
SANTA CRUZ ZEN CENTER



POLICIES AND PROCEDURES MANUAL

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Mission & Vision

Mission Statement

The purpose of Santa Cruz Zen Center is to embody and communicate the teachings of the Buddha.

Our understanding of the non-duality of wisdom and compassion, practice and realization, has been conveyed through the teachings of the Soto School.

The focus of our center is on integrating Zen practice and everyday life.

Vision Statement

The vision of Santa Cruz Zen Center is to keep alive the Buddha's open-hearted way, compassionately engaging with ourselves, our community, and our world.

We cultivate zazen, study, fellowship, and opportunities for creative expression, supporting peace and the liberation of all beings.

Agreements to Cultivate Heartfelt Relationships in Sangha

1. Listen carefully and actively. Seek clarity. “Slide in sideways.”
2. Be forthright. Speak authentically, including your emotion, confusion, dissent, deeply held thoughts and ideas. Participate fully.
3. If you are in conflict with another member, engage deeply in open dialogue to reestablish connection and reach clarity. Either singly or together, seek counsel as needed from someone not engaged in your outcome. (See our Ethics and Grievance Statement for guidance).
4. Be inclusive—find ways to say “yes.” Create shared understanding.
5. If issues relevant to Board responsibilities come up outside meetings, talk to one another, and then to the Board as a whole. Keep us involved as one body.
6. Let our deep engagement in practice guide us in our thought, speech, and action as the governing body of Santa Cruz Zen Center.

Board Member Roles & Responsibilities

In general, SCZC Board Member responsibilities include, but are not limited to the following:

1. Setting the policy for the organization. This is done by:

- Creating, updating, and/or understanding the mission and vision statements
- Determining the organization's programs and services
- Approving the strategic plan
- Understanding, reviewing, and abiding by the organization's policies

2. Monitoring the organization's operations:

- Attending regular and special Board meetings and actively participate in proceedings.
- Serving on at least one committee. Attending regular committee meetings and actively participate in the proceedings.
- Being accessible, at least by phone or email, to other Board members as needed.
- If applicable, contracting and periodically evaluating SCZC's practice leadership
- Working with and providing support to the executive officers and Board.
- Reviewing, updating, and/or approving the annual budget, annual report, etc.
- Approving major contracts and grants.
- Soliciting and reviewing program evaluations.
- Troubleshooting as necessary.

3. Serving as a public figure for the organization

- Fundraising, by directly donating to SCZC and/or soliciting donations from others.
- Advocating for the organization. Your statements as an advocate should be harmonious with the mission of SCZC. Be careful about making independent statements, especially statements that might reflect your own opinion and not the organization.
- Attending organization events and fundraisers.
- Sharing resources and talents with the organization, including expertise and contacts. While you are sharing your expertise and contacts, treat your role as any other professional

role and meet the same duties of care and take the same precautions. Don't equate volunteering with a lesser standard.

- Serving as an advocate for the organization within your circle of influence – personal, business, civic, etc.

4. Fulfilling other board responsibilities:

- Fulfilling commitments within agreed upon deadlines.
- Maintaining and promoting high ethical standards including good-faith Board decisions making and avoiding an actual or perceived conflict of interest with other activities, interests, and/or organizations with which the Board member may be involved.
- Maintaining the confidentiality of the private information of SCZC, community members, and other board members.
- Communicating effectively and respecting the diverse opinions of others.
- Agreeing that no compensation of any kind shall be paid to any Board member for the performance of his or her duties as a Board member. This shall not in any way limit reasonable compensation for payment for services provided to the organization by the Board member, provided that there is full disclosure of the terms of such compensation and the arrangement has been approved by the Board.
- Disclosing to the IRS any specific or general expertise you bring to the board as well as your position and duties within the organization.
- Agreeing that in the event, for whatever reason, that if you can no longer fulfill your duties and responsibilities as a Board member of SCZC, you will immediately notify the Board president and make arrangements to transfer any outstanding responsibilities to other Board members.

Board Elections Process

The General Membership Meeting will be the first Saturday of November. The Board may change it to a different Saturday in November to accommodate special circumstances. The schedule for the elections process is built to ensure the new Board members are confirmed by the November All Sangha meeting.

July Board Meeting

Board appoints a nominating committee made up of Board and general Sangha members.

Board confirms date for election, to be held at a General Membership (All Sangha) meeting. The committee will coordinate with the administrator to announce the All Sangha meeting and election process in the e-news and sangha newsletter.

July - August

The treasurer will provide the nominating committee is provided with a list of voting members: those who have been contributing or sustaining members for at least one year.

August Board Meeting

Board designates slate of officers. Discussion of officers should be done enough in advance of the election that new officers can be recruited and trained, if necessary.

August - September

Nominating committee solicits nominations for the at-large board positions. Candidates must be voting members (as described above.) Individuals may nominate themselves, or others.

Candidates prepare written statements:

1. Nominating committee contacts nominees and establishes if they would like to run for the board. Those nominees who accept write a personal statement for the ballot: qualifications, why they want to serve on board.
2. Officers write a personal statement for the ballot: qualifications, why they want to serve on board.

September Board Meeting

Select a board or voting member who is NOT a candidate to count votes. This person will be referred to as the Counter. The Counter receive ballots, tally them in advance, and follow-up on missing ballots.

The nominating committee submits a list of proposed candidates to the Board. At the Sept. Board meeting, the Board determines which candidates will appear on the ballot for the election.

September

Immediately after the September Board meeting the Committee prepares ballot with candidates' biographical statements and cover letter as well as numbers each ballot.

October

In the first week of October the ballot and cover letter is mailed to all voting members. The Counter records which members are sent which ballots on the ballot registration list. This should be kept in a sealed envelope, and only used to determine missing ballots in case of a lack of quorum or a tie.

