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# Core Values and the Three-Fold Model

## *Can the Language of Core Values Bear The Weight of Theological Meaning?*

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*Jesus calls people not to a religion, but to life!*[i]
Dietrich Bonhoeffer

## The Language Problem: Theological Reflection in Secular Settings

IN 1997, THE THEN NEWLY-NAMED *Seeing Things Whole* project undertook an action-research effort with 10 organizations in which leaders had committed to work with STW staff – at that point Dick Broholm, Dale Davis and I – to explore how the development and intentional use of explicit core values might enhance organizational faithfulness. The organizations came from around the country and included church organizations, educational institutions, health care institutions, institutions from the economic and retain sectors, technology and manufacturing firms.

Tom Henry and Ed Mosel were among the organizational leaders participating in this effort, and we are indebted to them and those others whose willingness to embark upon this venture made possible our learning.

The focus on working with core values coincided with a shift in the name of our own organization which had been known as *The Theology of Institutions Project*, which we left behind to become known as *Seeing Things Whole*. Our hope was that the new name would play better in the so-called "secular" organizations we hoped to engage. This shift and the move to focus on core values represented recognition on the part of both staff and participating organizational leaders that the use of explicitly religious language in most workplace settings is fraught with potential problems, as likely to be a source of division as it is a source of wisdom.

It was out of this desire to address these concerns that we elected to test the possibility within these settings that the language of core values might serve as the non-religious idiom for theological reflection within secular organizations. The language of core values, we hoped, might offer a common vocabulary for persons of diverse religious and philosophical persuasion to speak together about matters of ultimate importance. Such an approach was also consistent with theologian John Cobb's assertion that, practically speaking, the everyday process of theological reflection does in fact begin with our weighing issues of importance in light of *our own personal values and beliefs*.[ii] Only after we do this, do we then perhaps move to further examine these issues and our own perspectives in light of the sacred texts and our religious traditions.

However, the hope that the vocabulary of core values might serve as the non-religious language for theological reflection in secular settings was a wager that by no means represented a broad consensus within the culture at large, either then or now. There is a broad continuum of perspective on this matter with energetic convictions holding down both ends. Some believe that the use of explicitly religious language in the pluralistic settings of public institutions is an inappropriate imposition on those who do not share similar religious beliefs, while others are adamant that it is impossible to talk about faithfulness without talking about faith itself. One theologian observed that theological reflection, in a literal sense, must explicitly reference a transcendent other, while another theologian described theology as the process of people exploring matters of ultimate importance. One company uses carefully-developed statements of purpose and ethical principles as its language of "theological discourse," while another searches for ways of inviting its employees to draw more explicitly on their personal faith traditions as sources of

wisdom and truth capable of strengthening the company's capacity for wrestling with tough issues and difficult decisions.

Everyone seems to agree that the use of religious language, by itself, in no way guarantees faithful decision-making within our organizations, regardless of whether the organization is a church, a public school, or a money management firm. Nor does the absence of explicitly religious language mean that an organization is less faithful in its gathered and public lives.

Dietrich Bonhoeffer, Lutheran pastor who helped to lead the Confessing Church in opposition to Germany's Third Reich in the 1930s and early 40s, wrestled in his own life with this same question of religious language. When should we "name the Name" and when on the other hand should we refrain from doing so? While Bonhoeffer was himself a church leader and theologian, during his years as a member of the resistance to the Reich he came to believe that religious language is a poor substitute for (and too often a diversion from) faithful action. He was pained that the response of his beloved church to the crisis was almost entirely one of self-protection, while those with whom he found himself collaborating within the resistance were in many instances non-believers. It was this experience that led him to declare "The Church must announce no eternally valid principles, but merely commandments that are valid for today!"[iii]

In the end, Bonhoeffer's solution to the language problem was to move simultaneously in both directions. On the one hand, he began to speak and write of *religionless Christianity* in which one refrained from "naming the Name" while instead fully participating in the struggle of the world. At the same time, recognizing the importance of nurturing the deep center of one's identity, Bonhoeffer described an *arcane discipline* in which believers came apart with one another around the disciplines of confession, liturgy, fellowship, word and sacrament.

From a Christian perspective, then, STW's work around core values was an attempt to develop to develop the language and disciplines for non-religious theological reflection amidst the everyday high stakes complexity of organizational life.

## Core Values and Moral Dilemmas – Getting Past the Laundry List

In addition to the language problem, in undertaking this exploration there were two additional problems we hoped to overcome as well. The first was the all-too-familiar experience of what happens when human communities become embroiled with high-stakes issues where participants

bring both diverse perspective on what practical strategies are most likely to be helpful in shaping a desired future, but also deeply held beliefs and values about what from a moral perspective *ought* to happen. When this occurs our wrestling too often is inadvertently framed as a struggle to determine whose value(s) will prevail.

Outcomes based on such an either-or approach do not tend to be durable. *This is true because an essential feature of moral dilemmas is that they consist of problems in which the demands of two or more legitimate values are in significant tension with one another*. This is why it is so difficult to address this type of challenge. It necessitates replacing our familiar *either-or* approach to moral discernment with a *both-and* orientation that recognizes multiple truths.

This is consistent with the Three-Fold Model's[iv] recognition of multiple dimensions of organizational life. Each of these dimensions represents a cluster of preoccupations, core functions, and typical stakeholders – all essential to the organization, and each representing an important bottom line of health and performance which must be recognized and managed for the long-term well-being of the organization and those it impacts. Indeed, managing organizations as if their performance could be adequately represented by a single bottom line is shortsighted and even, it could be argued, immoral.[v]

It is but a short extension of this logic to then also recognize that any approach to create an explicitly values-driven organization must take care to identify values for guiding life and performance within each of an organization's three dimensions. An organization must have values which shape the gathered life of its coworker community *and* values which inform its interactions with its external stakeholders (e.g. customers, suppliers, competitors and the wider world) *and* values which shape the way it manages resources and governs itself.

