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One Calling: Three Bottom Lines A Practical Theology in Support of Organizational Faithfulness

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If humankind is called to affect history and the reshaping of the world, then men and women in business, political, social, health, educational and physical planning institutions must see themselves under the mandate of calling; a calling to corporate responsibility. This means that every institution is confronted with the pressing question, 'To what end?' To what purpose do we produce chemicals, educate children, build highways, elect officials, administer medicine and provide social services?'

Jitsuo Morikawa

If you wish for God, hold fast to the world!
Dietrich Bonhoeffer

The Challenge

THIS PARTICULAR MOMENT IN HISTORY is both a terribly auspicious and incredibly exciting time to be exploring the intersection of our understandings of religious faith and vocation as they relate to the purpose, life and performance of organizations in our world.

The highly-publicized failures of corporate leadership at Enron, World Com, Tyco, Arthur Anderson and the Roman Catholic Church in the United States have dramatically harmed the lives

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of tens of thousands of persons within and outside of these institutions while at the same time deeply shaking the confidence of the public at large in our nation's institutions and those who lead them. While there are innumerable opportunities for leadership to fail, these failures were especially grievous, for in each instance they appear to reflect a fundamental lack of understanding on the part of those in leadership about *what and whom they were holding in trust*. Add to these specific events:

- The high level of ambient anxiety that have permeated our public and private lives since the events of September 11;
- The ensuing preoccupation of our government with terrorism;
- The war in Iraq—an engagement with devastating long and short-term consequences for everyone involved; and whose official rationale has been widely challenged;
- The dissonance of continued talk about economic recovery amidst the persistent experience of economic malaise by the majority of individuals, families, communities and organizations.

It is no wonder we find ourselves faced with a level of collective dispiritedness and lack of confidence in the commitment and capacity of public and private institutions unmatched since the period near the end of the Vietnam War.

Two Questions

So it is somewhat audacious to be sincere (rather than rhetorical or cynical) in posing and engaging questions such as these: *How might we theologically understand the nature and purpose of organizations? And what might the practical implications of a theological understanding of organizations be for those responsible for leading these institutions on a day-to-day basis?* In the wake of the recent failures of corporate leadership it may seem especially audacious to be standing under these questions in other than a rhetorical fashion, because often enough those whose betrayal of the trust of leadership has been so well publicized have also been active church members. This has been a particularly painful and wounding irony in those cases where the failure of leadership has taken place within religious institutions themselves.³

These very questions about the relationship of faith and organizational life, however, do in fact speak to (and grow out of) a hunger expressed by a growing number of men and women who serve in roles of organizational leadership or trusteeship. Their yearning is for an experience of deeper alignment between the religious and ethical and what their workplace organizations demand

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of them. As the COO of one organization put it, “I’d like my wife and kids to feel proud of the things I do and decisions I make at work. Most of the time, I think they would be, but I fear there are other times when this would be a stretch.”

This essay considers learning emerging from a ten-year effort to develop a practical and applied theology of institutions⁴—the fruit of standing under these questions, queries which humble us through their relentless invitation to commingle our sacred ideals with the complex and highly pressurized worlds of our organizations.⁵

This journey has also been very much a source of hope. Those who have ventured it with us—organizational leaders from many different sectors of institutional life—have offered us a sustained opportunity to explore what it might look like for organizations to stand under the mandate of a larger sense of calling—one that embraces a commitment to not one but rather three bottom lines. Working together over time we have gained experience with integrating into organizations a theological framework of multiple bottom lines that is drawn in significant part from a particular religious tradition while at the same time offering non-sectarian language for wrestling with questions of organizational faithfulness. We have also learned a good deal about what variables significantly influence the likelihood of success (or failure) in attempting to integrate this “religionless theological framework”⁶ into the life of an organization—an approach our organizational partners in this journey have come to refer to as *Seeing Things Whole*.⁷

In this chapter, then, we will reflect briefly on the methodology for our work around a practical theology of institutions, and then identify five theological premises which have been distilled from our effort and shape the way we have come to regard organizations and informs the way we engage those who lead them. Finally, we will explore the journey of one institution—a technology and manufacturing organization—and its leadership around their effort to integrate this theological framework into the life and decision-making processes of their organization.

Our Method for Developing a Practical Theology of Institutions

Our approach to developing a theology of institutions was informed by a simple premise and a difficult problem. Our premise was that any genuinely useful theological perspective on organizations would necessarily emerge from the collaborative engagement between those whose center of gravity is primarily within the religious tradition (in our tradition, mostly seminary faculty

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and church leaders) and those who spend the great majority of their time preoccupied with the life and performance of the organizations where they work. We believe that an adequate theology of institutions can emerge only from an exploration which engages both of these worlds—the theological tradition and the world of organizations—with genuine care and respect.

The difficult problem is to pull this off. Our experience of the engagement of these two worlds with one another was that it was exceedingly difficult to achieve the desired balance. Too often, in engaging the world of secular institutions, the church in North America either blandly and uncritically affirms organizations and their leadership or, on the other hand, errs in the opposite direction by regarding institutions with an indiscriminately critical and unforgiving eye.

These unfortunate alternatives reflect a broader societal tendency noted by John Gardner when he wrote about institutions being trapped between those persons (often on the inside) who are complacent and unwilling to see the institution change, and those prophets (usually on the outside) who insist that the institution must change or else they will tear it down. Gardner described this as the battle between "the uncritical lovers" and the "unloving critics" suggesting that "love without criticism brings stagnation, but criticism without love brings destruction."⁸

Perhaps in avoidance of these two equally undesirable tendencies the thoughtful engagement of clergy and organizational leaders tended to not happen at all. Business leaders tended to shy away from the conversation, suspecting that their organizational world was of no real interest to their pastors, or more problematically, regarded by clergy with suspicion as being fundamentally unworthy of their respect. For their part, clergy, while curious, did not pursue this engagement, in part because they felt ill prepared for the engagement, uncertain what they might bring of value to conversations about complex and frequently high-stakes dilemmas facing the women and men who sat in worship on Sunday.⁹

We were convinced, then, that in order to develop a theology of institutions capable of undergirding the church's commitment to hold institutions in trust, it must emerge from a different kind of engagement between church leaders and lay people with operational responsibility within secular organizations. It must emerge from a conversation in which organizational leaders experience their complex worlds and the consequential decisions they face in these settings being held in trust through a dialogue marked both by respect and rigorous engagement.

