ORGANIZATIONAL POLICY—AND SPIRITUALITY?

George Wilson

IT IS SAFE TO SAY that when we think of spirituality the idea of organizational policy is not the first association that enters our consciousness. Old habits of thought that keep the sacred and the secular in separate psychic boxes are hard to break. The reflections that follow are intended as one more corrective to the mentality that treats the development of organizational norms and expectations as 'merely' of this world and of little consequence to our growth in the life of the Spirit. In the broadest terms: how we as individual persons relate to the groupings (whether 'secular' or 'religious') to which we belong has a great deal to do with our lives as Spirit-empowered beings. And the policies that are meant to guide our relationships with organizations are of central importance.

The Basic Nature of Policy

Organizations are composed of many individuals who bring diverse attractions, desires, hopes and fears to the common life of the group. If the community does not create a framework of agreed standards for exercising membership, the potential for chaos and disintegration is always present. Organizations generate policies as a way of giving order to their communal existence. Policies give focus to the attractions that draw members towards shared goals; they also serve to protect the collective body from idiosyncratic energies that might dissipate the group's success in fulfilment of its vision and mission.

Policies make their impact on individual members' lives by defining the behaviours expected of them *as* members. As someone belonging to, say, the Church or a religious community, there are behaviours the body rightfully expects of me, as well as other behaviours that are frowned upon because they take energies away from the life and mission of the group, or even obstruct it. It becomes imperative that the framing of common

expectations be such as to promote both the achievement of group purposes and the growth of the individual members.

A Case Study in Wise Policy Development

At this point I would like to propose a particular illustration of wise policy development. After reviewing a bit of the history that led to the formulation of the policy we will be in a position to analyze the factors that make it an example of 'best practice'. Then it will be time to extract some of the issues of spirituality involved. The case involves the kind of poverty expected of Jesuits.

Readers of this journal may be familiar with the fact that when Ignatius and his first companions were discerning the kind of poverty to be expected of members of the new order they were clear that, since they were called to a new mode of apostolic companionship, the external forms expected of traditional religious orders would not fit. A new mission called for different norms and expectations. How were they to name standards for this new type of community? How would they pray? How would they appear on the street? And, for our purposes of our example, how would they view, and use, material resources?[1] As they prayed over their experience of this new form of apostolic life, the first Jesuits were led to an innovative approach. They would offer as a guide for Jesuits a concrete example of what a life of Jesuit poverty might *look like*. It would be something the members could immediately recognise and apply as they discerned specific choices they might confront in their daily life. Put simply, it came to this: if you want a standard for your decision about the use of material things, ask yourself this question—how does *a member of the diocesan clergy in your apostolic area* live out the gospel mandate of imitating the poor Jesus? Could a local diocesan priest afford the good that is being presented for your choice? If not, neither can you. Jesuits of that era would know from experience that the diocesan clergy enjoyed little social prestige and lived quite poorly indeed. The standard pinched.

Fast forward, then, to the close of Vatican II. As their way of implementing the vision of the council, all religious congregations were charged to return to their origins and re-evaluate their existing policies and rules. They were to review them in light of the 'signs of the times'. If the prevailing norms (which had been adopted appropriately, under

---

[1] Note that this is only a brief outline, not a scholarly account!

conditions perhaps centuries old) were found to be no longer suited to a mission redefined in light of contemporary conditions, new norms were to be adopted.

Like every other congregation or order, the members of the Jesuits' General Congregation then spent long days and weeks measuring the effectiveness of existing policies against greatly changed social conditions. One thing that had changed drastically was the social condition of diocesan clergy and, in particular, their economic status. Although there were variations in different parts of the world, priests were generally no longer poor wards living off the meagre offerings of a begrudging faithful. For the most part, entrance into the clerical state now meant becoming part of the middle class. The standard of poverty suited to life in 1540 would clearly not do for Jesuits in today's world.

