ORA ET LABORA

A SPECIAL ISSUE ON

## Faith and management (SIBRM8)

ORGANIZED BY

**PROFESSOR VOLKER KESSLER**

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# INTERNATIONAL JOURNAL OF BUSINESS RESEARCH MANAGEMENT (IJBRM)

**A SPECIAL ISSUE ON**

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(SIBRM8)**

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# INTERNATIONAL JOURNAL OF BUSINESS RESEARCH MANAGEMENT (IJBRM)

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# EDITORIAL PREFACE

By Chief Guest Editors
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Nothing is more closely associated with the age of modernity than the belief that the world can be structured or organized. Whereas in ancient times, myths, religions and traditions determined a person's position in society and the scope for autonomy, in modern times a general skepticism and rationalism took centre stage, empowering people more and more to take their fate into their own hands. As a result, the new post-religious meta-narrative of science emerged. Not faith but reason formed the basis of social integration and in this fairway industrialization, mechanization, economization and managerialism emerged as a process of shaping the world. There is no doubt that without the experience of its rational controllability, our world today would be a more backward and probably poorer world. At the same time, however, we have known for a long time that modernization seems to have reached its limits, which is discussed in detail in the academic discourses on reflexive modernization or post-modernity that speaks of the end of all meta-narratives, including science itself. Because there are no longer any dominant positions from which our world can be deciphered, the question arises anew today as to the relationship between reason and faith.

Against this background, the editors would like to explore the dynamics of reference between management and faith and ask whether these two fundamentally different categories are capable of becoming productive for each other. If it is true that, from a postmodern perspective, neither reason nor faith can claim to interpret the world correctly on their own, then it would be worth investigating whether and how these two perspectives can benefit from each other. Current management theories have long since distanced themselves from a too rationalistic variety of management concepts based on causality and linearity alone. Instead, they are already looking at holism, multi-rationality and unavailability. Tolerance of ambiguity and the ability to deal with ambivalence seem to be among the most important management competencies for a complex society and an open and uncertain future. Faith (no matter in which philosophical or religious tradition it feels at home) would sometimes have an important contribution to make to this. However, the reverse is also true: Faith never manifests itself only in immediate human relationships, but needs forms that have to be organized. It therefore always finds expression in organizations such as churches or hospitals. They too are managed and built on rational decision-making principles. To better understand this particular dynamic is the guiding interest of this special issue.

As one of the two editors of this Special Issue, Volker Kessler first deals basically with the reciprocal relationship between faith and management. In his contribution, he asks about the reciprocal dynamics that faith has on management in organizations and how faith is influenced by the fact that it is always also "organized faith". In another keynote article, co-editor Stefan Jung addresses the question in how far a leadership that is itself grounded in a spiritual practice is suited to deal with ambiguity and contradictoriness in everyday management. The article argues that faith should not be understood as something irrational per se, but as a helpful corrective against managerial and rationalistic hybris. In the third article, Markus Warode tries to make Franciscan spirituality fruitful for the topic of self-leadership. The contribution takes a more historical approach, asking what modern management methods can learn from an 800-year-old spiritual practice. The next two articles orient their questions more towards so-called diaconal or faith-based organizations and relate the connection between faith and management more to organizational practice. First, Steffen Flessa asks under which conditions Christian organizations

succeed in aligning their decisions with Christian principles. He argues that the production portfolio is the main criteria to determine whether a Christian NPO is following Christian principles in its management at all. Then Matthias Höhne explores the challenging cooperation between faith-based development organizations (FBDOs) and institutional donors. He argues that FBDOs need to find their "right-sized", contextualized faith by understanding their unique developmental and spiritual contributions and the challenges they face. The sixth article shifts the perspective to theological training institutions. Johannes Schröder asks what consequences arise when management methods are used in the context of a theological seminary. The final article takes a more practical and also a rather unusual perspective when Emanuel Kessler asks what agile teams can learn from the influential Narnia tale by British author C.S. Lewis. The contribution inspires to relate the life-serving principles found in all religions and faith traditions to management practice and thereby normatively challenge it.

