

TO: THE ANGELL FOUNDATION

FROM: ZEN CENTER OF LOS ANGELES
WENDY EGYOKU NAKAO, ABBOT

RE: SPIRITUALITY INITIATIVE FOR ORGANIZATIONS: Report on Last Quarter
of Project, August through October, 2008

DATE: December 31, 2008

Our project, called “Under the Bones of the Master”, is an inquiry into wisdom-based leadership, shadow and gender.

Pursuant to our original Program Description and since the Three Month Progress Report and Six Month Interim Report which we submitted to The Angell Foundation (“TAF”), we have completed and or initiated the tasks described below. Additionally, Roshi Wendy Egyoku Nakao, Jeanne Dokai Dickenson, and Patti Muso Giggans attended the inspiring and informative Angell Foundation’s forum on July 31 and August 1, 2008.

The first two inquiry sessions were reported in the Three Month Progress Report, and the subsequent four inquiry sessions were reported in the Six Month Interim Report. Copies of these are enclosed with this Year-End Report. Since that time, we held our final sessions on August 10, 2008, September 14, 2008 and October 12, 2008. The participant commitment level was sustained at 44 persons throughout the entire inquiry. Individual commitments for financial support for the program have been fulfilled by the participants.

- The August 10, 2008, session, led by Roshi Wendy Egyoku Nakao, was a key session in the nine-month inquiry. We leaped forward from the evolving awareness emerging through our inquiry to what Roshi described as “collective awakening”. Discussion comments involved, as a threshold matter, how we know when it takes place, and whether it may regress. Is collective awakening a single identifiable process, or the continuous unfolding of a practice community as it matures? Roshi communicated that a sangha of people each individually on a path to awakening is a first step, but we cannot stop there. There is a leap to be made beyond individual awakening to everyone awakening together. Collective awakening (which is what we mean, ultimately, by Sangha) means that the community is the key to transformation for everyone to awaken together—that we are all invested in the awakening of everyone together, not just in our own awakening in the company of others. Communities awakening together can trigger other communities to awaken. What are the structures—the forms—awaiting our creation or discovery that will serve this collective awakening?

- The September 14, 2008, session featured two special guests. We paused for a session to attend to two important areas that are part of the environment of the grant. First, Rigoberto Rodriguez attended with an assistant to conduct an assessment on behalf of TAF on how our initiative has impacted the participants, individually and collectively. (We have not seen these results. See also Leah Ersoylu's evaluation work, item 4 below). Second, we were fortunate to have as our special guest Perry Oretzky, who spoke with us about Lynn and David Angell, and the evolution of The Angell Foundation, including the spirituality initiative. We were moved to notice that the values of Zen practice are in accord with the Angells "right thought, right speech, and right action" as expressed by Perry.
- The October 14, 2008 final session was led by facilitators Rose Pinard and John Ott. Given the leap to collective awakening made by the group in August, Rose and John were invited by Roshi Nakao to shift their roles from allies to facilitators for this class. They ably led us in an exploration of the concepts of collective wisdom and collective awakening.

With respect to progress toward our goals, the model for our inquiry, arising out of the Three Tenets as our container, is process-oriented rather than objective-oriented.

This process has enriched growth and expansion toward the five-fold goals of the inquiry:

- a) identifying the principles of feminine and masculine wisdoms
 - b) exploring the differences among these styles and their variations
 - c) exploring how our understanding of spirituality in organizations is influenced by these styles
 - d) recognizing and evaluating how the Center manifests and incorporates these wisdoms
 - e) developing a plan to incorporate new avenues of working together
2. Our plans, timeline and approach remain consistent with our original proposal. We have made some budget changes in response to the increased number of participants, from 30 to 44 (see budget discussion, below). Additional changes have been made to make optimal use of the contributions available from our own resource pool as presenters, reducing our reliance on outside presenters. Consultants Rose Pinard and John Ott have served as allies to our process as well as to Roshi Nakao. Their expertise in and commitment to collective wisdom is in alignment with our work. As of May, Rose is the primary ally. Her main functions are to "stand with" the group as a witness during our sessions and to offer witness comments. Both Rose and John have been especially helpful in identifying issues through guiding questions.
 3. The response of participants thus far has been active and enthusiastic. The best evidence of this is that there has been virtually full attendance at all sessions (which

are three to four hours in length and held on Sunday afternoons). Additionally, we have established an email group for participants. After each session, Roshi Nakao has posted notes and reflections on that session, and many of the participants regularly post observations, concerns and reflections to the email group. Please see Schedule A, attached, for examples of participants' shared thoughts.