The Counter receives ballots and keeps a tally of votes. Counter establishes that 50% of the voting membership voted, which is considered a quorum. The at-large candidates who receive the most votes become the new member-at-large. The bylaws specifies that there should be at least two, but may be as many as six, members-at-large. Counter also verifies that the slate of officers was approved by a simple majority of the voting members.

The members of Nominating Committee call each candidate and inform them of election results, and confirm whether or not they'll attend All Sangha meeting.

All Sangha Meeting

The new board is announced.

Prior to the first post-election board meeting

President meets with all new board members and reviews with them:

- roles of officers and board members
- decision-making procedure
- bylaws
- any background s/he feels is relevant
- any questions new members might have

Conflict of Interest Policy

Article I. Purpose.

The purpose of the conflict of interest policy is to protect this tax-exempt organization's (Santa Cruz Zen Center) interest when it is contemplating entering into a transaction or arrangement that might benefit the private interest of an officer or director of the Organization or might result in a possible excess benefit transaction. This policy is intended to supplement but not replace any applicable state and federal laws governing conflict of interest applicable to nonprofit and charitable organizations.

Article II. Definitions.

1. Interested Person.

Any director, principal officer, or member of a committee with governing board delegated powers, who has a direct or indirect financial interest, as defined below, is an interested person.

2. Financial Interest.

A person has a financial interest if the person has, directly or indirectly, through business, investment, or family:

- a. An ownership or investment interest in any entity with which the Organization has a transaction or arrangement,
- b. A compensation arrangement with the Organization or with any entity or individual with which the Organization has a transaction or arrangement, or
- c. A potential ownership or investment interest in, or compensation arrangement with, any entity or individual with which the Organization is negotiating a transaction or arrangement.

Compensation includes direct and indirect remuneration as well as gifts or favors that are not insubstantial.

A financial interest is not necessarily a conflict of interest. Under Article III, Section 2, a person who has a financial interest may have a conflict of interest only if the appropriate governing board or committee decides that a conflict of interest exists.

Article III. Procedures.

1. Duty to Disclose.

In connection with any actual or possible conflict of interest, an interested person must disclose the existence of the financial interest and be given the opportunity to disclose all material facts to

the directors and members of committees with governing board delegated powers considering the proposed transaction or arrangement.

2. Determining Whether a Conflict of Interest Exists.

After disclosure of the financial interest and all material facts, and after any discussion with the interested person, he/she shall leave the governing board or committee meeting while the determination of a conflict of interest is discussed and voted upon. The remaining board or committee members shall decide if a conflict of interest exists.

3. Procedures for Addressing the Conflict of Interest.

a. An interested person may make a presentation at the governing board or committee meeting, but after the presentation, he/she shall leave the meeting during the discussion of, and the vote on, the transaction or arrangement involving the possible conflict of interest.

b. The chairperson of the governing board or committee shall, if appropriate, appoint a disinterested person or committee to investigate alternatives to the proposed transaction or arrangement.

c. After exercising due diligence, the governing board or committee shall determine whether the Organization can obtain with reasonable efforts a more advantageous transaction or arrangement from a person or entity that would not give rise to a conflict of interest.

d. If a more advantageous transaction or arrangement is not reasonably possible under circumstances not producing a conflict of interest, the governing board or committee shall determine by a majority vote of the disinterested directors whether the transaction or arrangement is in the Organization's best interest, for its own benefit, and whether it is fair and reasonable. In conformity with the above determination it shall make its decision as to whether to enter into the transaction or arrangement.

4. Violations of the Conflicts of Interest Policy.

a. If the governing board or committee has reasonable cause to believe a member has failed to disclose actual or possible conflicts of interest, it shall inform the member of the basis for such belief and afford the member an opportunity to explain the alleged failure to disclose.

b. If, after hearing the member's response and after making further investigation as warranted by the circumstances, the governing board or committee determines the member has failed to disclose an actual or possible conflict of interest, it shall take appropriate disciplinary and corrective action.

Article IV. Records of Proceedings.

The minutes of the governing board and all committees with board delegated powers shall contain:

- a. The names of the persons who disclosed or otherwise were found to have a financial interest in connection with an actual or possible conflict of interest, the nature of the financial interest, any action taken to determine whether a conflict of interest was present, and the governing board's or committee's decision as to whether a conflict of interest in fact existed.
- b. The names of the persons who were present for discussions and votes relating to the transaction or arrangement, the content of the discussion, including any alternatives to the proposed transaction or arrangement, and a record of any votes taken in connection with the proceedings.

Article V. Compensation.

- a. A voting member of the governing board who receives compensation, directly or indirectly, from the Organization for services is precluded from voting on matters pertaining to that member's compensation.
- b. A voting member of any committee whose jurisdiction includes compensation matters and who receives compensation, directly or indirectly, from the Organization for services is precluded from voting on matters pertaining to that member's compensation.
- c. No voting member of the governing board or any committee whose jurisdiction includes compensation matters and who receives compensation, directly or indirectly, from the Organization, either individually or collectively, is prohibited from providing information to any committee regarding compensation.

Article VI. Annual Statements.

Each director, principal officer and member of a committee with governing board delegated powers shall annually sign a statement which affirms such person:

- a. Has received a copy of the conflicts of interest policy,
- b. Has read and understands the policy,
- c. Has agreed to comply with the policy, and
- d. Understands the Organization is charitable and in order to maintain its federal tax exemption it must engage primarily in activities which accomplish one or more of its tax-exempt purposes.

Article VII. Periodic Reviews.

To ensure the Organization operates in a manner consistent with charitable purposes and does not engage in activities that could jeopardize its tax-exempt status, periodic reviews shall be conducted. The periodic reviews shall, at a minimum, include the following subjects:

- a.** Whether compensation arrangements and benefits are reasonable, based on competent survey information, and the result of arm's length bargaining.
- b.** Whether partnerships, joint ventures, and arrangements with management organizations conform to the Organization's written policies, are properly recorded, reflect reasonable investment or payments for goods and services, further charitable purposes and do not result in inurement, impermissible private benefit or in an excess benefit transaction.