But what might replace it? The delegates looked around for another standard, as concrete and easily accessible as the earlier formulation would have been for Jesuits of the founding generation. After considerable struggling (and only the delegates know how difficult the search was) the group was at last on the verge of agreeing on a new standard: the poverty of Jesuits in today's world should be that of a *family of modest means living in the geographic area where they were ministering.* A Jesuit, or a Jesuit community, could allow itself only the living standard that the ordinary folk of the area could afford.

There was a hitch, however. When the delegates prayed over that proposed standard, it did not lead to the consolation that should characterize the leading of the Holy Spirit. The delegates were not fully at peace. Something did not sit well.

So they went back to the drawing-board. Only after much further prayer and debate did the peace of the Spirit finally arrive. The standard would not be the lifestyle of a family whose means were merely 'modest'. It was, rather, a family of *slender* means. And so the norm stands today.

Why Is This Best Practice?

My purpose at this point is not to assess how *effective* the policy has proved to be in governing the discernment of individual Jesuits and their communities. My focus is not on evaluation of performance. It is rather on what the story might tell us about the nature of effective policy development. After we have teased out the elements that make it a model to be imitated we will be in a position to relate them to the sphere of spirituality.

Let us go back to the story, then. What does it reveal about policy and its development? Why should it be considered an example of 'best practice' in organizational development? The story reveals, first, a serious attempt by a body of religious men to listen to and respond in faith to the prompting of the Spirit of Jesus. This is an organization being true to its deepest genius (the *sine qua non* for any serious policy choice); they acted as men of prayer and obedience. The non-acceptance of the less stringent norm speaks to the integrity of the delegates. But this assessment might be considered merely pious (or even romantic) if the incarnational reality of the approach is left unexamined. Their prayer was not undertaken in abstraction from the community's social situation. It was entwined with serious reflection on the context within which they were discerning: the 'signs of the times'.

This defines a second characteristic of effective policy development. Policy that can serve the cause of wise discernment is not simply the statement of some timeless principles or values, as important as these are. Such principles represent things we all aspire to, such as love or justice or peace, to be sure. Their attractiveness elicits and stirs our energies. But, if they are left without further definition, they prove to be ultimately utopian in nature. In organizational parlance they are called *ultimate imperative goals.* They are like attractive stars, drawing us on but never to be reached. To serve the process of effective discernment in an incarnate world we need standards that are more focused, with *boundaries* that define and serve to rule out behaviours that are *not* what we are looking for. (It is helpful to remind ourselves that down through history the criterion of 'love'—or 'peace'!—has been used to justify every sort of inhuman and hateful behaviour.)

'A family of slender means' is a phrase that has boundaries. We can all easily agree on some choices that would lie far beyond the realm of
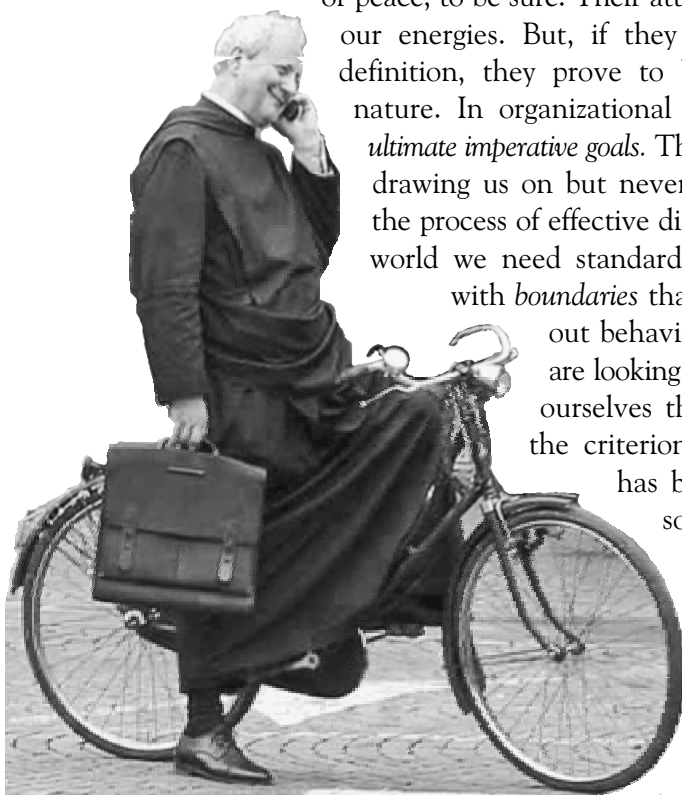
economic possibility for such a family. Some choices are clearly excluded. Families of slender means do not drive Ferraris or buy expensive wines. Of itself, however, the language of the standard does not preclude *all* disagreement. Reasonable men (we are talking about Jesuits) might apply the criterion with integrity and arrive at different conclusions as to the acceptability of particular options, even within the same set of cultural and economic conditions. A family of slender means *might* (in some parts of the world) be able to afford a car. But then again they *might* not; they might have to rely on a bicycle. Everything depends on context.