It is now the case that each author of this special issue has a Christian background. That was not intended by the editors, but it has turned out that way. So, strictly speaking, it has become a special edition of 'Christian Faith and Management'.

As editors, we would like to thank all authors very much for taking part in this Special Issue. The works on the topics and the accompanying discussions have been very inspiring. Furthermore, we would like to thank all the reviewers who, through their critical feedback, have helped to clarify and improve the articles published here. As usual the names of the reviewers are not revealed. And thanks to the editor of IJBRM for giving us the opportunity of editing a special issue on 'Faith and Management'.

We wish all readers an insightful reading of the articles gathered here on an important topic with a potential for future discourses as well.

# On the Reciprocal Relationship between Faith and Management

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## Abstract

This article describes the complex reciprocal relationship between faith and management. Firstly, faith-based organizations have to be managed. Some management methods will foster the faith; others will affect the faith negatively. Each faith group will have to look for management methods suited to the specific faith of that group. Secondly, faith has an influence on management. This can happen implicitly or by intention. An example of the latter is when managers just copy concepts from a faith group because of their success, without necessarily sharing their faith. Or it happens when believers want to implement the standards of their faith at work. The concept faith@work can be problematic if it is a single-faith approach within a secular work environment because it might lead to injustice. Due to the reciprocal relationship between faith and management, we can discover the re-entry of religious terms or concepts: these terms originate in Christian faith, enter the management sciences and from there re-enter the Christian faith. The examples "servant leadership" and "vision" show the subtle change of meaning that occurs when words wander between the two worlds, thus becoming "false friends" to the faith group.

**Keywords:** Economic Theology, Faith-based Organizations, Faith@work, Servant Leadership, Vision.

## 1. A RECIPROCAL RELATIONSHIP

This special issue is entitled "Faith and Management", and this article provides a bird's-eye view of the complex relationship between faith and management. Each influences the other, and in addition, sometimes the influence of one field on the other comes back like a boomerang. The intention of this article is not to study a certain issue in detail but to provide a survey of the reciprocal relationship between faith and management. Thus this article contributes to the area of "economic theology", defined as "the study of the forms of interactions between theological imaginaries on the one hand, economic thought and economic-managerial practices on the other, both past and present" (Schwarzkopf, 2021, p. 4).

Section 2 is on the influence of management on faith-based organizations. Where does management foster faith, and where does it affect faith negatively? Section 3 is on the opposite influence: How does faith influence management science and management practice, either indirectly or by intention? Then section 4 discusses two examples of re-entry, where terms or concepts from religion have entered into management concepts, and from there influenced faith-based organizations.

The intention of this article is to make the mutual influence transparent. I will give examples of each kind of influence. Given the wide scope of this article, the choice of literature can only be eclectic. Since my personal background is in Christian theology and Christian FBOs, the majority of my examples will be from this faith tradition. This is admittedly a limitation. On the other hand, the management sciences originated in the Western world and are still very much dominated by Western-oriented scholars. Since this part of the world was and still is strongly influenced by the Christian worldview, the mutual influence between Christianity and management science is especially strong.[1]

This article stresses the reciprocity of the relationship between faith and management. Dyck (2014, p. 25) explicitly studied one direction, the effect of religion on management. The *Routledge handbook of economic theology* (Schwarzkopf 2021) in turn looks at both directions, "theological concepts and their economic meaning" (part 1) and "economic concepts and their theological anchoring" (part 2).

## 2. MANAGING FAITH-BASED ORGANIZATIONS
### 2.1 Good Management Helps Faith Groups to Grow and to Remain Viable
Basically this section is about "organizing God's work" (Harris 1998). In general, a faith-based organization (FBO) is an organization which has a mission linked to a certain faith; its values are based on that faith; and its members are usually from that particular faith group. According to Ferris (2005), faith-based organizations can be characterized.

> …by having one or more of the following: affiliation with a religious body; a mission statement with explicit reference to religious values; financial support from religious sources; and/or a governance structure where selection of board members or staff is based on religious beliefs or affiliation and/or decision-making processes based on religious values. (Ferris, 2005, p. 312)

Often, a new faith or a new congregation comes to life through a charismatic person and starts as an unstructured movement. The founder generation does what needs to be done. However, when the movement starts to grow, it needs to be structured, and management processes have to be installed – like in any other growing movement.

