SPECIAL DYNAMICS OF RELIGIOUS COMMUNITIES AS PLANNING ENTITIES

Strategic plans often function psychologically as containers for the long range future of an organization, whether it is a business enterprise or a faith-based ministry of some kind.

However, strategic plans have even more complicated dynamics in the setting of a religious congregation because of the uniqueness of their identity and leadership structure.

For religious communities, as with businesses and nonprofit ministry organizations, strategic planning can be used either as a realistic aid or as an imagined remedy for handling problems that are perceived to exceed the capacity of their leadership structure.

Identity: A religious community is not a performance organization

A vowed religious community is a not primarily a "performance organization", namely, one that has an obligation to deliver a known service like a hospital, school, homeless shelter, retreat house, or nursing home. All of the issues related to the realistic or defensive functions of strategic planning might indeed apply *to the ministry institutions* that are sponsored by the religious community. But when it comes to strategic planning *for the community per se*, some very different nuances come into play.

A religious community is not a business, although it has a mission to which it is committed. A religious community is not a family, although it is constituted by lifetime relationships. The religious congregation isn't a charitable workforce (employees as it were) of the church.

They are a group of persons who have individually and voluntarily committed their lives to God and to each other with a shared sense of mission that is expressed through the charism of their community. One can see God's abundant creativity at work in the many charisms that inspire the ministry of religious communities -- pastoral care, compassionate love, the education of the young, contemplative prayer, voice for the powerless, reverence for creation, etc. For vowed religious, their personal call is more than a job, and their unified action is more than a corporate organization.

This fundamental identity difference between vowed religious communities and what I refer to as "performance organizations" has a significant impact on issues of strategic planning, leadership and authority, decision making, conflict resolution, and group dynamics.

The distinction is further muddied because the *administrative infrastructure* that is necessary to support the life and mission of the community *is a performance organization!* This includes the office staff, finance personnel, and those responsible for the care of buildings or grounds, and potentially many more individuals.

The resistance to "corporate" mechanisms like strategic planning that arises within religious communities is partly attributable to their difficulty in differentiating the issues for which organizational management disciplines might be valuable, versus the kinds of issues for which communal processes of discernment and dialogue are more appropriate.

Leadership Structure: Leadership is called forth from within the membership.

Because of their leadership structure, the succession issues for a vowed religious congregation are completely different from those in a performance organization, which recruits and hires its leaders. Religious community leaders are elected or appointed for a defined term of office, after which the leaders return to their status as members of the community body.

While the religious community has a single "canonical" leader –that is, the responsible person with respect to the authority structure of the larger church – in actual practice most religious community leaders operate collegially within a team or council structure that collectively assumes responsibility for the leadership function.

There is a certain amount of prayerful discernment that takes place within the religious community in the process of electing its leadership for the next term, but the universe of available leader-persons is confined to the membership of the community. That tends to dash the illusion that a leader can be found who has all of the requisite knowledge and skills to deal with all of the burdens of the leadership role.

> *(Ironically, this is a more realistic basis for action than the hope for a superhero that often infuses executive search processes in large corporate organizations.)*

In this setting, the stressor that prompts the strategic planning activity certainly could be an anxiety about the capability of the leadership, but it could also be an anxiety that all members of the community share – namely, how to address known limits to their human or financial resources while living out their call.

Inherent Challenges to the Role Constrain Strategic Leadership

A number of factors present unique challenges to the strategic leadership role of elected religious congregation leaders: the dynamics of election cycles, displacement of reliability onto staff or processes, and cultural or personal ambivalence about the exercise of leadership authority. Unless they are managed with eyes open and courage, these factors can seriously constrain the capability of religious leaders to provide the necessary leadership to organizations facing planning and change.

ELECTION CYCLE DYNAMICS

The term of office produces an oscillating cycle of high and low levels of confidence in the authorization of the leaders – at its peak from early to middle in the interval between elections, and at diminished levels for those approaching election challenges or those holding lame duck status prior to installation of newly elected officers. Strategic planning must be timed so that the credibility and authority of the elected leaders is strong enough to validate the plan and

strong enough to invest the plan with communal authority past their own term of office.