Article VIII. Use of Outside Experts.

When conducting the periodic reviews as provided for in Article VII, the Organization may, but need not, use outside advisors. If outside experts are used, their use shall not relieve the governing board of its responsibility for ensuring periodic reviews are conducted.

Decision Making Process & Gradient Scale Voting

Policy

The Santa Cruz Zen Center Board reaches decisions by consensus agreement by polling on a scale of 1-5 with a "1" being full support and "5" being veto. If the Board is unable to reach a consensus decision, the Board will use a majority rules decision procedure.

Procedure

1. The Board reaches decisions by consensus agreement by polling on scale of 1-5 with a "1" being full support and "5" being veto. The President decides, after having facilitated full participation, if there is enough agreement in polling to make a decision.
2. If there is not enough agreement after three rounds of discussion over three meetings, any Board member may request that a yes/ no vote be taken. 2/3 majority of the Board members in attendance must agree to enter the process of a yes/no vote.
3. If there is not a 2/3 majority agreement to continue to a yes/no vote, discussion continues, the proposal is amended, and the Board reverts to the polling for consensus decision rule.
4. If the Board decided by vote to vote, at the fourth meeting the Board members vote yes or no on the proposal. 2/3 majority of the Board members who have attended all three meetings passes the proposal.

We acknowledge that there is a way to disagree without causing division. There is a way to include a wide range of views without excluding anyone or anything. This group will take the time to articulate the following:

Values: what are the practice aspects that support these values:

- Full participation
- Mutual Understanding
- Inclusive Solutions
- Shared Responsibility

Behavior: Naming specific meeting behaviors that enact the values of practice for the sake of safety and trust.

Suggestion for specific questions to inquire with someone who has polled a 4 or 5 such as: "I am curious about..." or "would you be willing to help me understand..." without creating defensiveness; avenues to talk about the relational hard stuff.

Voting Guide Table

Vote	1	2	3	4	5
Meaning of the Vote	Wholehearted Endorsement Full Endorsement Full Support	Support with a minor point of contention or reservation	Neutral No opinion	Major Reservations	Veto Block No
Description Statements of Vote	<ul style="list-style-type: none"> • This decision is good for our group. • I'm in full agreement. • I fully support. 	<ul style="list-style-type: none"> • Support and I have a suggestion. • Support and I need more information. • Support with a minor concern. • This decision is adequate for our group but I have something to add or clarify. 	<ul style="list-style-type: none"> • I may have concerns but I'm okay with it going forward. • I don't feel strongly one way or the other. • I defer to the wisdom of the group. 	<ul style="list-style-type: none"> • More discussion is needed. • More information is needed. • Major reservation and I don't understand. • Major reservation and I think its problematic. • Major reservation and I think we need to loop more people into this conversation. • I disagree. • I don't understand the issues well enough yet. • This decision is problematic but I'm not going to hold up the group. • The group needs more vetting of ideas, more divergence, more creative alternatives. • I'm not ready to take a position yet. • I'm not sure that our proposal is addressing the problem. • I'm not sure that our proposal is addressing the underlying issues. • I am looking for a "both/and" solution. • I am concerned about the long term implications of this decision. 	<ul style="list-style-type: none"> • I have serious concerns. • I have serious concerns which have not been addressed. • I am opposed to this on principle. • I can't support the proposal.

Ethics & Grievance Procedure

Background

The Santa Cruz Zen Center ethics statement and grievance procedure has been under development for many years. We began in the early 1990's when a few students in a precepts class created a first draft. After community discussion, another group continued developing the statement. By this time, many other Zen Centers around the country were also drafting their own ethics statements so this second group of writers was able to augment their thinking with some of the work of other Buddhist centers.

In 1999, a second draft was presented to the Practice Committee, (a group which consults with Katherine Thanas about practice issues). Many of the thoughts in this second draft were also discussed at a subsequent community meeting, following which the Practice Committee further edited the document.

When the board received the revised version, additional refinements were made, and on March 19, 2000, the board approved a version. This version was presented to the general membership at an All-Sangha meeting on April 2 and the suggestions recommended at that time have been incorporated into the present document.

SCZC's Ethics Statement was developed before there was such an entity as Soto Zen Buddhist Association (SZBA), an organization whose stated purpose is as follows:

"The Soto Zen Buddhist Association is organized to preserve and promote the Buddha-dharma through the teaching and practice of Soto Zen Buddhism in North America, and to facilitate trust, respect, communication, ethical conduct, and education among the many sanghas of Soto Zen lineages and in the wider community. Its purpose is also to compassionately widen the transmission of Dogen Zenji and Keizan Zenji's practice and understanding in the Western World."

In 2013, the Practice Committee reviewed and compared SCZC's Ethics Statement & Grievance Procedure to the SZBA's Ethics Statement. The majority of SCZC's Ethics Statement aligns with SZBA's Statement. The Practice Committee recommendations and discussion points were brought to the Board of Trustees on March 26, 2013 to consider adding sections related to drug & alcohol use and fiduciary responsibilities so that these sections are explicit and in alignment with SZBA's Statement. In August, 2013, the Board of Trustees approved the revisions.

Ethics Statement

This ethics statement is created in support of the purpose of the Santa Cruz Zen Center, which is to embody and communicate the teachings of the Buddha. Our understanding of the non-duality of

wisdom and compassion, practice and realization, has been conveyed through the Soto School of Japanese Zen. The focus of the Zen Center is on the integration of Zen practice and everyday life.