A typical example is provided by the early Christian church (New Testament, Acts 6:1-7). The Christian movement had started in Jerusalem and attracted more and more people. In the beginning there were Hebrew Jews and Grecian Jews. Unfortunately, the widows among the Grecian Jews were overlooked in the daily distribution of food. This led to complaints. Apparently, the apostles' workload was too high, and they accidentally overlooked this group. The solution was to select seven deacons who would distribute the food, so that the apostles could focus on their responsibility as spiritual leaders. This example from early church history is in line with Greiner's observation about crises in growing organizations. Tasks have to be delegated, and then management processes have to be implemented (Greiner, 1998). In this case a simple management method helped the faith group to cope with a growing number of disciples.

Five centuries later, Saint Benedict wrote rules for living and working within a religious community (Benedict 1981). This Rule of Saint Benedict can be regarded as the first handbook on Christian leadership and has greatly influenced Western monasticism.

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[1]Pattison (1997, p. 172 footnote 10) indicates that it might be worthwhile to write a comprehensive history of the interaction between Christianity and management.

It is a truism that all FBOs have to be managed, but the degree of management might differ from faith group to faith group. For example, the Methodist Church, as its name suggests, is known for clear structure, whereas the Brethren movement used to be more skeptical of structure and tried to avoid management where possible. Sometimes Christian groups see a tension between management and the work of the God's Spirit.

## 2.2 Special Management Methods for Faith-based Organizations

It must be asked whether a FBO should be managed in the same ways as any other profit or non-profit organization, or whether the faith of the members should influence on the selection of management tools.

First of all, the faith usually has an influence on the mission statement of the FBO. What is it for? Why was this FBO founded? Usually the mission of the FBO is derived from the faith it is based upon. Sometimes a narrative from the faith tradition becomes a leitmotif for their work. For example, a painting depicting the parable of the Good Samaritan hangs in the entrance hall of the Mbesa Hospital in Southern Tanzania (Mbesa Hospital 2022).

But as rightly stated by Flessa (2023) it is not only about "what the FBO does" but also "how the FBO does it". One would expect from FBOs that they behave coherently with their religious values, whether one agrees with their values or not. The above-mentioned characterization of FBOs ends with the statement that "decision-making processes are based on religious values" (Ferris, 2005, p. 312). The influence of the faith on the decision-making process can result from ethics or from spirituality. For example, Gehra (2009) did an empirical study in 32 Benedictine monasteries in Germany, Austria and Switzerland. He investigated the influence of the Benedictine faith and spirituality on personnel management and daily economical decisions.

Decision-making in an FBO usually starts with an ethical evaluation of the alternatives. It may be that after this ethical filtering, there are still some alternatives possible. Let us assume that from an ethical point of view the remaining alternatives A and B are equally good (or equally bad). How does faith influence the decision after the ethical evaluation has been carried out?

Here the question of spirituality might become relevant. Is there a "divine interaction" that would lead to alternative A instead of B? Although many organizations claim to be "faith-based", often the spiritual elements are left out in their daily decision-making processes. The German Protestant author Kusch (2017, p. 4) notes that the management tools used in Christian organizations are often "atheistic". It is like a "book-cover spirituality" (Kessler, Knecht & Marsch, 2021, p. 188): one prays in the beginning and at the end of a meeting but then spirituality is abandoned for the rest of the management meeting. Kusch (2017) therefore suggests 45 tools for integrating spirituality into popular management tools. Kessler, Knecht and Marsch (2021) present case studies on three international Christian FBOs and their attempt to bring spirituality into their decision-making process, the Jesuits, the Salvation Army, and the Wycliffe Global Alliance.

## 2.3 Some Management Methods might Affect the Faith

Although it is clear that FBOs must be managed, it must also be noted that not every method will fit into the context of an FBO. Some management tools will foster the faith, especially if one explicitly integrates the values and the spirituality of that particular faith (section 2.2). But in some cases, management methods might have negative effects on the practice of the faith or even, in the long run, on the doctrines of the faith. For this reason, Webster (1992) is very critical of church marketing. Is it legitimate to sell the gospel like a product? Would such an approach change the content of the gospel?