We were also clear that an essential test of the adequacy of any theology of institutions which emerged from this engagement would be the extent to which it offered a basis for the development and support of "loving critics" capable of holding institutions in trust. One may hold

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an organization in trust either as a regenerative agent who works from within or as one who accompanies these organizations in a “trustee” role. Either way, the work of holding an institution in trust demands that one brings a larger sense of one’s role and purpose in the world and, similarly, a larger vision for the role and purpose of their institution in the greater scheme of things. A theology of institutions must help us to make this essential connection between that which is of pressing and immediate concern and what, on the other hand, is of ultimate importance.

Given these clarities, we determined that our approach toward developing a practical theology of institutions should meet the twin criteria of being *tangibly grounded in organizational life* and *clearly informed by theological perspective*. To ensure that the effort was tangibly grounded in organizational life and experience we:

1. held our meetings onsite at the workplace settings of participating organizations.
2. focused our reflection around consequential and unresolved real-time issues presented by participating organizations.
3. oriented our engagement toward the goal of holding one another’s organizations in trust around the organization’s well-being and its impacts on constituents both within and outside of the organization.
4. worked to ensure that the majority of those participating in our meetings had ongoing operational or trustee responsibility for real organizations.¹⁰
5. adopted as a key ground rule for our meetings an agreement to maintain the confidentiality of our conversations in order to permit frank engagement around issues of importance.

To ensure that our effort was clearly informed by theological perspective we:

1. sought to identify theological conversation partners from seminary and church settings capable of bringing:
 - insight and knowledge of the theological tradition and the capacity to make it accessible.
 - commitment to exploring the interface of theological tradition and organizational life.
 - genuine curiosity, disciplined listening skills and an attitude of fundamental respect to their encounter with the complex world of organizational life.
2. worked with theologians to identify concepts or premises within our particular Reformed theological tradition capable of reshaping our understanding of organizational life and its purposes.

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3. developed a theological model of organizational life, translated it into secular language for use within organizations, and worked with organizations around its integration and use.
4. developed a process for enabling men and women to gather around an organization and its leaders for the purpose of holding the organization in trust around a challenge facing it.

Five Theological Premises for Those Who Would Hold Organizations in Trust

When it comes to our theological perspective, what we see has everything to do with where we stand.

Out of this engagement, we have identified five theological premises which shape the way we regard institutions and consequently how we engage them. While some of these affirmations existed in the form of “theological hypotheses” at the outset of our work, in truth they emerged as a fruit from our effort to see and think theologically while standing in the midst of organizational life with all of the complex dilemmas that face God’s people in these settings. These affirmations form the basis of a *practical theology of institutions*, constituting a theology capable of informing our practice. In speaking with others, we have found that the essential truth of some of these premises resonate with similar truths emerging from other religious traditions.¹¹

Premise #1: Institutions are part of God’s order.

Walter Wink, a biblical scholar whose writings on the *powers and principalities* have powerfully shaped our theological understanding of institutions, writes: “These Powers are the necessary social structures of human life, and it is not a matter of indifference to God that they exist. God made them. For this reason... the account of creation in Genesis does not end in chapter 2, with the creation of the world, but in chapter 10, with the creation of the nations... The meaning is clear,” he concludes. “Humanity is not possible apart from its social institutions.”¹²

Premise #2: God loves institutions.

As part of God’s world, institutions are the object of God’s love. It is not enough, however, to say that God loves institutions in an abstract or general sense. Our tradition understands God’s love to be not only a universal attribute of the Divine, but also the essence of God’s intimate concern for each of us individually. Believing that God’s love is both universal and particular, we are compelled to declare not only that God loves institutions in general, but also that God loves each institution in all of its messy particularity.

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From our perspective, the implications of this assertion are stunning! They begin to become apparent when you try out the premise by completing the statement, “God loves _____” with the name of particular institutions. God loves the New York City Fire and Police Departments. God loves the International Red Cross and Amnesty International. God loves Mondragón and the University of St. Thomas. God loves Iraq’s fledgling transitional government.

So far, so good. What goes on for you, however, when you attempt to similarly affirm other, perhaps less likely, institutions? God loves Enron, WorldCom or Tyco? If you are anything like us, this latter assertion may leave you a little edgy. Nevertheless, we believe it is true, and that rooting ourselves in this conviction offers an important basis for the kind of compassionate regard for organizations that is capable of enabling us to serve as critical lovers who hold these institutions in trust.¹³

Premise #3: Institutions are living systems.

The affirmation that institutions are living systems links two important assertions, both fundamental to seeing institutions whole. The first is that *institutions are alive*. To say this is to recognize that the “being-ness” of institutions is comprised not only of its more tangible outward and physicality (e.g. its facilities, people, formal organizational and information systems, technology and equipment). Along with this a perhaps less-tangible interiority or animating spirit whose energy is reflected through a combination of historical memory, shared convictions and dreams, proud successes and bitter disappointments. This animating spirit (spoken of by others as an organization’s DNA or culture) is enduring, a red thread persevering through the institution’s storyline over time, and must be well understood by those who would seek to hold the organization in trust.

The other assertion of this premise is that *institutions are systems*. As such they are wholly interdependent with the entire evolving world around them, both *impacting* and *impacted by* everything that takes place throughout the constantly emerging reality of the existing order. A fundamental reflective discipline of healthy organizations is maintaining a consistent awareness of these twin dimensions of the institution’s utter interdependence with the world around it: both its fundamental dependence upon that world along with the inevitable intended and unintended consequences of its decisions and actions upon that same world.