As community life is an integral part of our practice at Santa Cruz Zen Center, this document is an effort to awaken us to the complexity of our relationships with one another, and the possibility of harm that can result when we are unaware of the interconnection of motivation, behavior and consequence. We do not think this statement fully explores or expresses the complex and mysterious possibilities of human behavior. We see it as an initial step toward defining a wholesome personal and community life.

The sixteen bodhisattva precepts are the basis for the conduct of community relationships as well as individual practice.¹ We recognize the primacy of these precepts as guides for sangha members, teachers, and visitors.

Affirming our intention to walk in the way of Buddha, we acknowledge the impulses, conditions and tendencies arising in each moment and make effort not to act on those impulses or tendencies that may result in harm to ourselves or others. We aspire to make our best effort in this practice while acknowledging that we may fall short of our ideals on any occasion.

It is also our intention that the Santa Cruz Zen Center be a place where all people can practice in a safe and open environment. When our diversity appears to separate us, our practice is to engage in a careful process of recognizing, understanding, and appreciating our differences. In so doing, we affirm and respect our differences and similarities in whatever dimension they arise.

Although our practice at Santa Cruz Zen Center is warm-hearted and close, we acknowledge that within the intimacy of practice, conflicts, issues of sexual attraction, abuse of power and/or confidentiality may arise between members, and between students and teachers.

Ethical Standards

Sexuality & Relationships

At Santa Cruz Zen Center it is considered a misuse of authority, responsibility, and sexuality for a teacher or visiting teacher to engage in sexual behavior with a student.

Special care must be taken when people of unequal status or authority enter into a personal relationship because those in a formal role may have clear advantage or influence in such relationships. In particular, care should be shown toward new students. We have learned that it takes time for a new student to establish the foundation of his or her practice. Therefore, before

¹ For a good introduction to the precepts we refer you to the following books (which can be checked out from our library or purchased in Santa Cruz): *The Heart of Being: Moral and Ethical Teachings of Zen Buddhism*, by John Daido Looi; *The Mind of Clover*, by Robert Aitken; *Guide to the Bodhisattva Way of Life*, by Santideva; *Meaningful to Behold*, pgs. 50-60 and 132-141, by Geshe Kelsang Gyatso; *Returning to Silence*, pgs. 78-87, 88-90, 91-96, by Dainin Katagiri-Roshi; *What the Buddha Taught*, by Walpola Rahula; the precept study book in our library; and the "Refuges" section and "Precepts" section of this document.

forming a sexual relationship with another student, all persons in a formal role at Santa Cruz Zen Center should discuss the appropriateness of the potential relationship with a practice leader or person in authority.²

Continued expression of sexual interest after being informed that such interest is unwelcome is also a misuse of sexuality, even when it occurs between students.

Members are encouraged to discuss any questions or concerns they may have about these issues with someone on the Board.

Fiduciary Responsibility

SCZC has the expectation that individuals in authority will respect and abide by the Bylaws, financial policies and decision-making procedures of the Board of Trustees and all chartered sub-committees of the Board knowing that the Board of Trustees carries the fiduciary responsibility for SCZC.

Illegal Intoxicants

No illegal intoxicants will be used on SCZC property.

Confidentiality

Students at Santa Cruz Zen Center should feel that they can fully explore the dharma and study the self in an atmosphere of trust. SCZC practice leaders and visiting teachers should not disclose information they receive in dokusan or private practice discussion, unless serious harm may result to individuals or to the sangha if the information is not disclosed. Practice discussion is an intimate meeting between student and teacher and should be treated as such by both. Intimate communication taken out of context can easily be misinterpreted and can undermine the trust and commitment between student and practice leaders or person in authority.

Sometimes either one may consult with someone outside the relationship. When the conscious intention of that communication is to clarify feelings and/or understanding of the teaching, not to circumvent or undermine the student-teacher relationship, such conversations can support and strengthen the sangha.

Discussions that arise in class should be considered privileged also and discretion used when discussing class conversations outside of class. Using discretion means paying attention to how we speak: not slandering, not being hypocritical, not gossiping. We practice using language that does not set “you” apart from “me” and does not create solid objects (personalities) “outside” or “inside”.

Conflicts Between Members

When an interpersonal conflict arises, it is essential that it be attended to fully. This involves waking up to our own personal contribution to the suffering in these situations through awareness

² Sangha members in a formal role include priests, board members, managers, and zazen instructors.

of our reactions, emotions, and attachments. This involves taking the time to discuss the conflict directly, when possible, with the other parties involved, in an attempt to clarify the actual causes and conditions of the situation, and the feelings and responses that arose.

When possible, disputes and disagreements should be resolved informally and directly between the people involved. (See Attachment 1: Guidelines for Informal Resolution of Conflicts and Attachment 2: Ceremony of Reconciliation.) However, we recognize that for certain grievances, complaints, and conflicts, informal resolution may not be possible. For these situations, we offer a Formal Grievance Procedure (see Attachment 3) through the Board of Directors, for resolving disputes concerning administrative decisions or actions and for addressing perceived misconduct by sangha members.

Dual Relationships

Mental health and/or other professionals are asked to be sensitive to the possible complexity of dual relationships that may arise when both parties practice at the same dharma center. Therefore, SCZC practice leaders and sangha members in a formal role at Zen Center who work as psychotherapists should avoid drawing clients from the sangha.

Guidelines for Informal Resolution of Conflicts

The suggestions that follow are intended to give all persons involved in a dispute a chance to be fully heard in an environment of respect and kindness. We make these suggestions because we understand that despite differences of opinion we meet in the identity of our Buddha nature.

It is often useful to invite one or more neutral witnesses or mediators to take part in a session of conflict resolution. Such a person may simply be a silent witness, providing a sense of calm and presence, or may be an active mediator who helps ensure that each person is given uninterrupted opportunity to speak. Invited facilitators can be anyone whom both parties respect: e.g., neutral acquaintances, or people who are trained in mediation.