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To illustrate the possible negative consequence of a management method which is applied uncritically, let us look at a typical system of compensation for salespersons. Their salaries often depend on their sales figures. Someone might get the idea of applying this method to a pastor's salary (I know church people who have had this idea!). They argue that a pastor is, among other things, responsible for marketing the gospel. However, according to Christian doctrine, no human being can bring another human being to faith. This is illustrated by a metaphor: human beings can plant and water, but only God gives growth (New Testament, 1 Corinthians 3:7). Thus the idea of giving an incentive to the pastor for each new convert would contradict the fundamental belief that only God's spirit can create faith. (Unfortunately, there are indeed pastors or evangelists who regard evangelism as business and become multimillionaires. They abuse religion in order to amass wealth!)

Generally spoken, management methods are good to improve on efficiency. But for many church members the congregation is like a family. For them relations are more important than results, and some management methods could change the atmosphere of a congregation to their disadvantage.

## 2.4 Conclusion
From these examples it can be deduced that some management methods are not suited to certain FBOs because they would affect or even change the faith. FBOs should critically evaluate any management methods they are considering as to whether they will foster or negatively affect their faith. They should especially look for methods which allow them to integrate the ethics and the spirituality of their faith.

# 3. FAITH INFLUENCING MANAGEMENT SCIENCES
Obviously, faith has an influence on management theory. We can distinguish between three variants of influence. The first sort of influence "just happens". It is not intentional, it happens simply because the word view of the dominating faith system has an influence on the managers or the management scholars. In other cases the influence is intentional. Here we can again distinguish between two sorts. In the first, management people copy tools or processes from a faith group even though they do not necessarily share the faith of this group, because the tools have proven successful. In the second, believers of a certain faith explicitly want their business and management style to be shaped by their faith. In the following sections the three variants are described: implicit influence, intentional copying from faith, and implementing faith.

## 3.1 Implicit Influence
I will discuss three examples where faith has implicitly influenced management or economics studies. A well-known example in economics is Adam Smith's metaphor of the "invisible hand" in his inquiry about the wealth of the nations, published in 1776 (Smith, 1976, p. 456). There is a lot of debate about this metaphor (e.g. Rothschild, 1994; Oslington, 2012; Hill, 2021). Although Rothschild (1994) opts for an ironic understanding, the majority of Smith's reader assumes that the invisible hand refers to a divine hand (Oslington, 2012, p. 430). Oslington (2012, p. 432) argues that this metaphor is rooted in Calvin's doctrine of providence, mediated through the Presbyterian Church which dominated Scottish life in the eighteenth century.

Probably the most prominent work on the influence of religion on economics is the famous book *The Protestant Ethic and the Spirit of Capitalism*, which was published in 1905 by the German sociologist Max Weber (2000). Weber argues that Protestantism in its ascetic forms like Calvinism was a driving force in the rise of market-driven capitalism (Weber, 2000, p. 53). Irrespective of whether one agrees with Weber's conclusions, it must be acknowledged that Weber's book had a great influence. Since Smith's metaphor of the invisible hand and Weber's

book have already been discussed at length in other places, I will move on to an example where the Christian influence has received less attention.

Let us have a look at Douglas McGregor and his famous distinction between *Theory X* and *Theory Y* for leadership, which goes back to the 1950s (McGregor, 1985). "McGregor stressed the fundamental importance of dealing with the human side of enterprise" (Heil et al., 2000, p. 4). He noticed that leadership styles of managers are affected by the way they look at their subordinates. Theory X and Y represent different views of human beings. Leaders who – implicitly or explicitly – share the assumption of theory X that people are lazy, will try to motivate people by extrinsic factors (the "carrot-and-stick" method). Theory Y assumes that human beings are intrinsically motivated to work and thus need a different leadership style from "command and control". Since 1960, Theory Y has become an implicit basis of modern leadership concepts, which is stated by the leadership expert Bennis: "Just as every economist, knowingly or not, pays dues to Keynes, we are all, one way or another, disciples of McGregor" (McGregor, 1985, p. vi). (Note the religious language of discipleship!)