The recognition of institutions as systems also has significant implications for the way we understand the internal life of organizations—as a whole comprised of a constant and dynamic

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interdependence of countless elements exercising conspicuous or invisible influence on one another.¹⁴ The three-fold model organizational life developed by Seeing Things Whole and presented later in this essay is a theological recognition of the systemic nature of organizations.

It is around this awareness of organizations as systems (and as existing within systems) that we find particularly relevant both Robert Greenleaf's reminder that the root meaning of the word religion (*re ligio*) is to re-bind, and his recognition of the importance of seeing things whole as the basis for this. (see endnote #7).

Premise #4: Institutions are called and gifted, they are fallen and they are capable of being redeemed.

Here we have three important theological assertions about the nature of organizations embedded in a single statement. While each is essential in its own right, they are presented here together for an important reason.

Institutions are called and gifted: As expressions of God's dynamic and unfolding order, institutions are here for a reason. They are intended to be instruments of God's healing and reconciling purposes, and are both gifted and called to serve the common good in particular ways. They exist for good purposes, are capable of good things and good things are expected of them.

Institutions are fallen: As members of God's order, institutions are prone to inflating and protecting themselves, to forgetting their membership in the larger community of God's creation and to acting in ways that neglect or harm the common good. In this sense, they are much like each of us, capable both of great good and immeasurable harm.

Institutions are capable of being redeemed: Unlike the first two dimensions of this assertion which to many may appear self-evident, this third is clearly a statement of faith. No matter how apparently fallen or broken, institutions are capable of reawakening to their own best possibilities. Part of holding an organization in trust is calling it back toward a recommitment to this potential. This is particularly difficult when the institution's sensibilities have become anesthetized by the gratification of their self interests, paralyzed by fear or anger or burdened by the shame of past failures. Fundamental to holding an organization in trust around its brokenness is the recognition that all three of these realities—that the institution is gifted and called, that it is fallen and that it is capable of being reawakened to its best possibilities—all three of these exist in every institution. Moreover, they exist not as mutually exclusive truths, but rather they coexist *simultaneously* as possibilities within

the life of each institution, each present in some measure at any given moment in the organization's life.¹⁵

Premise #5: Faithfulness in institutional life is predicated upon the recognition and management of multiple bottom lines.

A working theology of institutions should do more than offer a basis for reflecting from the perspective of religious faith on the nature and purpose of organizations while looking in from the outside. It should also offer a conceptual framework capable of informing the perspective and decision-making of those who would serve as regenerative agents operating within. And it should also be accessible to everyone regardless of religious orientation, offering a conceptual framework for seeing things whole.

Here, of course, we reckon with an important truth about our organizations: namely, that the spiritual and religious orientation of those who work within them is far from homogeneous. Instead, those who work within our organizations comprise an exceedingly rich mosaic of religious traditions, spiritual practices and secular philosophical and values-based orientations. From the perspective of the organizational leaders with whom we were working, while organizational decision-making and performance consistent with their own sacred ideals was highly desirable, they were also and equally committed to pursuing this in a way that did not impose their personal religious belief system on their co-workers. "What we need," they said, "is a non-religious way of gaining theological perspective together on the challenges and decisions we face."

The challenge, then, was to develop an operational theological framework that simultaneously offered insight into the operational dynamics and realities of organizational life while moving at theological depth with a spiritually diverse workforce. In the end, to accomplish this, we drew upon a theological model that had been developed long ago to describe the nature of one institution, the church, and then moved to translate that model into secular language that reflects dimensions of life familiar to most secular organizations.

Three-Fold Model of Organizational Life

During conversations with the theological faculty at Andover Newton Theological School while searching for a theological framework for understanding institutions, theologian Gabriel Fackre proposed the *threefold office of Christ* as one possibility¹⁶. He suggested this framework, in part, because

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it was one of the early ways the Christian Church articulated a theological understanding of its own institutional life. It also resonated with earlier action-research findings which indicated that the conventional single “bottom-line” theory of organizations did not reflect the reality of the multiple bottom-lines that many leaders take into account in their decision-making.¹⁷

The threefold office of Christ, attributed to theologian John Calvin, identifies the roles of Prophet, Priest and King as three essential expressions of the life and ministry of Jesus. These same roles are prominent in Hebrew Scripture, each representing both a different way of mediating God’s relationship with Israel and the surrounding world and a particular expression of power.¹⁸ In consultation with Fackre, we developed non-religious language describing these three dimensions in organizational life which reflected the theological tradition, calling it the *Threefold Model of Organizational Life*.¹⁹

Each of the dimensions represents a unique cluster of preoccupations, associated stakeholders, core values, and ways of exercising power that are characteristic in organizational life. There are predictable and legitimate tensions among these three areas, and at times these tensions can operate destructively within the life of an organization. In a healthy organization, these dimensions function not as separate fiefdoms within the institution, but rather as a commonwealth of collaborative service. When any one dimension loses sight of this fundamental interdependence with the other dimensions, it is prone to a more destructive expression of its concerns.²⁰

A brief description of these three dimensions follows.

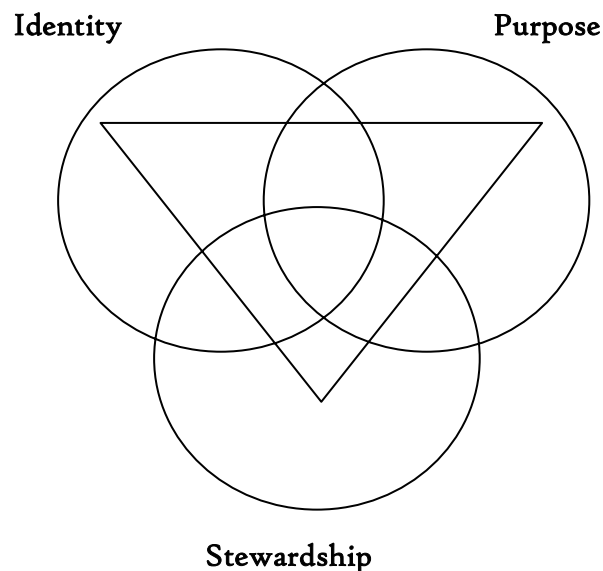


Diagram 1

The Identity (Priestly) Dimension of Organizational Life: Theologically, this dimension represents an understanding of Jesus as high priest who, having experienced the vulnerability of the human condition, offers his life as a sacrifice capable of restoring to wholeness the divine-human relationship. This dimension is primarily concerned with healing, wholeness and the well-being of the gathered life of the organization. The primary stakeholders associated with this dimension are those who work for the organization. Its preoccupations include a concern for how the organization structures the character and quality of its gathered life, how it creates an environment that reflects its core values and how it draws members of its workforce toward their fullest potential. This would include how the organization designs its work spaces; how it recruits, hires, evaluates, rewards and dismisses its employees; how it disseminates information; how it distributes power and assigns accountability and how it models investment in and commitment to the values it professes.