1. Being Heard

It is important that everyone be given an opportunity to be fully heard. This means that everyone be given a chance to recount how they remember the history of the conflict, to state their feelings regarding the conflict, and to explain the goals they have for its resolution. Each person should have a chance to speak, uninterrupted by questions or comments from others. Taking calm, deliberate and adequate time to listen to each other is often all that is needed for reconciliation to begin.

2. Restating What Was Heard

To ensure that everyone understands one another, it is useful for each party to briefly restate what the other has said, highlighting the main points. The other party then says whether the restatement is complete and accurate, and makes corrections.

3. Acknowledgment of Shared Responsibility

Resolution and reconciliation is greatly facilitated if everyone involved reflects on how he or she may have contributed to a conflict and then explains this to the other. Self-reflection by all can provide a safer, more trusting environment for everyone.

Ceremony of Reconciliation

(This ceremony is one means through which people in conflict can seek reconciliation. We suggest the guidance of a priest in conducting this ceremony.)

Incense offering

Formless repentance:

All my ancient twisted karma

From beginningless greed hate and delusion

Born through body speech and mind

I now fully avow

Dedication:

- Ceremony of forgiveness for injuries caused or imagined;
- Ceremony of forgiveness for the self;
- Ceremony of healing (of this relationship) and rededication to the harmony of the sangha.

We wish our life within the sangha to express our bodhisattva intention. The bodhisattva path is our heartfelt response to suffering. Turning away or skimming over suffering through avoidance, silence, rationalization, assigning blame, minimizing, feeling self-deprecating guilt or not listening deeply to its causes and conditions are a cause of additional suffering.

When a conflict, grievance, or violation of the precepts arises in our interpersonal relationships it is essential to attend to it fully. This involves waking up to our own contribution to the suffering through understanding our reactions, emotions and attachments. It also involves taking the time to discuss the conflict with the other party in an attempt to clarify the actual causes, conditions, feelings and responses that have come together in a situation.

1. What is it you appreciate about each other?
2. What are you afraid of (about the other)?
3. What do you want to ask for (from the other)

Three Refuges

We take refuge in Buddha. We acknowledge the Buddha nature of all beings. Fundamentally everyone is equally the expression of Buddha nature.

We take refuge in Dharma. We acknowledge the wisdom and compassion of the bodhisattva way of life.

We take refuge in Sangha. The harmony of the sangha is our most precious treasure. We acknowledge the central role that community life has in our practice. We aspire to create an inclusive environment for everyone's engagement in the Bodhisattva way.

Precepts

We understand precepts are not intended to be followed literally, as rules. They are an expression of the enlightened mind. We practice with them to understand those moments of our lives where we may violate our own intention to live truthfully, in clarity, and in support of all life. In our tradition, precepts are intended to be investigated through our body, speech and mind.

The Three Pure Precepts

TO DO NO EVIL This means to refrain from causing harm to oneself, to others, to animals, plants, the earth, the waters and to the air.

TO DO GOOD This means to uncover and act from the loving kindness, compassion, sympathetic joy and equanimity of our awakened nature.

TO SAVE ALL BEINGS This means to offer everyone the opportunity to discover and express his or her awakened nature. We recognize the importance of maintaining a balance between an individual's negotiation of the Way and the community's collective religious and institutional needs. When there is a perceived conflict between these, the process of open communication and clarification is a practice of "saving all beings".

The Ten Essential Precepts

1. A disciple of Buddha does not kill but rather cultivates and encourages life.

This precept expresses the bodhisattva's intent to live compassionately. Not killing can also be understood as not harming, especially not harming the body or psyche of another. Extreme displays of anger and maliciousness are a kind of "killing".

2. A disciple of Buddha does not take what is not given but rather cultivates and encourages generosity.

This precept expresses our commitment to live from a generous heart rather than from an acquisitive mind. We recognize that the misuse of authority and status is a form of taking what is

not given. It is important that individuals in positions of trust do not misuse their status or authority as a way to inappropriately influence others.

3. A disciple of Buddha does not misuse sexuality but rather cultivates and encourages open and honest relationships.

We acknowledge that sexuality is a field of practice, as are all parts of our lives, and we aspire to bring a compassionate heart and mindful awareness to our sexual relationships. In the midst of sexual desire, practice encourages us to become conscious of our unresolved issues around affection, friendship, motivation, power and control.

4. A disciple of Buddha does not lie but rather cultivates and encourages truthful communication.

Within community life, lying can entail the deliberate withholding or misrepresenting of information. Many difficulties would not arise were there not an element of deceit involved. Lying to oneself, to another, or to one's community obscures the nature of reality and hinders the intention of bodhisattva practice.

We are entitled to straightforward, complete information when we request feedback regarding our behavior, standing or performance within the community. We should feel that we can fully explore the Dharma and study the self in an atmosphere of trust.

5. A disciple of Buddha does not intoxicate self or others but rather cultivates and encourages clarity.

Bodhisattva practice occurs within the context of clear presence and mindful awareness, and a state of mind that is not conditioned by intoxicants. When clarity is lost, it is easy to break the precepts. It is our intention that Zen Center be an environment that supports those who are attempting to live without intoxicants. In this context, "intoxicants" may refer not only to drugs, alcohol, caffeine, sex, etc. but to Buddhist teachings as well.

6. A disciple of Buddha does not slander others but rather cultivates and encourages respectful speech.

False and malicious statements in and of themselves are acts of alienation from oneself and others. The consequence of slander is often pain for others and divisiveness within the community. Where the intention to slander does arise, the effort to understand its roots is an expression of this precept.

7. A disciple of Buddha does not praise self at the expense of others but rather cultivates and encourages self and others to abide in their awakened nature.

Praising oneself or seeking personal gain at the expense of others arises out of a misunderstanding of the interdependent nature of self. It is sometimes necessary, within the community, to question

or criticize the action of certain individuals. When doing so, one should pay careful attention to one's motive and intention and to the specific content of what is said and to whom.