In management literature, theory X is often identified with Taylorism. This is true, but it is not the full truth. There is also a strong religious element in it. McGregor himself gives a little hint:

> The assumption has deep roots. The punishment of Adam and Eve for eating the fruit of the Tree of Knowledge was to be banished from Eden into a world where they had to work for a living. (McGregor, 1985, p. 33)

A look into McGregor's life reveals more about the Christian influence. McGregor grew up in a family that was strongly influenced by Calvinism. His grandfather founded the McGregor Institute, a missionary station in Detroit. Douglas' father became director of the institute. McGregor's widow wrote about her father-in-law: "Dad held strong religious beliefs" and he was very pessimistic "in respect to man's potential goodness and strength, which Doug continued to challenge in his work and writings" (Bennis and Schein, 1996, p. xi). By establishing theory Y, Douglas McGregor challenged the religious belief of his father. McGregor once mentioned in a private talk that theory Y might be an avoidance mechanism for his own rebellion (Weisbord, 1987, p. 115). So there is provably a strong influence of Calvinistic faith in the establishment of theories X and Y. McGregor identified theory X with Christianity because of the religious context in which he grew up.

Other authors argue that the biblical teaching is much closer to theory Y than to theory X (Kessler, 2007). No matter whom you agree with, this example shows how faith can implicitly influence leadership. The German author Rothlauf (1999) has a section about the influence of religion on leadership behavior with examples from Buddhism and Islam.

### 3.2 Copying from Faith by Intention

A prominent example of management copying methods from FBOs is the book *Selling the dream* by the former Apple marketing specialist Kawasaki (1991). Kawasaki's idea is that salespersons can learn from evangelists and their enthusiasm because their goal is to get people to believe in their product or idea (p. vii). According to Kawasaki (p. 4) "evangelism is the process of selling a dream". His whole book is structured around evangelism, and Kawasaki became famous as Apple Chief Evangelist. Kawasaki was impressed by the methods of some Christian evangelists and adopted them for Apple. As far as we know, Kawasaki did not show any interest in the Christian faith as such. Kawasaki's approach found many followers, so that today the job title "technology evangelist" is very common in the IT industry.

The British theologian Pattison claims that "management is a kind of religion" (Pattison, 1997, p. 5). His evidence for this statement falls into three categories: firstly, the faith assumptions of

management (pp. 28–34), secondly, the religious style and order of management (pp. 35–38), and finally, the use of religious language in management theory and practice: "The overtly religious nature of management reaches its apotheosis in some of the language that is used. Here evangelical revivalism appears to have unbridled sway" (Pattison, 1997, p. 39). Pattison refers to the religious terms "vision", "mission statements", and "doom scenarios". One could also add "evangelists" and "metanoic organizations" (Kessler 2017). Pattison explains this phenomenon with the history of management science. Management as a discipline started in the US, which is very much influenced by Protestantism (Pattison 1997, p. 47). Unlike the European churches, no religious denomination in the US had an official link to the state. Various religious groups had to compete with each other to attract new members, thereby establishing a marketplace of faith. Religion had to be marketed – and thus religious activity was seen as a good preparation for business (p. 48). The historical analysis of Moore (1995) showed that already in the 18th and 19th centuries there was a reciprocal relationship between business and religion in the US. Religious leaders borrowed commercial practices to promote religion, and business leaders learned from religious leaders to promote commerce.

> US management gurus like Tom Peters who charge people high fees to attend 'revival' meetings at which … they basically tell people what they already know. The modern management guru seems to imitate his nineteenth century forebears in almost every detail – even down to providing the souvenirs and follow up materials that Moody and Sankey sold to their enthusiastic audiences. (Pattison, 1997, p. 49)

Still, today the religious language in management parlance is often quite irritating to European academics. Neuberger (2002, pp. 196–197) especially mocks the religious language in writings about charismatic and transforming leadership.