Marks of faithfulness in this dimension include: explicit acknowledgement of the values and principles guiding the life of the organization; those who work for the organization personally resonate with these values; private and public life congruent with these values; and the capacity for honest self-reflection, including recognition of instances when the organization has some measure failed to uphold its values.

The Purpose (Prophetic) Dimension of Organizational Life: Theologically, this office represents an understanding of Jesus as the prophet who bears witness to an alternative order; a witness which includes both the articulation of a compelling vision and a critique that recognizes the dissonance between that vision and things as they are. Whereas the Identity dimension of organizational life is inwardly focused, the Purpose dimension is focused outwardly on the organization's interface with the world around it. The primary stakeholders associated with this dimension include its customers or clients, its suppliers, its competitors and the natural and human communities affected by the organization. Its preoccupations include concern for the clarity of the organization's vision and mission; how it structures the processes for producing a "good" that is needed and valued by others; how it markets or sells this good and how it serves the client and the wider world—in short, how the organization justifies its existence to the world around it.

Marks of faithfulness in this dimension include: a mission that offers a serious response to real needs in the world around it, accountability to the world around it for the exercise of its

mission, an understanding of service that leaves those served better informed, less dependent and more empowered in the exercise of their own capacities.

The Stewardship (Royal) Dimension of Organizational Life: Theologically, this dimension represents an understanding of Jesus as ruler. Whereas kings tended to exercise their power in a coercive way, bending persons and institutions to their will in order to make things happen, Jesus modeled a fundamentally different understanding of leadership in which serving, empowering, facilitating and persuading are the essential approaches. (The servant nature of organizational leadership is reflecting in our diagram [page 10] by an inversion of the traditional organizational pyramid in which management is at the top.²¹ In the Three-Fold Model of Organizational Life, the dimension of Stewardship is located at the bottom, symbolizing its role of serving the organization's work in the world and those who do it.) The primary stakeholders associated with the Stewardship dimension include management, owners and trustees. Its preoccupations include a concern for how the organization secures and utilizes its resources (human, financial and material) so as to sustain its viability while balancing the legitimate needs of each of its stakeholders and the wider community.

Marks of faithfulness in this dimension include: decision-making that expresses confidence in the long-term sustainable future of all stakeholders, governance marked by inclusiveness and structures and systems which constantly evolve to sustain the capacity of the organization to utilize its unique gifts in service to the world around it.

Engineered Products: One Organization's Journey of Developing the Capacity to See Things Whole

The challenge of balancing the legitimate concerns associated with these three bottom lines came into focus in a dramatic way at Engineered Products²², a company with whom we have worked around the use of the three-fold framework as a tool for seeing things whole around important organizational decisions.

"I remember at one point we were bidding for a major contract," Ed, the GM of Engineered Products, recalled. "This was the next generation of a product we had already been producing for one of the Big Three auto manufacturers. We were competing to retain the contract to produce this component. The stakes were high for us, because not only had we engineered it, but we had, of course, heavily invested in the machinery for producing it. Moreover, this product represented more

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than 15% of our business. We felt we couldn't afford to lose this contract. Our customer, on the other hand, was committed to maximizing their own bottom line by pressing for the lowest possible bid on the product, so the competition between our company and our competitor—a company we respect a lot—was fierce. They had structured the bidding process to encourage a race to the bottom—every time they would receive a bid from one of us, they would turn around and show it to the competitor and invite them to try to beat it.

“Because of this, the bidding got ridiculously low—so much so that we had pretty much cut our profit margin out of the proposal in an effort to get our numbers down. Nevertheless, our competitor came back with another bid that was even lower than ours. You have to understand that at this point, our adrenaline was flowing. Our team went into a marathon session to make our proposal irresistible. Because we had already given up our profit margin on the product, the only way we could sweeten our proposal was to offer cost reductions on other product lines we provided for this manufacturer. We were so bent on winning, however, that we didn't hesitate to do even this. It was a momentum thing.

“It wasn't until a few hours later, after we had faxed out this final proposal that the full impact of what we had just done came home to us. In order to win the business, we had given away the earnings margin which supports our research and new product development and our employees' gain-sharing compensation plan—the very things that help to make us so competitive. We looked at each other and said, ‘What have we just done!?’ And at that point, we knew there was only one thing we could do. We called our customer and withdrew our proposal.

“Our competitor won the contract and we're glad they did. They took a beating with it. We're fortunate that we came to our senses. That's when it became clear to us that in order for our company to stay healthy, we have to pay attention to more than just one bottom line.”

While this impressive instance of managerial mindfulness might be understood to be solely a function of the individual character of those involved in this decision at Engineered Products (character *does* matter, and was indeed a factor in this instance), there is more involved here than simply another instance of good people doing the right thing. Ed and his colleagues had laid essential groundwork for this moment and others like it through tending to a variety of factors which significantly impact an organization's capacity to see things whole.