8. A disciple of Buddha is not possessive of anything but rather cultivates and encourages mutual support.

Neither the resources of the community nor any position are the possession of any one person. It is not appropriate for anyone to use his or her relationship to the Center for personal gain or fame at the expense of the sangha or the practice of its members. Decision-making bodies aspire to make decisions in a cooperative and accountable manner, and with a wholehearted effort to consider all points of view. It is particularly important that the community's finances, decision-making structure, and minutes of major decision-making bodies be available in an accessible and understandable form.

9. A disciple of Buddha does not harbor ill will but rather cultivates and encourages loving kindness and understanding.

The harboring of ill will is a poison. More corrosive is the harboring of ideas of revenge. Sangha members having conflicts or tensions with others should attempt to resolve them with the person/s directly involved in a spirit of honesty, humility and lovingkindness. If informal resolution is not possible, mediation should be sought as a way to clarify the difficulty.

10. A disciple of Buddha does not abuse the Three Treasures but rather cultivates and encourages awakening, the path and teaching of awakening, and the community that takes refuge in awakening.

The three treasures are inseparable from each other. To abuse any one of them harms the other two. Community life is an important source of information about our awakening and our practice. To acknowledge our transgressions, to seek reconciliation and to renew our commitment to the precepts is the working of our Buddha nature and re-establishes our place in the sangha. When the sangha is complete the Three Treasures are manifest.

Formal Grievance Procedure

A formal grievance procedure is available when informal attempts at reconciliation have been exhausted or are deemed inappropriate. The prime purpose of the formal grievance procedure is to come to a decision regarding the specific issue or complaint submitted.

The Ethics and Reconciliation Committee, a subcommittee of the SCZC Board, receives formal grievances. The Ethics and Reconciliation Committee consists of three board members: an officer, an at-large member, and one other. Its task is to resolve conflicts and promote harmony in the sangha, not to assign blame or mete out punishment.

A formal grievance is initiated in the following way: (1) A written complaint is given to the President of the SCZC Board, describing the alleged behavior, and including a summary of informal attempts used to try to resolve the conflict. (2) The Ethics and Reconciliation Committee meets within thirty days, reviews the complaint, and decides whether a formal grievance procedure is warranted or whether other informal or administrative channels should be attempted first. If necessary, the Ethics and Reconciliation Committee may request further information from the person filing the complaint. (3) If the Ethics and Reconciliation Committee agrees that a formal grievance procedure is warranted, one or more meetings are then held with the Ethics and Reconciliation Committee and the parties involved in the grievance.

All ethical concerns will be handled seriously and confidentially. Ethics and Reconciliation Committee members will work out the form of any discussions on a case-by-case basis after consulting with the individuals involved. Any resolution or action that follows evaluation will also be handled on a case-by-case basis.

A community that has been subjected to clergy misconduct or other breach of trust can be deeply injured. Should this occur, we will call upon specially trained people who can support an intervention and a resolution.³

Reference: Soto Zen Buddhist Association Ethics Statement

³ As a resource, SCZC will maintain a list of lay and ordained people trained as mediators who are familiar with and sympathetic to the function and purpose of Soto Zen temples and sanghas and who are willing to help with clergy misconduct intervention and conflict mediation upon request.

Membership Dues Tracking

Purpose

The Treasurer is responsible for advising the Board on financial policy and providing direction to keep Santa Cruz Zen Center a viable economic entity.

Income from membership dues supports the management of cash flow and supports planning for financial sustainability of the organization.

Annual Membership renewal cycle for sustaining and contributing membership is defined as July 1 of the current year through June 30 of the next year.

Procedure

On a monthly basis, the Treasurer will:

- Monitor and record membership dues received from sustaining and contributing members.
- The Treasurer may delegate responsibility for recording contributions to the person making bank deposits. Deposits may occur more than once a month.

Membership Dues in Arrears

- A member three months behind will be contacted and reminded of membership dues in arrears. The contact will be made by the Treasurer.
- The Treasurer may delegate this responsibility to another board member with Membership Development responsibilities.

On an annual basis, in July or August, the Treasurer will:

- Contact sustaining and contributing members via email and request a new Membership Pledge form. Membership Pledge form will be updated with emergency contact information and any changes to address, phone, etc.
- A sustaining or contributing members may contribute membership dues on a monthly, quarterly, semi-annual or annual basis. The annual amount pledged is used for planning the annual budget.

Sustaining and Contributing Member right to vote for Board members or run for a Board position:

- In a Board election year, sustaining or contributing members will be allowed to vote or run for a Board position only if they are current with membership dues by August 31.

Violence & Abuse Prevention Policy

Violence and Abuse Prevention Policy

Santa Cruz Zen Center maintains zero-tolerance related to acts of violence, threats of violence or intimidation, including sexual or physical abuse or molestation of children as well as any nonconsensual sexual behavior toward adults at Santa Cruz Zen Center.

Violence and Abuse Prevention Operational Guidelines

Clergy, SCZC teachers, members of the Board of Trustees, and volunteers in organizational / administrative capacities agree to enforce the following guidelines:

- This Violence and Abuse Prevention policy is conspicuously posted.
- Background checks are conducted online for all persons either living on the SCZC property, in a leadership capacity for Santa Cruz Zen Center, or serving the sangha in Support Net Services, whether volunteer or paid.
- All events sponsored by Santa Cruz Zen Center have in attendance at least one person who has had their background checked through Zen Center's process.
- During retreats where overnight participants may be present, accommodations are same-gender.
- Parents are informed that they are responsible for being in the presence of their own children (any one under the age of 18) when their children are on the premises of the Santa Cruz Zen Center.
- Any person known to have been convicted of a violent felony crime will be evaluated by the entire Board for their capacity to hold a position of authority or reside as a tenant at Santa Cruz Zen Center.