4. The inquiry itself—spiritually, emotionally, mentally and even physically at times—is our chief challenge. Our experience is positive overall, and we have not encountered setbacks or conflicts in connection with our inquiry. We have benefitted from the participation of our project consultants, Rose Pinard and John Ott. We have been in frequent contact with TAF's external evaluator, Leah Ersoylu, by telephone, by sending her some publications corresponding with the inquiry, and by connecting her with inquiry participants to interview for her reporting function.
5. Please see Schedule B, attached, for the year-to-date budget report showing project actuals for each line item, as compared to our revised budget.

The initial budget was revised to accommodate the added expenses and preparations for the program resulting from the increase in the number of program participants from the originally anticipated 30 persons to the 44 persons currently participating.

Thus, the amounts attributed to Personnel Costs were increased by \$4,580 (to a total of \$30,770), reflecting the additional planning and preparation time expended by the Project Leader/Abbot, the Program Steward, the Abbot's Assistant and the Business Manager. The budgeted amounts for Seminar Meals/Snacks and Seminar Supplies similarly had to be increased (by \$200 for each of these budget item, to \$1,550 and \$1,000 respectively). Additionally, because we have found the participation of Rose Pinard and John Ott to be valuable, we increased the budget item for Project Consultants by \$1,500 (to a total of \$6,225).

In order to accommodate these increases, we reduced the budget items for outside Presenters by \$4,500 (to \$3,000) and Travel by \$3,000 (to \$500).

Respectfully submitted,

For the Inquiry Advisory Group

Schedule A

Examples of participants' observations, concerns and reflections, posted to the group email.

Please note that each of the excerpts from the group email postings is by a different individual. These examples were posted at various times during the course of the project and have been placed in approximate groupings.

Definitions of Leadership

"I think a good leader has a "compass" in his/her head, removes roadblocks so the people can do what they have been asked to do but most important is a developer. A good leader wants to see his/her people grow and hopes they will discover their potential."

"My experience has been that the typical leadership trainings only work to a point, and not a very high point, especially when it comes to "higher" leadership styles. If the underlying developmental maturity is not there, nothing much will happen or change in terms of how the person functions. One thing I did notice though, is that people who had a contemplative practice of some kind usually had a leg up on others because they were more self aware, able to describe what they did and how they did it. Such self-awareness is essential if we are to grow; it is the first step in the change process and not much happens without it. So, in that regard, our practice is a natural and wonderful ground in which to grow our leadership!"

I equate leadership with maturity. In my view, a leader is a person who has grown into being a fully mature adult (or close to that). Someone who can set aside their own reactions and listen. Someone who can cut through stories, their own and those of others, and see as is. Someone in whom appropriate action regularly arises. At my office, people who have these qualities I respect as leaders. People who don't, who happen to be in supervisory positions, I don't view as leaders."

"Where does a leader receive the authority to lead? We can say the position, the leader's skills, knowledge and experiences but never forget the authority to lead many times comes from those that are led. This was a lesson I learned the hard way."

Fear of Leadership

"When not caught in my conditioning, when I let go, then leadership for me is holding the bigger picture, keeping the group out of the weeds, and listening, listening, listening. I've experimented with being willing to voice confusion and uncertainty to see what that brings out of others. It's become as though I flip a switch and move from functioning from fear (mastering, avoiding, working from a power dynamic) to being fully present (big picture, listening, making room for

questions). But getting there means bringing out and greeting the fearful person hiding under the bones of leadership.”

“The idea of expressing myself or my deeply held beliefs so forthrightly scares the hell out of me—because no matter how calm and confident the messenger, the truth is often received as a challenge to someone somewhere and I feel almost physically incapable of putting myself in that line of fire or ‘causing’ someone to feel uncomfortable and so I refrain.”