Practically speaking, this means moving away from representing an organization's core values as a single list (suggesting a hierarchy) of values and instead mapping the core values in clusters associated with each of the organization's three dimensions. By working to identify explicit core values associated with each of these three dimensions of organizational life[vi], leaders are better equipped to frame and wrestle with practical and complex issues of significant consequence facing their organizations as moral dilemmas – issues in which two or more legitimate values are in tension – which is, of course, what they really are.

## Learnings

Our experience of working with a variety of organizations suggests that the language of core values can, in fact, provide an idiom permitting diverse workplace communities to identify shared ideals and a non-religious way of speaking together about organizational faithfulness. The results of the initial action-research phase of our effort were helpfully uneven (from a learnings stand-point), with some organizations successfully developing sturdy values-rich cultures which continue to inform their organizational life and practice, while other organizations faltered from the outset and in others significant initial progress has in more recent years faded. Our learnings have been summarized in a diagram of 10 factors that significantly impact an organization's effort to develop and sustain the capacity to see things whole using explicit core values.[vii]

Two general learnings are perhaps worth mentioning here. One relates to the candid acknowledgement by leaders that their organization's core values have on occasion become marginal around high-stakes challenges. In large part, this has not been result of a willful turning away from the organization's core values, but rather a combination of the ever-accelerating pace of decision-making and the pervasive influence of larger institutions and systems. As one colleague recently said, "Too often we feel like we have almost no room to maneuver and almost no time to figure out how to leverage what modest prerogative we do have." In some instances, this difficulty is compounded by the organization not having fully integrated their core values into their organization's policies and procedures, reward and recognition systems, planning and decision-making processes.

I believe, however, that we may face a more fundamental challenge: that some of the core values that we have articulated for our organizations may be too small for our souls.

In order to merit our commitment when the stakes are high – and to bear the weight of theological meaning – our core values must be at once very strange and strangely familiar. They must be strange in the same way Peter Senge talks about the quality of a good vision. Like a rubber band, in order to be useful a good vision must represent significant (albeit tolerable) tension with our familiar reality. Otherwise it does not have the capacity to draw us along toward a preferred reality. So too with our core values. Values so tame as to merely baptize business as usual will not cut it in the long run. In order to command our loyalty amidst difficult circumstances, our core values must invite us to stretch beyond hollow reassurance and instead call us toward our best possibilities. Such values, worthy of our loyalty, will express our deepest conviction about what is

ultimately important and true, and will at some times be the occasion for confession (we inevitably fall short of them at times) and at other times be the occasion for celebration.

These are the very challenges that led in the first place to our effort to develop organizational disciplines of values-based decision-making (non-religious theological reflection) as a way of supporting organizational faithfulness.

Challenge: Broad ownership among the diversity of perspective and belief in our organizations about an organization's core values is essential. In seeking to achieve consensus on our core values, however, we may discover that the common ground we have achieved feels more like a lowest common denominator that demands too little of us and bears faint resemblance to the higher ground that inspired us to undertake the journey.

Challenge: Many of us believe that the wisdom traditions of the major religious and spiritual paths offer life-giving perspective that can potentially serve as a significant resource to our moral wrestling with difficult organizational challenges. Yet we are uncertain whether it is appropriate to draw upon such perspectives within our organizations. Moreover, given that most of our organizations are made up of persons whose spiritual orientations are very diverse – including most of the major religions, various alternative spiritual disciplines, and anti-religious sentiment – it is unclear how we might begin to tap into the spiritual resources of our organizations in ways that aren't divisive.

In a presentation at STW's Spring Retreat in 2000, the late Bob Terry in his inimitable way offered a typology distinguishing three different types of values that may be operative within the life of an organization.[viii] "Take care," Bob cautioned, "to be clear about what kind of values are in play."

- *Shared values* are values that are broadly owned among the leadership and employees of an organization.
- *Functional or Relevant values* are values that are fundamentally compatible with the essential purpose and activities of the organization.
- *Universal values* are those values which recognize essential truths woven into the fabric of reality and which find expression in the major religions and spiritual traditions.

When it comes to searching for core values that really contribute to greater faithfulness in our organizations all three of these dimensions are important. The values must be owned by those who

work for the organization. They must be relevant to the company's work and mission. And they must resonate with enduring ideals emerging from our sacred traditions.

Organizational core values that align these three dimensions may indeed be capable of bearing the weight of theological meaning, proving large enough for our souls and well deserving of our loyalty.

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[i] Dietrich Bonhoeffer, *Letters and Papers from Prison.* ed. Eberhard Bethge (New York: Macmillan, 1971), 286.

[ii] Cobb devotes an entire book to the exploration of what means to reflect theologically in the midst of everyday life: John B. Cobb, Jr., *Becoming A Thinking Christian.* (Nashville: Abington Press, 1993).

[iii] Bonhoeffer said this in a presentation at a conference on 'The Theological Basis of the Work of the World Alliance'. Eberhard Bethge, Renate Bethge, and Christian Gremmels, *Dietrich Bonhoeffer: A Life in Pictures*, trans. by John Bowden (Philadelphia: Fortress, 1986). p. 92.

[iv] 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).

[v] This resonates with a definition of heresy *the mistake of treating a partial truth as if it was the whole truth.*

[vi] An important part of STW's work has been the identification and development of tools and participatory processes for supporting organizations in the discovery and articulation of their core values.

[vii] This diagram is available in PDF format on STW's web site at seeingthingswhole.org.

[viii] This brief summary of Bob's presentation appeared in the Summer 2000 issues of *The Bridge*, STW's newsletter at that time.