Reporting Concerns

If you have a concern about violence, threat of violence, intimidation, or sexual misconduct at Santa Cruz Zen Center, please speak with any member of the Board of Trustees or any teacher or priest.

You may also review the *Ethics Statement, Grievance and Reconciliation Procedures*, approved by the Board of Trustees, for more guidance about how to file a grievance and what to expect if you do so.

In-Service Training

All persons in a leadership capacity at Santa Cruz Zen Center have documented completion of the following (or equivalent) training on mandated reporting requirements in California:

<http://clergy.mandatedreporterca.com/default.htm>

All those in a leadership capacity receive a copy of the Violence and Abuse Prevention Policy and Guidelines.

Background Security Clearance

Purpose

All sangha members serving in a capacity of leadership (Teachers, Directors of the Board of Trustees, Priests, Inos) or having contact with the general community (doans, Sangha Net volunteers) are required to pass a background security clearance.

Background security clearance contributes to maintaining liability insurance coverage. It also protects our sangha and the individuals holding a responsible role.

Note: In addition to passing the background security clearance, all persons in a leadership capacity have documented completion of the following (or equivalent) training on mandated reporting requirements in California: <http://clergy.mandatedreporter.ca.com/default.htm>.

See SCZC Violence and Abuse Prevention Policy for more details.

Procedure to Request Permission for Background Security Clearance

The Treasurer will:

- Request permission from the individual for a background security clearance completed by an independent company specializing in background searches. As of August 1, 2017 the information is submitted electronically to Intellicorp.
- The individual is to carefully read and complete a Disclosure and Authorization form (or similar document) that permits SCZC to request a background security clearance search.
- The completed form is returned, in person, to the Treasurer. It is not to be mailed or left unattended to be picked up the Treasurer.
- An individual may decline participation without giving reason. The individual's participation at SCZC will remain the same as long as someone who has passed the background security clearance is in attendance.
- SCZC pays the fee for the background security clearance.

Elements of the Background Security Clearance

The background security clearance covers these four areas:

1. SSN verification
2. Criminal Search
3. Nationwide Sex Offender Registry Search
4. Terrorist / Narcotics Search

Results of Search

Reports remain completely confidential and do not reside at SCZC. An individual can view of copy of the report from the "search firm". Only the signed Disclosure and Authorization form remains at SCZC for at least 5 years. Only name, current address, email address, and signature will be viewable on the disclosure. All other personal information such as date of birth and social security number is shredded.

Sample Letter

Dear [Name],

The Board of Trustees passed resolutions necessary for SCZC to maintain insurance coverage. It also protects our sangha and those of us in leadership roles.

Part of the process is to request your permission, as a member in a leadership position or a priest practicing here, for a background check by Intellicorp covering these 4 areas.

1. SSN verification
2. Criminal Search
3. Nationwide Sex Offender Registry Search
4. Terrorist / Narcotics Search

Carefully read and complete the attached Disclosure and Authorization form that permits us to complete a background search. Return it to me, in person, by Sept 15, 2012. Do not mail it or leave it at SCZC.

You may decline participation without giving reason. Your participation at SCZC will remain the same as long as someone who has passed the security check is in attendance.

Reports will remain completely confidential. All reports remain at Intellicorp. Your signed Disclosure and Authorization form must be kept at SCZC for at least 5 years. Only your name, current address, email address and signature will be viewable on the disclosure.

After passing the background check, please complete the sexual abuse guideline training for clergy at <http://clergy.mandatedreporter.ca.com/default.htm>. Although it is for clergy, it will be informative to all leaders.

I recognize that concerns can arise. If you have any questions, contact me directly.

Thank you,

[Name], Treasurer

[Phone number and/or email]

Website Management Policies and Procedures

Mission

To provide a 24/7 information center and online practice space for members of Santa Cruz Zen Center and those who want to learn more.

Goals

1. To provide a resource center for current members and participants.
2. To provide inroads to Santa Cruz Zen Center for potential local visitors.
3. To provide dharma information and resources for online visitors worldwide.

Policy

New and existing laws, policies, and procedures are being tested almost daily against the dynamic world of the internet. To ensure that we thoughtfully plan and deploy our online presence, please consult these policies and procedures, the Sixteen Bodhisattva Precepts, the Website Management Committee regarding Santa Cruz Zen Center website use and maintenance.

Guidelines

The purpose of this policy is to ensure that users can easily locate information and conduct pragmatic tasks with Santa Cruz Zen Center online. By maintaining a common domain name and visual design, we can distinguish our information from information provided by other sources.

- The Website Committee Role: The Committee is advisory to the Board. The Committee will review requests for design changes and bring forth recommendations to the Board for approval. Any design change requests should be made to the Committee as a whole. The Committee shall consist of the Webmaster, the Practice Leader Liaison and one Board member. A web designer may be used for consultation to the Committee. Unilateral decisions to change the website design, policies, or procedures shall not be made by any single individual. However, the webmaster is empowered to make changes to the website without Board approval as described below.
- The webmaster role: Working with practice leaders, teachers, outside consultants, and the board of trustees, the webmaster will coordinate and be responsible for the temple's website at www.sczc.org and related websites. The webmaster must ensure that the site maintains basic technical functionality, order in navigation, consistency in design, and accordance with policies. The webmaster will assist practice leaders, teachers, and officers of the board in regularly updating their own information on the site.
- Every teacher or practice leader will be responsible for providing appropriate website content on a timely basis in accordance with their present teaching duties.

- Teachers, practice leaders, and board members are responsible for regularly checking their respective pages to make sure they are functioning properly. If there are problems, they should contact the webmaster.
- Every aspect of the site, the information shared therein, and any web-based transactions must comply with the SCZC Bylaws, and the Policies and Procedures Manual.
- Website content and feedback should be reviewed regularly, with adjustments made to the site as needed by the design team.