These factors have emerged as learning from our preliminary work with several organizations who collaborated with Seeing Things Whole around an effort to institutionalize a multiple-bottom-lines framework along with explicit core values as a religionless theological

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framework capable of supporting faith organizational decision-making and performance.²³ We refer to the ten factors as *blocking and enabling factors* because they can either enhance or inhibit the organization's capacity to see things whole. These factors include:

Factor #1: A Champion and a Change Agent Team

Factor #2: Organizational Capacity for Honest Self Reflection

Factor #3: Three Dimensional Understanding of Organizational Life

Factor #4: Explicit Values

Factor #5: Relevance of Values

Factor #6: Cultural Congruence of the Values

Factor #7: Personal Congruence of the Values

Factor #8: Integration and Alignment

Factor #9: Balcony Perspective

Factor#10: Resonance with Sacred Ideals

The ordering of these factors represents the rough sequence in which they will most helpfully be addressed in an organization.

Factor #1: A Champion and a Change Agent Team

Almost always the journey of an organization begins with the passion and commitment of a key leader within the organization. While it is true that the existence of a single highly capable and committed person in a key leadership position is not sufficient to guarantee the success of this effort, it is equally true that without the commitment and full support of such a leader this effort little chance of flourishing. There really is an inextricable link between servant leaders and servant organizations, leaders who are committed to and capable of seeing things whole and organizations that embody this same ability and discipline.

In the case of Engineered Products, such a leader existed in Ed. His commitment to undertake this journey was very much an extension of his own desire as a person of faith (Christian) wanting to discover and more intentionally live out the implications of his religious beliefs in his work as CEO of this technology and manufacturing firm. For a couple of years, we met with Ed on an occasional basis at his place of work, both to learn about his organization, its world and challenges, and to serve as a conversation partner as he wrestled with the complex and frequently high-stakes decisions that faced him as chief executive. These meetings were significant both in

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orienting us and permitting us to develop a level of confidence in our capacity to partner well with one another around this conversation.

If our effort, however, had remained limited to this lively and thoughtful engagement with Ed, while its fruits may have included benefits for Engineered Products, the capacity of the organization itself to see things whole would not have been changed in any significant way. Indeed, in some organizations our collaboration never did progress beyond one-on-one conversations with an individual organizational leader, and in every instance where this was true, the effort failed to take root in the larger organization.

A necessary next step in this process takes place when the original organizational leader moves to involve additional coworkers in the conversation. Ed recalls this as a critical moment in Engineered Product's journey with this effort, and one that felt risky as he anticipated it. He was uncertain who to invite into the conversation and worried about how they might respond to the experience. He eventually gathered a team that included his VP of Engineering VP of Human Resources and, later, the newly hired Chief Operations Officer. The conversation was framed as one about exploring the multiple bottom lines that were important to a healthy organization, and what explicit values might guide Engineered Products around each of these bottom lines.

That group has met monthly around this conversation with an STW staff person for nearly six years now, wrestling together with many significant challenges to the well-being of Engineered Products in the highly-pressurized and competitive environment of their industry. Most often these challenges have been the occasion for revealing and strengthening the collective moral and spiritual character of Engineered Products, a corporate spiritual discipline that has, in its own way, almost always involved soul searching, frequently profession, at times confession and forgiveness and, often enough, the renewal of promises and the commissioning of one another for service back into the world beyond this time of fellowship.²⁴

Factor #2: Organizational Capacity for Honest Self Reflection

Another factor which has been instrumental to Engineered Products' ability to see things whole is its capacity and commitment to collectively assess its own life and performance in a way that acknowledges both its successes and failures.

Those of you who spend significant time inside of organizations know that both individual and collective honest self-reflection is a relatively rare attribute. The significance of this capacity for honest self-reflection becomes even more important when considered in light of an organizational

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desire to stand under explicit core values. Organizational core values, if they are to be worth much in the life of an institution, will sometimes be the lenses through which we recognize and celebrate our faithfulness while at other times they will reveal to us our imperfection in light of our ideals. They will, that is, if we are able to reflect honestly together on our performance in light of these values.

At Engineered Products, it was the ability of Ed and his colleagues to reflect honestly in light of their core values on the implications of their striving at all costs to win the bid for desired business with an important customer that led them to withdraw their bid. Had they moved forward with their bid, they would have seriously undermined their commitment to at least three of their core values—*Shared Costs and Benefits* (the value-added gainsharing compensation plan), *Superior Quality*, and *Sustainability*.

The failure to do this—to reflect truly together on individual and organizational performance in light of our values, gives rise to cynicism about the relevance of the core values and the company’s commitment to them. Moreover, the failure to self-reflect honestly is, at some level, an expression of theological immaturity—denying as it does the fundamental truth of the imperfection that is inevitably part of our human condition, both individually and organizationally.

Factor #3: Three Dimensional Understanding of Organizational Life

This factor focuses on the organization’s readiness to embrace an understanding of its life which affirms multiple dimensions and related bottom lines, each representing legitimate needs and concerns within the life of the organization that at times are in tension with the concerns of the other two areas. Organizational leaders have resonated intuitively with this three-fold understanding of institutional life, having abundant experience with the tensions that normatively exist among the interests associated with each of these bottom lines.

The organizations we have worked with have used a variety of approaches to introduce this framework to employees and reinforce the logic of multiple bottom lines in an ongoing fashion. At Engineered Products, Ed and his leadership team introduced this three-fold conceptual framework by putting it to work at their annual off-site planning meeting. There he engaged a group of 30 managers with the framework through integrating it into their annual strategic planning and evaluation process. Beginning by sorting their key strategic objectives for the previous year into one of the three categories, they then proceeded to numerically assess their progress on each of these objectives. The average of the scores from the objectives associated with a particular area (Identity,

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Purpose or Stewardship²⁵) gave them an initial read on how they were performing overall within each of these dimensions.