This fact reveals a further facet of sound policy development. Effective policies provide members of an organization with enough specificity to facilitate the process of choice; but *they do not make the decision for us*. This brings further consequences for community members. First, in the face of an incarnational choice I retain personal responsibility for *the way in which I apply* the criterion. And second, another companion might, with equal integrity, reach an entirely different conclusion about the same choice. Within the same community individual members might disagree about the appropriateness of a particular choice.

There is one more implication to be considered. Governance by policy involves a risk assumed by the leadership. The effectiveness of the norm depends not only on clarity of formulation but also on the personal maturity and integrity of the individual member who must apply it. The fact that wise policy leaves room for such difference of interpretation can be very unnerving for some individual members (or for whole organizations, as a matter of fact). Their need for clarity can apparently only be satisfied by uniformity. For such people, to allow for personal judgment is to guarantee chaos. I am reminded of every adolescent's query about sex: 'Tell me how far I can go'.

Governance by Rules

The full implications of governance by means of policy are revealed when we compare it with the attempt to govern by the promulgation of *rules*.

A rule is different from policy in that it removes all possible room for discretion or interpretation. To declare that every member will have an allowance of 'X dollars per month' is quite a different matter than to say that each one is to live like a family of slender means—even though the actual economic outcome might turn out to be exactly the same. A rule is self-interpreting. It does not merely offer a standard for judgment.

The basic commitment to membership in the group becomes identified with a specific behaviour: *the rule makes the choice for me*. Under that understanding of governance, leadership is equated with making rules; membership is reduced to enacting the very specific choices made by others.

At this point in our reflection we can begin to explore questions of a more directly theological—and specifically Christian—nature.

Theological Reflection

When an organization—however secular or religious—attempts to determine the normative behaviours it will expect of its members, it necessarily (though perhaps only implicitly) discloses its convictions about a number of significant issues that fall under the rubric of 'theological anthropology'. How does it conceive of the nature of human freedom? What is the goal of human growth and development? What does 'maturity' look like? How should individuals and the communities to which they belong relate to one another if the relationship is to be mutually beneficial?

The anthropology that is at stake for Christians, in particular, is further specified. It engages questions such as: what is our Creator's intent in creating free human persons and communities of such persons? How does human development and maturation relate to notions such as the Kingdom of God or salvation? What role should the human example of Jesus and his relationship to authority play in defining effective governance and integral membership? Where do sin and its corporate effects come in? To explore all such questions would require a whole *Summa*. It is surely beyond the scope of this piece. A few modest tracings will have to suffice.