Website Management

- The webmaster is responsible for www.sczc.org, in cooperation with content contributors.
- The webmaster may edit any page in keeping with design guidelines.
- The webmaster may delegate.
- Content contributors include:
 - Teachers and practice leaders may edit blogs and their own individual pages.
 - The board president may edit pages of site in accordance with their role (i.e., the president may edit the 'board business' pages and archives).
 - Board secretary, particularly for the purpose of uploading minutes or other notes.
 - The social media coordinator, who may and must regularly monitor social media submissions that flow to sczc.org, and official accounts on any and all outside social media platforms.
 - Other content creators may be assigned by the webmaster as needed, to edit specific areas of the site

Design

- Maintaining the basic navigation as set by the Website Committee, highlighting certain aspects and navigation pathways, will allow easy and logical navigation through the site.
- Achieving a consistent look that is easy to navigate, accessible to the public, and establishes Santa Cruz Zen Center content as a cohesive whole, are the hallmarks of the overall design.
- The design and look of the website and associated pages will be guided by standards and recommendations of the Website Committee.
- The website should have consistent themes and style, fonts, colors, and voice.
- The website should aim for accessibility, using alternative image tags, clear contrast fonts and colors, and intuitive navigation.
- The website contains both static (generally unchanging) and dynamic (regularly updated) information. Changes in static content should be done by the webmaster.

Editing and Regular Updates

- Updates for classes, events, and e-news content will be submitted to the webmaster by Thursdays and will be posted on Tuesday mornings.
- For the sake of cohesiveness throughout the website, content contributors must stay within the design guidelines and templates created by the design team.
- No changes to be made in the Styles area of Squarespace unless approved by the Website Committee.
- All content and comments should reflect the practice of right speech.
- Content contributors should refer to the 'Compliance and Links' section of this document for guidance on links and promotion of outside events.

Transactions

- The following official email addresses are created:
 - contact@sczc.org: This is the front-line contact address for SCZC. It is used as the general inquiry address on the website. The SCZC Administrator is responsible for responding at this email address, unless other arrangements have been made.
 - president@sczc.org: Maintained by the board president.
 - treasurer@sczc.org: Maintained by the treasurer.
 - membership@sczc.org: Maintained by the members of the 'membership' subcommittee of the board.
 - webmaster@sczc.org: Maintained by the webmaster.
 - accounts@sczc.org: Maintained by the webmaster.
- Digital financial transactions involving payment will occur over www.sczc.org payment systems. This is an opportunity to streamline the donation process and track information. This makes transactions easy for participants and also eases the work of the treasurer.
- Any information shared during a digital financial transaction, unless explicitly stated otherwise, should be considered private.
- Safe financial transactions are ensured through use of third party service providers in order to provide security, backup, and recovery. Network security prevents unauthorized network traffic. Operating system and application user account security prevents unauthorized users from accessing sensitive system functions.
- Introduction of any new third party payment service provider must be approved by the board.
- Any third party or other service provider (such as vendors, publishers, or social media platforms) whose service is requested to appear directly on the site, must be approved by the board.
- No personal data may be shared with outside individuals or organizations.

- Security and privacy in every aspect -- in personal, practice, financial or other transactions, for all participants, is of foremost importance.

Privacy and Reporting

- Information shared via sczc.org email addresses is considered public. Practice leaders, board officers, and teachers should make every effort to separate personal communication from official addresses. If personal practice information comes in through an sczc.org address, be sure to route it to a personal address and respond from there. Endeavor to explain this process to all parties, in the name of respect for privacy.
- Digital storage places may contain private information, which should remain private. If information is discovered that does not fit the purpose of a storage space or is inappropriately stored (i.e., personal or financial information in the general email archive), the owner should be notified as soon as possible and the information or communication removed, by the owner, immediately.
- Using, searching or investigating any private information discovered in an online storage place for purposes not directly related to one's explicitly assigned duties is not permitted.
- From the Policies and Procedures Manual: If you have a concern about violence, threat of violence, intimidation, or sexual misconduct at Santa Cruz Zen Center, please speak with any member of the Board of Trustees or any teacher or priest. You may also review the Ethics Statement, Grievance and Reconciliation Procedures for more guidance about how to file a grievance and what to expect if you do.
- Any concerns about violence, threats of violence, intimidation or sexual misconduct should be reported right away, regardless of the source of these concerns.

Compliance and Links

- Content on www.sczc.org must comply with all restrictions of political campaign intervention by Section 501(c)(3) Tax-Exempt Organizations. [Please review these restrictions.](#)
- Links may be used, when applicable, to provide further information to users. When possible, users should not be directed off-site. If it is necessary to direct users off-site, preference would be given to our affiliates. Links to other outside sites would preferably not include any site that is not in compliance with the above restrictions or our mission or inclusivity values.
- Promotion of outside events or groups should be limited. Editors should refer to the annual calendar provided by the practice committee and/or only link or promote events at which the sangha at large already participates (such as the Japanese Cultural Fair, or official, city-sanctioned pride events), rather use personal discretion.

- All content must comply with the Santa Cruz Zen Center mission and inclusivity statements.

Social Media

- All content and comments should reflect the practice of right speech.
- The role of the Social Media Coordinator is to encourage participation in Santa Cruz Zen Center by regularly posting on social media accounts, which may or may not flow onto the website.
- The social media coordinator will encourage free, open, and frank speech, and diverse views as well as monitor social media accounts for any incivility that might crop up alongside. The social media coordinator will have the power, after serious and balanced consideration, to remove any content deemed inappropriate or contrary to our mission.
- All new social media accounts should be approved by the board.
- Social media content should comply with the Santa Cruz Zen Center mission, inclusivity statement, 501(c)(3) compliance requirements and guidelines, and spirit of practice.