By doing this, they not only introduced their managers to this three-fold way of thinking about their organization through integrating it into their existing strategic planning and evaluation process, but in the process discovered that they had a significant imbalance within their organization. Due in large part to the highly demanding and competitive nature of their industry and the pressures related to earnings expectations (Engineered Products is a publicly held company), they had clearly-defined and ambitious objectives associated with both the Purpose and Stewardship dimensions of their organization, but relatively few in the Identity dimension. This confirmed their growing awareness that employees at Engineered Products were feeling the strain. Within a few weeks of that discovery, Ed convened task force of managers and employees to explore what might be done to strengthen the company's performance around its diminished bottom line in the area of Identity (concern with the well-being of employees).²⁶

Factor #4: Explicit Values

A key to using this framework to support faithfulness in organizational life lies in the organization's becoming quite explicit about what values ought to guide the organization's decision-making and performance around each of these three bottom lines. The hope was that the language of core values might provide a common idiom, providing those within organizations a nonsectarian way of expressing shared ideals and applying these ideals to their corporate processes of planning and decision-making.²⁷ It is important, we believe, in identifying its core values that an organization develop not a single composite list of all of its values, but rather clusters of values related to each of the organization's three dimensions.

In our work with Engineered Products, we engaged them in a process of clarifying their essential core values through inviting those within the organizations to recall stories of occasions which reveal core values related to each of three dimensions of their organization's life—stories related to how Engineered Products hold its employees in trust, stories related to the way EP serves and relates to the world around it and stories which reflect how EP manages resources and governs itself. These stories recounted both moments which revealed their organization at its best (and were therefore a source of pride) and particularly low or distressing moments when EP's character was somehow at risk. We assumed that both types of stories—proud moments and close calls—reflected values that were of some importance to the gathered life of their organization.

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A key assumption here is that just as the organization must pay attention to multiple bottom lines which are frequently in tension with one another, so also must it manage the tension among the values related to each of these three dimensions. In another case at Engineered Products, leadership became alerted to a potential problem with one of their products related to its use in applications that did not conform to original design specifications. Although there had not yet been any report of failures in the field, EP engineers had reason to believe that such a failure was a real possibility given the way their product had been installed. Their dilemma was whether or not they should report this concern to the customer, particularly in light of the absence of actual performance failures in the field. On one hand, their core values of *Integrity*, *Superior Quality* and *Collaboration (with customers)* suggested that they should pursue the matter. On the other hand, stepping forward with their concern could very well put their values of *Sustainability* and *Growth* at risk. They were concerned that their customer would not acknowledge its responsibility for the outside-of-spec installation of the product and would instead seek to assign financial responsibility for the liability solely on EP—an event that would result in unwarranted and damaging financial impact on EP whose effects would be felt by shareholders and employees alike. The very nature of moral dilemmas confronts us not with the clear choice between absolute right and wrong, good and evil, but rather the anxious uncertainty that attends having to discern the best way forward amidst a more ambiguous terrain of competing goods and multiple legitimate interests.

Factors Which Clarify What To Look For In Core Values (Factors #5, #6, #7 & #10)

In addition to correlating to three-fold understanding of organizational life and the issues normatively associated with each of these areas, the core values should also be tested and when necessary revised against four other criteria. (For more on the interrelationship of these factors, see endnote #27.)

- **Factor #5: Relevance**

The values must be capable of illuminating the real challenges which face the organization. EP's core values clearly served them well in this regard.

- **Factor #6: Cultural Congruence**

The values must express the best of the organization's existing culture. If they are radically discontinuous with the "genetic code" of the organization, they are likely to be marginal in the day-to-day life of the organization.

• **Factor #7: Personal Congruence**

The values must resonate with deeply-held personal values of employees if they are to command the respect and loyalty of employees around difficult decisions.

• **Factor #10: Resonance with Sacred Ideals**

The values must resonate with ultimate truths which find expression in the world's great religious and spiritual traditions. This last criteria is crucial if the values are to be capable of bearing the weight of theological meaning. Without this resonance, the values are in danger being unacceptably tame or tepid, and incapable of challenging "business as usual".

Factor #8: Integration and Alignment

To ensure that their core values have genuine impact on the day-to-day management of their organizations, Seeing Things Whole has been working with our organizational partners to identify (and, when necessary, develop) processes for identifying which core values are in play around a given challenge or decision, and for utilizing their values in the strategic problem-solving and decision-making that finally must take place. At Engineered Products the three-fold framework and related values were integrated into the organization's existing strategic planning and evaluation process (see section on Factor #3) and are used regularly to explore the potential values impact of emerging challenges or scenarios.

In some instances EP's core values were used in combination with a polarity management framework²⁸ to structure the movement from the "either-or" thinking represented by contending values-based proposals toward a "both-and" mindset which commits to developing integrated approaches that seek to integrate rather than choose between legitimate values in tension around a given issue.

Factor #9: Balcony Perspective

Finally, we have operated with the assumption that organizations, just like individuals, function more faithfully when they operate within a community of discernment and support where challenges are examined by those who "hold the organization in trust" even though they do not carry the operational responsibility for its decisions.

These "temporary trustee" gatherings have taken place in a couple of different formats. During the past ten years, a network of colleagues from across the United States has come together

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twice a year for just this purpose.²⁹ Their gatherings take place over a two or three-day period, usually in a retreat or conference center. Participants come together at the facility of the host organization over a light supper on the evening of the first day, usually a Friday, some having traveled considerable distance for the sole purpose of serving someone else's organization. Old friends greet one another, and typically a few new friends are welcomed into the circle for the first time. Following supper, representatives of the host organization guide a walking tour through their facility, allowing participants to soak in the organization's atmosphere and perhaps in some way catch glimmers of its spirit through the arrangement of its work spaces, from the photos on walls and expressions on the faces of nearby employees.

And then, for the remainder of that evening, they continue the process begun earlier through the walking tour of meeting the focus organization as its leadership team shares stories of the organization's beginning (For what reason did it originally come into existence?); its purpose (Who does it serve, and how?); its employees (Who does the work, and what is it like for them to work here?); critical or defining moments in the organization's history; and, ultimately, the challenge which currently faces them as an organization.

