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December 30, 2018

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SHAMBHALA

Dear Shambhala Sangha,

As we finish our second month of work, we are writing today to update the you on what decisions we have made, how our projects and meetings are progressing, and what other reports you can expect from us in the near future.

Since we took our seats in October, the Interim Board (IB) has met twice per week as a full group, and our subcommittees meet weekly in the areas of finance, communications, development, legal and community care. This update contains reports from several of these subcommittees.

Along with this update, we are providing all members with a link to view a recording of our December 16 webinar with Shambhala leaders in its entirety (90 minutes). Please see below for more information and the link to access the recording.

Board Decisions

The Interim Board (IB) is committed to transparency. It is our wish to keep you apprised of our work and decision-making. Since our last update, we have made key decisions in the following areas:

- We agreed to strengthen the current Care and Conduct Policy and Panel by stating that the Panel will review claims occurring before 2002 and, second, will review claims where a current leader may not have been in their position at the time of the claim. We launched an application process to add two members to the Panel, in particular, looking to add people outside of North America. A dedicated

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- The Wickwire Holm investigation report, expected in January 2019, will now be issued directly to the IB instead of to Shambhala's legal counsel. Please see below for further details about this decision.
- In an effort to connect with local communities, all IB members and Shambhala Global Services (SGS) staff will personally call all worldwide centers and groups. This outreach will include discussion about the status of each center, an update about the work of Global Services and the importance of all centers contributing to SGS.
- In the late fall, Ryan Watson retired as Director of Finance. David MacLellan has agreed to assume a greater role within the Finance Department. We appreciate all the work that Ryan has contributed and look forward to working with and supporting David.

Finances

Presently, the IB Finance Committee is examining the reporting of income and expenses in order to make better decisions. We have been working with the Potrang to allocate expenses and services more efficiently between the two organizations. [Please click here](#) for the December Finance Update explaining the issues we have found and the principles that will guide our decisions forward. We expect to publish a financial plan and budget for the organization by Shambhala Day 2019.

Wickwire Holm Investigation

The IB Legal Committee has taken direct responsibility of the Wickwire Holm attorney engagement for the investigation. Once the investigator's report is complete, it will be issued directly to the IB instead of Shambhala's legal counsel. Doing so allows the IB to have direct oversight of the Wickwire Holm investigation. That said, we have not changed the terms or scope of the investigation which is being independently conducted. The deadline for claimants to report harm was November 16th, and the investigator is in the closing stage of interviews. Wickwire Holm has told us

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confidentiality, the IB will likely publish the report as we receive it from Wickwire Holm.

An Olive Branch

As we previously reported, An Olive Branch will continue to provide listening services and support for those who have experienced harm in our community until December 31, 2018. These services are available to the sangha by contacting ListeningPost@An-Olive-Branch.org. Information on how this process works and the approach An Olive Branch will take to listen and support reporters [can be found here](#). In January, An Olive Branch will provide an update of their progress to the IB and give us a better sense when their report will be ready. Like the Wickwire Holm report, is our intention to pass on the Olive Branch report to the sangha in its entirety, again subject to issues of confidentiality.

Care and Conduct

An expanded version of the Care and Conduct Policy has been written and distributed to the community. Here is the [IB letter explaining changes](#) and here is the [updated policy document](#) (available now in English and Spanish, more translations will be available soon). Please note that you will need to use your Shambhala member login to access the policy document. Working with the Care and Conduct Panel, we are also starting an application process for two new panel members, with a goal of adding members outside North America. [Please click here for the application](#). We intend to distribute the Code of Ethics, which was written by An Olive Branch with the Code of Ethics group, when the Process Team is seated. We expect the Process Team to take on the work with the community to review what new or updated policies, guidelines and procedures around care and ethics are needed for the future.

IB In-Person Meeting in Halifax

From December 6-9, the IB met in-person in Halifax. This was the first time many of us had met in person. It was a very busy time meeting with the Finance Office, the Potrang, Practice and Education staff and Acharyas, the Development Director, Communications Director, Kalapa Media, Wickwire Holm and of course each other. We attended a community reception at the

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welcome and received a tour of the Shambhala Archives. It was very helpful and heartwarming to meet each other in person.

Meeting with the Sakyong and Sakyong Wangmo in Halifax

The IB was invited to the Halifax Court for tea on Saturday afternoon, December 8th. We introduced ourselves to the Sakyong and the Sakyong Wangmo and had an opportunity to meet and speak with each of them briefly. This gathering was a social one and not a business meeting. The Sakyong expressed his support for the IB and indicated his interest in communicating with us as we continue our work.

Webinar

The IB conducted a webinar on Sunday, December 16 with approximately 100 community leaders worldwide. We introduced ourselves and gave updates in several areas including the Wickwire Holm investigation, the Process Team selection, finances, our Halifax trip, and Care and Conduct. Ashley Dinges, Communications Director, presented a short report about the Sakyong's activities. [Please click here](#) to view the webinar in its entirety including the Q&A. We intend to have ongoing webinars with leaders, and plan to continue distributing these recordings to the community.

Upcoming Communications to the Community

January

- Wickwire Holm Report
- Olive Branch Report (If completed)
- IB Financial Plan
- Information about Shambhala Day February 5th Year of the Earth Boar and Fundraising Efforts

We continue to read and consider all of your emails. You can always contact us at board@shambhala.org or visit our website at

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regularly and to receiving your feedback.

Yours in the GES Vision,

The Shambhala Interim Board

Veronika Bauer

Martina Bouey

Mark Blumenfeld

John Cobb

Jennifer Crow

Sara Lewis

Susan Ryan

Paulina Varas

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