<u>DISPLACEMENT OF RELIABILITY ONTO STAFF</u>

A second challenge is that systems with elected leaders are sometimes characterized by secondary staff structures with great influence. Perhaps as a reaction to the experience of fluctuating levels of leadership authority, organizations with elected leaders may develop an over-reliance on professional staff, standing committees, informal networks, consultants, or other parties that are perceived to have more reliable staying power than does the formal leadership cadre.

In such a situation, the process of strategic planning or the consulting resources engaged to lead it may become political footballs.

<u>CULTURAL AND PERSONAL AMBIVALENCE ABOUT LEADERSHIP AUTHORITY</u>

Specifically for religious communities, an added dynamic that exacerbates the stress on the leadership function is that some of these groups have strongly collegial and communal cultures that verge on having an antipathy to authority, even in its beneficent character. In such congregations, membership attitudes and behaviors constrain the level of authorization of the formally designated leadership, and make it very difficult for strategic direction or strategic issues to be framed and led by leaders. This is especially true where there has been a past history of oppressive and infantilizing authority. For example, the insistence on equalizing all team roles has the effect of rendering invisible the formal responsibility and service inherent in the role of "President" or "Provincial", a leader role that may only become critical at certain times, such as when under external (or internal) threat.

In these situations, strategic planning can seem attractive as a supposedly neutral vehicle for communal visioning and direction setting. The risk is that planning in that instance will take too long and will represent a much-diffused understanding of the critical challenges and necessary responses. A certain degree of passion, commitment, and voice may be lost.

The internal willingness of persons in leadership to take up their roles is likewise an intangible and critical feature of their strategic effectiveness, especially their capacity to provide reliable containment to others in the organization.

Leaders may fail to exercise the full authority and responsibility invested in their role under the mantra of having a collaborative style or with the stated view that their leadership is to facilitate the leadership of others. There is nothing wrong with a collaborative style, of course – it serves many leaders well under many conditions. The test occurs at those moments when the good of the whole would be best served by the designated leader taking the risk of making a decision or setting a direction. The leader who abdicates this role – as compared with trying to do it but not being very good at it -- has betrayed the organization's members and they usually know it.

This abdication may have a number of unconscious motivations such as fear of censure or catastrophic error. When it happens in faith based organizations such as religious communities, it may also signal that the individual leader may be over-identified with an image of goodness, unable to accept the aggressive dimension of authority and leadership that must be exercised in the service of the common good.

What all of these inherent challenges have in common is that they constrain the leadership container that is responsible for the strategic direction of the organization. *Strategic planning is always a tool, never a replacement for trust in*

the competence and intentions of the leadership and membership of the organization.

Inherent Gifts that Support Strategic Leadership

To offset these challenges, religious communities have unique strengths as well.

The value placed on communal discernment and decision making ensures the engagement and concern of all members of the community in important matters, and puts potential resources at the service of the community as a whole when they are needed.

The theological concept of "grace of office" is a providential blessing in religious community life. Both the leaders who are elected and the members who called them forth trust that the leading of God is accompanied by the grace-ful action of God, both within the leaders and within the community as whole.

The prayer life of the community and the spiritual maturity of its members can open the space for listening, for forgiveness, for the laying aside of ego and the humility to change. The anchoring of the community and its leaders in the regular practice of prayer and reflection are strong containers themselves, making it more possible for organizations facing difficult stressors to take up the work of planning with eyes open and without excessive flight to defensive rituals.

In the final analysis, strategic planning and the resulting strategic documents operate as instruments of collective thinking and visioning – mirrors of the wisdom that has been developed in the process. They have no magical power of their own, but serve the creativity, imagination, and faithful commitment of the organization members who create them. Done with faith and courage, strategic plans and related documents can be blessing.