of such supplementary compensation. The Teacher agrees to make that accounting available to the Board upon request.

Section E – Use of Buildings

In addition to use and control of the Center's buildings for the discharge of the duties of the Teacher's office, the Teacher shall have the right to grant use of the

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buildings to individuals or groups from outside the Center, following guidelines approved by both Teacher and Board.

Section F – Mutual Leadership Review

The Teacher and Board agree to an annual discussion and mutual review of the total life and practice of the Center, in order to:

Provide the leadership of the Center, the Teacher and Board, opportunity to assess how well they are fulfilling their responsibilities to each other and to the practice they share.

Establish goals for the work of the Center for the coming year.

Isolate areas of conflict or disappointment that have not received adequate attention and may be affecting mutual leadership adversely.

Clarify expectations of all parties to help put any future conflicts in manageable form.

The Teacher and Center agree to enter into this mutual discuss with the desire to praise successes and review potential areas for future growth. This annual discussion will be facilitated by a mutually agreed upon, impartial “third party” trained in the art of facilitation and meditation. Under no circumstances will this review process be linked to the Teacher’s stipend, since this review is not intended as a “performance” review, but rather as a process of mutual discovery and growth for both the Board and the Teacher.

Section G – Other Agreements

(1) All reasonable and customary moving and travel expenses incurred in moving to the _____ Zen Center shall be paid by _____ Zen Center.

_____ Zen Center shall also reimburse the Teacher for all additional Federal and State Income Taxes which may result from such expense reimbursement.

(2) All pay and benefits shall become effective on _____.

(3) This Letter of Agreement, and its related Position Description, shall be made part of the minutes of the next Board meeting following its signing, and copies shall be given to each new Board member who joins the Board in the future.

(4) In the event of the Teacher’s death, the Board agrees to continue to provide the Teacher’s surviving direct dependents with the Teacher’s cash stipend and the use of the Teacher’s residence as agreed to in Section B, and appropriate

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Health and Hospital Insurance, for a period of up to 12 months, or until the dependent(s) notify _____ Zen Center that they no longer require this support. Continued use of the Teacher’s residence beyond this 12-month term shall be

subject to agreements entered into during the term.

(5) The Teacher agrees to abide by the current Code of Ethics of the _____ Zen Center.

(6) This letter may be revised only by mutual agreement at the time of the annual mutual leadership review, except that compensation and expenses revisions may be mutually agreed upon in a separate budget process.

(7) If the Teacher and Board are in disagreement concerning interpretation of this Letter of Agreement, either party may appeal for mediation to a mutually agreed upon third party.

_____ _____
Date *Teacher*

President of the Board

GUIDELINES FOR A MUTUAL LEADERSHIP REVIEW

One way or another it happens. Review and evaluation always go on at the informal level. In addition, many Teachers and Sanghas have struggled to develop helpful ways to approach a mutual review at the formal level.

There is useful ferment in the field; no single model for this kind of review seems to satisfy the varying needs of Teachers and Sanghas wanting to engage in it. Nevertheless, some lessons have emerged as general principles to be applied to particular cases:

1. Intentionality

It is more constructive to plan for regular, formal review than to wait for events and evaluative pressures to overtake persons involved in Sangha leadership.

2. Mutuality

Review is best understood as an exercise in mutual sharing, not an adversarial event. To look at a Teacher's performance in isolation from that of the Board's, or *vice versa*, encourages defensive, win-lose behavior and feelings.

3. Consultation

Mutual review is generally easier and results are better when a consultant from outside the Sangha assists the process. The consultant should be a long-term practitioner, knowledgeable about Sangha life, and skillful in working with groups.

4. Continuity

The review must be set firmly in context. Particulars vary from Sangha to Sangha, but always include: the Buddhist understanding which undergirds practice and mission in that Sangha; position descriptions of the parties involved; report of the last review, including goals which it set; major events in the life of all parties since the last goals were set.

5. Variety

There are many ways to do a mutual review. Data can come from routine Sangha records, or from special surveys and questionnaires, or from the impressions of a number of selected persons. The review team can be composed in many ways: a special committee of leaders; the Teacher and Chair and vice-Chair of the Board; the Board acting as a committee of the whole. Performance goals can be as varied as the sum of the activities and dreams of the whole Sangha, or as singular as "the most important project in our life together". No one method is correct for all circumstances.

Many people agree, however, that it is interesting and productive to change approaches every few years.

6. Simplicity

It is wise to aim for simplicity: only a few goals held up for formal review at each evaluation cycle; performance measurements that are easily administered and clearly understood.