More recently, we have begun to experiment with regional cohorts of organizations who meeting together more regularly to offer peer accompaniment around challenges facing one another's organizations. While the full-weekend gatherings have been powerful for those participating, many desired to develop a sustainable rhythm of more frequent contact that would permit a more substantial level of mutual support. The first cohort began in 2003 in the Boston area, and includes four organizations, including Engineered Products, who gather on a quarterly basis. This cohort is now in its second year.³⁰

In the Boston cohort each organization is represented by a consistent team of 2-4 people. The meetings are a half-day in length and take place onsite at the facilities of participating organizations on a rotating basis. The host organization presents a focus challenge currently facing it, inviting participants from the partner organizations to offer support and perspective, drawing upon the presenting organization's core values and the spiritual traditions of those participating. The sessions typically end with participants reflecting on any insights or implications of the morning's conversation for their own setting.

Over the course of these gatherings, both in their weekend and half-day formats, participants have held one another's organizations in trust around complex and high-stakes issues:

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- The relentless pressure to move manufacturing jobs off shore
- The impact of reverse auctions on employees, product quality, financial viability and customer relationships
- The problem of employee inventory theft
- The problem of intellectual property theft not only by competitors also as well by valued customers
- The challenge of nurturing collaborative relationships with customers and suppliers in a single-bottom line culture
- What to do when significant opportunities for your business involve providing products or services about which you have misgivings
- In healthcare, how to manage the tension between cost-efficiency and access to essential care
- How to share the pain in lean economic times

Now more than ever before organizations must be understood as an essential part of God's dynamic and unfolding order, called to and accountable for the full use of their capacities on behalf of the common good. From a theological perspective, organizational faithfulness in living out this vocation must be understood as a mandate to attend to multiple bottom lines, frequently in tension with one another. Recognizing this makes the task organizational leadership more and not less difficult for those who committed to integrating faith with organizational life.

When people of faith and conscience come together around pressing issues facing their organizations, the act of their venturing together is, in and of itself, a courageous and faithful act. Through it we are too often reminded that wisdom and stout hearts cannot guarantee success. Indeed, faithfulness amidst the messiness of real world engagement surely has little to offer for those who seek the reassurance of unblemished conscience.

There have been times when this process of accompaniment has indeed yielded the fruit of exciting new possibilities where before there had been uncertainty. Even on the occasions when this has not been true, however, participants have returned to their settings with a deeper clarity about what it might mean to move faithfully amidst the complexity facing them and with the courage to try to do all that might be done.

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¹ Richard Broholm, “Trustees of the Universe: Recovering The Whole Ministry of the People of God. (Shelburne Falls, Massachusetts: Seeing Things Whole, 2001), 3.

² Dietrich Bonhoeffer, *Letters and Papers from Prison*. ed. Eberhard Bethge (New York: Macmillan, 1971), 81.

³ While the recent struggles of the Roman Catholic Church have been highly publicized, they are by no means the only Christian denomination wrestling with the problem of clergy sexual abuse and the failure of institutional leadership to more proactively and forthrightly address this problem. The recognition of this problem, however, serves to reinforce our sense that the church, in its institutional expressions, has a great deal more in common with its secular counterparts than we may prefer to acknowledge, embodying a mixture of faithfulness and brokenness.

⁴ The initial call for the development of a *theology of institutions* emerged simultaneously from two persons who, as far as we know, did not know one another. One was Robert Greenleaf, a student of organizations and leadership during his career within AT&T and later during his years as a consultant to leadership in universities, business foundations and religious institutions developed the notion of *servant-leadership*. The other was a prophetic American Baptist Church leader by the name of Jitsuo Morikawa who in the 1960s initiated an action-research program of the World Council of Churches in Philadelphia to explore how the church could more effectively relate to men and women who serve in so-called “secular” organizations within an urban context. For a lengthier consideration of Greenleaf and Morikawa’s respective calls for the development of a theology of institutions, see *Toward A Theology Of Institutions* by Specht and Broholm (Indianapolis: Greenleaf Center for Servant Leadership, 2003) and *Trustees of the Universe: Recovering the Whole Ministry of the People of God* by Richard Broholm (Shelburne Falls, Massachusetts: Seeing Things Whole, 2001).

⁵ In this chapter (and in our work) we use the words *institution* and *organization* interchangeably.

⁶ German pastor and theologian Dietrich Bonhoeffer wrote of “religionless Christianity” in wrestling to make sense of his experience that the great majority of those involved with him in the resistance to the Third Reich were not religious in an explicit or traditional sense, while the German church had largely remained largely silent. Faithfulness as a Christian in these circumstances, he concluded, had less to do with naming the Name than with sacrificial participation in the suffering of the world.

⁷ It was probably E.B. White who first coined the phrase “seeing things whole,” and Robert Greenleaf who passed it along to us, proposing it as an essential capacity for those who would be servant leaders. It was also Greenleaf who reminded us that the very meaning of *religion* has to do with re-binding that which appears to have been wrongfully disconnected. Thomas Merton, the contemplative monastic, urges us to strain to see the “hidden wholeness” in all of life—echoing a theme which runs through many of our religious traditions: the Jewish vision of Shalom, the Christian image of the just and peaceable reign of God, the Buddhist notion of “Interbeing,” and the Native American awareness of the “Spirit which runs through all things.” As a network seeking to understand the intersection of faith and organizational life, the name immediately resonated with us as the kind of language capable of bearing theological meaning without imposing a particular religious tradition on the pluralistic culture of secular organizations.

⁸ These words are drawn from John Gardner’s 1968 address at Cornell University, recalled in *A Strategy of Hope: Lay Ministry For Organizational Change*. (Philadelphia: Metropolitan Associates of Philadelphia, 1972), 48.

⁹ Laura Nash and Scotty McLennan do a wonderful job of exploring this disconnect in opening sections of their book, *Church on Sunday, Work on Monday*. . (San Francisco: Jossey-Bass Publishers, 2001).

¹⁰ In talking with our organizational partners, we learned that many tended to shy away from conferences and other events where the majority of participants were likely to be either academics/theoreticians or consultants, preferring instead a balance the permitted them to engage peers who like themselves carried day-to-day operational responsibility within organizations.

¹¹ It bears acknowledging, that our articulation of these premises derives from a particular religious perspective—the Reformed Protestant Christian tradition—one which we do not regard as normative or authoritative for people whose religious persuasions are different from our own.