Some Possible Implications for Life in the Spirit

It is a central tenet of Christian anthropology that we are created in the image and likeness of God, which further means that we are not puppets but endowed with freedom. That freedom is limited in its scope, to be sure; we are not God. And it is further hobbled by our wilful misuse of that gift: by sin. The fact remains, however, that God's loving, creative response to our sin is not to *take away* our freedom (and therefore our responsibility), but rather to *enhance* it by supplying the grace to use it responsibly even in its weakened condition. The issue for organizational governance becomes: how are we to fashion organizational norms that respect that

notion of human freedom—created but wounded—and, with the help of God's grace, support its responsible exercise?

For free persons wounded by sin, the attainment of mature responsibility is not given at conception or birth. It happens only through the experience of small successes and failures. We humans do not ordinarily enjoy the gift of infused holiness. Its achievement is at best a lifelong, trial-and-error enterprise. To the extent that an organization attempts to eliminate all chaos by imposing black-and-white rules it deprives its members of the potential for growth presented by the real possibility of poor choice. A Christian view of things embraces the idea that sin and failure, though real, are not ultimately victorious. Focusing our efforts on preventing them represents a failure to respect the creativity of a God who not only does not fear the destructive potential in giving humans freedom but positively endows us with that radical possibility. In the *Exsultet* proclaimed at the Easter Vigil the Church issues a shocking challenge by describing the 'original' sin of Adam and Eve, with all its disastrous consequences, as a 'happy fault'. Fault and blessedness are apparently not incompatible.

Sin and failure, though real, are not ultimately victorious

The attempt to govern by rules reveals a fearful lack of trust in the loving creativity of the God who brings life out of our deaths. It assumes that the members who are supposedly adults making a free commitment to the organization and its mission are actually children who will act irresponsibly unless their capacity for personal discernment is curtailed by a controlling parent. (The irony is that it is the parent–child model itself that engenders either childish dependence or irresponsible acting out.) Members of a healthy organization are not children and deserve not to be treated as such.

Although the attempt to govern by rules confers the benefits of order and coherence on the life and mission of a community, it comes at the cost of growth in human maturity. Wisdom gained over centuries would seem to teach us that movement towards full maturity only occurs in a climate that allows for the possibility of mistakes, of sin and failure. As an old saw has it: 'Where does wisdom come from? From making good choices. But then how we learn to make good choices? From making bad choices.' We are a wounded race. We are not ordinarily gifted with infused insight. One of the remnants of original sin seems to be that wisdom comes only through the experience of failure.

And Jesus Weighs In

And how, finally, does Jesus view the matter? In the parable of the wheat and the weeds he gives us an important clue as to his understanding of the approach of the One he called 'Father'. Remember that the landowner in the story had sowed only good seed. Then, when the servants inspect the fields, they discover that a strain of weeds has grown up in the middle of the good wheat. These underlings are disturbed at the unanticipated arrival of weeds; it surely could not be their fault, it must have been the skulduggery of a competitor. They want the owner to let them pull up the weeds, *in the middle of the growing season*. The harvest must be *perfect!*

But the wise owner will have none of it. In the real world, weeds are going to show up. The landowner commended by Jesus knows his business: he stays focused on the continued growth of the wheat. The sorting can take place later. It is a foolish leader—or organization—that diverts the energies of members away from its real mission and wastes them instead on the (ultimately futile) project of stamping out all errant behaviour.

The parables of Jesus are much like good policy: they point us towards timeless values but then invite us to pass through the narrow gate of personal responsibility for our choices. They respect our dignity as images of a creator God. Jesus does not tell us what is wheat and what is weed in any concrete situation. He trusts us to find that for ourselves—even in the face of foolish and sometimes sinful choices in our past.

One final consideration: Jesus gave us concrete images for our interpretation and application. But he also left us with something even richer and more powerful than that. What he taught by parable he *embodied* in his own relationship to the religious institutions of his day. He was the best sort of teacher: one who models the ideals he proclaims—even to death, as a lawless criminal. The gate of personal responsibility is narrow indeed.

George Wilson SJ is a retired ecclesiologist and church consultant living in Cincinnati, Ohio.