“I am no longer fulfilled or served solely by asserting that my anger is a human right, is just. I am working now for the right to heal and be free from it, to recognize that it is something I own and is a part of me that I can transform. I no longer want to feel victimized either by patriarchy or by my own anger against it, constantly keeping one fist clenched in anticipation that someone will try to erase me again.”

“This is what I believe: if we don’t access our deepest wounds and also show them to others in which we trust that they help us heal, we will not heal, but the wound will grow and take over the whole. And I also see it as our biggest strength, when we have the courage to rip off the bandage and show our vulnerability and wounds to those we trust.”

Working with Leadership

“These are the contradictions I find challenging to work with—people come from such different places and differences are very difficult for me to understand and embrace when they run counter to my experience and what I think is the best course of action. I am incredibly judgmental and what’s good for me isn’t necessarily good for another and I think that’s really hard.”

“I’ve also come to realize that just because I know the “right” answer doesn’t always mean it’s the best solution. Leadership is very difficult. It takes a lot of good discernment to be effective.”

“Regarding myself as a leader, I think the main issue is pretty much the same as in other domains of my life: how to take it seriously without making it about my worth; essentially whether I have a right to be here at all. That kind of weakness is easily sensed.”

“I tend to make decisions from my gut or my (feminine?) intuition, after reviewing facts, etc. And I am pretty clear that the decisions made from that place tend to be right-on. However, I perceive leaders as being rational, logistical decision-makers and don’t trust my own style when I am in a position of leadership.”

Maybe just the reassurance that we don’t get rejected and ridiculed when we speak and act against the expectations—unwise, emotional or insecure—will help a lot.”

“Leadership-followership/followership-leadership is an interdependent partnership. Having been both in different contexts has challenged my self-reflective capacities at deeper and deeper levels of body experience and emotional/mental life. Most recently it has included being in a partnership with a colleague—which requires each of us to “follow-lead/lead-follow”, paying

close attention to our own and the other's initiations and responses from moment to moment; meditate, reflect and dialogue together; and make accommodations to each other in a compassionate and self-respecting way. I have had to continually confront disowned parts of myself that were embedded in a web of energies of afflictive identifications arising from childhood experiences."

Schedule B

Zen Center of Los Angeles
Angell Foundation Grant
Revised Budget
And Year-to-Date as of June 30, 2008

The budget revisions are the result of a larger than anticipated group of inquiry participants—44 rather than 30. For each budget item below, the first amount shown is the initial budget item amount, the second amount shown is the revised budget item amount, and the third amount is the year-to-date expenditure for the total (for the Personnel Costs category), and for each budget item (for the Other Operating Costs category).

Personnel Costs

Project Leader/Abbot:	\$13,150	(\$2,000 increase)		
Program Steward:	\$ 6,360	(\$ 960 increase)		
Abbot's Assistant:	\$ 7,640	(\$1,080 increase)		
Business Manager:	\$ 3,620	(\$ 540 increase)		
Total	\$30,770	(\$4,580 increase)	\$ 15,385	YTD

Other Operating Costs

Presenters:	\$ 3,000	(\$4,500 decrease)	\$ 1,000	YTD
Travel:	\$ 500	(\$3,000 decrease)	\$ 143	YTD
Project Consultants:	\$ 6,225	(\$1,500 increase)	\$ 4,112.50	YTD
Facilities:	\$ 2,500	(no change)	\$ 1,250	YTD
Seminar Meals/Snacks:	\$ 1,500	(\$ 200 increase)	\$ 245.43	YTD
Web Support:	\$ 750	(no change)	\$ 375	YTD
Seminar Supplies:	\$ 1,000	(\$ 200 increase)	\$ 191.31	YTD
Printing:	\$ 500	(no change)	\$ 249	YTD
Postage:	\$ 180	(no change)	\$ 200	YTD

Total	\$16,205		\$ 7,766.24	YTD
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Total Year-to-Date			\$ 23,151.24	
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Total Project Cost	\$46,975			
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Angell Grant	\$42,745			
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Balance	\$ 4,230	(to be covered by participant donations)		
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