¹² Walter Wink, *Engaging the Powers*. (Minneapolis: Fortress Press, 1992), 66. In his own footnote, Wink credits this important insight to Hebrew Scripture scholar Gerhard von Rad. 66.

¹³ We are indebted to John Dalla Costa for his observation that this premise lays the groundwork for an engagement with organizational leaders whose first movement is pastoral. God loves each of these organizations, not because they deserve it because they are good, but rather because they are God’s. In the end, however, our engagement with organizations cannot remain pastoral only. God’s love is the occasion for God’s pain as well—especially so given the inevitable participation of each of us, individuals and organizations alike, in the fallenness of creation as well as its goodness.

¹⁴ Here we are particularly indebted to Russell Ackoff and Margaret Wheatley for helping us to come alive to the systemic nature of life in general and of organizations in particular.

¹⁵ Here again we are indebted for this insight to Walter Wink, *Engaging The Powers*. (Minneapolis: Fortress Press, 1992), 65-85.

¹⁶ For a fuller description of the theological roots of this model, see Gabriel Fackre’s essay, “Christ’s Ministry and Ours,” published as part of a collection entitled *The Laity In Ministry: The Whole People of God for the Whole World*. (Valley Forge: Judson Press, 1984). 109-125.

¹⁷ This action-research took place as part of MAP (Metropolitan Associates of Philadelphia), the World Council of Churches program initiated by Jitsuo Morikawa and led by, among others, Dick Broholm. A fuller consideration of the work and contribution of MAP see *Toward A Theology Of Institutions* by Specht and Broholm (Indianapolis: Greenleaf Center for Servant Leadership, 2003) and *Trustees of the Universe: Recovering the Whole Ministry of the People of God* by Richard Broholm (Shelburne Falls, Massachusetts: Seeing Things Whole, 2001).

¹⁸ For another intriguing use of the three-fold office of Christ, this time as way of offering a threefold understanding of the Christian commission of management, see John Dalla Costa’s chapter “Casting the Nets: Managing Integrity From “Needs of the Soul”

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¹⁹ David Specht and Dick Broholm, *Three-fold Model of Organizational Life: Testimonies and Queries for Seeing Things Whole*. Shelburne Falls, MA: Seeing Things Whole, 1995). This document is available in PDF format on the web site of Seeing Things Whole (www.seeingthingswhole.org).

²⁰ There are intriguing correlations between STW's *Three-fold Model of Organizational Life* and three principles from Catholic Social Teaching of *Subsidiarity*, *Socialization* and *Solidarity*. In a preliminary conversation with Michael Naughton, we identified the following pairings: Subsidiarity and Identity; Socialization and Stewardship; Solidarity and Purpose.

²¹ While this innovation of inverting the traditional organizational pyramid resonates with the language of servant leadership, it actually originated in the work of MAP as they experimented in their own gathered life with flattening their organization and models of shared leadership (see endnote #17 above).

²² Engineered Products is the fictitious name for a real company, one of several we have worked with during the past ten years in an action-research effort exploring the use of the three-fold model of organizational life as a framework for supporting faithful organizational decision-making and performance.

²³ In addition to Engineered Products (a technology/manufacturing company), the organizations involved in this initial phase of our work included a medical technology company, an urban hospital, two financial services companies, a software company, a public school system, a parochial school, a software company, two local church congregations and a chain of retail bicycle stores.

²⁴ All of this with a leadership circle that includes a church-goer in the Christian Protestant tradition, two unchurched with roots in the Roman Catholic tradition, and one with roots in the religious tradition of Islam.

²⁵ At Engineered Products, they refer to the Stewardship dimension of their organization as *Fiduciary Responsibility*.

²⁶ This underscores the systemic nature of organizations represented in the three-fold concept and calls to mind Russell Ackoff's twin axioms about systems and the way they function. The first was: *If a system is functioning optimally, you can be sure none of its parts will be*. The second is somewhat anti-intuitive: *If any single part in a system is functioning at maximum efficiency, you can be certain that the system as a whole won't be*. When an organization behaves as if any one bottom line functions as if it was the *only* bottom line of importance, you can be sure that other bottom lines in the organization will be diminished as a result, and that the organization will consequently suffer over time.

²⁷ This hope has been largely, although not unambiguously, realized. There are at least a couple of things that have our attention at this point. One is the candid acknowledgement by partners within a few of our action-research organizations that their organization's core values have faded into the background during times when they have been wrestling with high-stakes and complex challenges. This resulted not from any intentional putting aside of these values, but rather from a combination of the ever-accelerating pace of decision-making and the pervasive external pressures on an organization's decision-making process. One colleague observed, "Too often we feel that we have almost no prerogative to exercise, and almost no time to figure out how best to exercise it."

Another perhaps more fundamental challenge is that some of the core values that have been articulated may be too small for the souls of those who would seek to stand under them. While such values (those we actually hold) are a necessary starting place for any theological reflection that hopes to genuinely connect with operational practice (see theologian John Cobb's *Becoming A Thinking Christian*, Abington Press, 1993), they are not by themselves fully adequate. Values that are so tame as to merely baptize business as usual are, of course, inadequate. In order to be compelling, our core values must invite us to stretch beyond places of familiar comfort and challenge us to fulfill our best possibilities. In order to be worthy of our sustained loyalty, they must resonate powerfully with our deepest sense of self and most sacred ideals. Otherwise, when push comes to shove around difficult issues, it is too easy to follow the path of least resistance.

²⁸ The theory of polarity management was developed by Barry Johnson and presented in his book *Polarity Management: Identifying and Managing Unsolvably Problems*. Amherst, HRD Press Inc., 1996.

²⁹ A description and facilitator's guide to this process for holding an organization in trust has been published as a monograph entitled *A Theological Reflection Process for Illuminating Organizational Faithfulness* by Richard Broholm, Dale Davis and David Specht. (Shelburne Falls, Massachusetts: Seeing Things Whole, 1996).

³⁰ In the Fall of 2004 STW organizations in the Minneapolis-St. Paul launched a Twin Cities area cohort consisting of five organizations.