Another example of copying from FBOs is the practice of ascribing to business leaders the attributes of spiritual leaders like "saints" (Alvesson, 2011) or "priests" (Hatch, Kostera & Kozminski, 2005; Ruth, 2014). A modern hagiography is created in which management gurus and successful CEOs take a role borrowed from the saints of the Catholic or Orthodox church. (Is it because there are no saints in the Protestant tradition that the management authors, often socialized by Protestantism, look for saints in the management context?)

### 3.3 Implementing Religious Values and Spirituality in Management

In the examples of the previous section the motive for copying from FBOs was simply the success of these concepts in faith groups. The authors did not intend to implement faith in the workplace. In this section we will look at those who explicitly want to implement religious values and/or spirituality in the normal workplace. Thus it is not about Christian management of a Christian organization or Buddhist management of a Buddhist organization (the topic of section 2.2), but about *Christ@work*, *Buddhism@work* (Marques 2012) etc.

Historically, the influence of Christianity on management has been very strong. Today, many religions contribute to management study. In a study, Dyck (2014) summarizes what the five religions, Buddhism, Christianity, Confucianism, Hinduism, and Islam have to say about management in secular management journals. Dyck introduces a distinction between religious views that would support mainstream management and those that aim to liberate management from the mainstream (p. 30). Examples of recent publications are Ng (2019) about servant leadership from a Buddhist perspective, and Sinha (2021) about the contribution of the Indian Vedanta to management ethics. Zweifel and Raskin (2008) show a Jewish perspective on business leadership. In the following I again focus on Christian approaches, partly because of my personal background and partly because of their dominance in history.

Mele and Fontrodona (2016) argue that "Christian ethics applied to economics and business has a long tradition". Several Catholic theologians, including some Popes, contributed to this. For example, the Catholic authors Alford and Naughton (2001, p. 212) offer a "Christian spirituality at work" by implementing Christian social principles in modern organizations.

There are several contributions from the evangelical stream of Christianity. Evangelical approaches are often characterized by a strong missionary zeal. Many contributions are either authored by Americans or at least influenced by the American evangelicalism. For example Jones (1995) recommends learning from Jesus as CEO. The entrepreneurs Knoblauch and Opprecht (2003) tried to bring the idea of "kingdom companies" (2022) to the German-speaking countries. The idea of the kingdom-companies approach is not only to learn from Jesus, but to act as if God/Jesus *were* the real CEO.

In their survey of spirituality in the workplace, Mitroff and Denton (1999) discovered five models. The above-mentioned "kingdom companies" would fit into the category of religion-based organization with the mission of taking over one's company for Christ (pp. 57–75). Although Mitroff and Denton advocate spirituality in the workplace, they distance themselves from such a single-faith approach (p. 8).

Indeed, the single-faith approach in a secular workplace brings several ethical conflicts. It is fully reasonable and legitimate for FBOs to require that the staff members with leadership responsibilities be members of that particular faith group. But one should be careful about transferring this principle to the secular workplace. Although advocates of *faith@work* argue that *faith@work* will enforce ethics and moral values, a single-faith approach might even lead to injustice, as described by Marques (2012):

> In workplaces, particularly, the exhibition of one religion especially by leading individuals can quickly create inhibitions among workers who maintain other beliefs, … Consequently, it could lead to alienation and the well known and highly despised in- and out-group situation, whereby adherents to the leader's religion would become part of the in-group, and all others would remain in the out-group. (Marques, 2012, p. 541)

I live in a part of Germany that is strongly influenced by the Protestant pietistic movement. In our area, with a radius of 70 km, there are several family businesses owned and run by committed Christian businessmen (yes, men only). On the one hand, these family businesses are known for high ethical standards and reliability, and they are quite successful. On the other hand, it is an open secret that in order to get promoted to the inner circle of leadership, one should belong to the specific Christian denomination to which the CEO belongs.

In a pluralistic, multi-religious society we cannot allow a single-faith approach in the workplace. We have to aim for a multi-faith approach at work, and we have to ensure that an employee who does not share the leader's faith is disadvantaged. Lips-Wiersma et al (2009) mention further possible negative implications of the workplace spirituality movement.

### 3.4 Provisional Summary

It has been shown that the relationship between faith and management is indeed reciprocal. The following diagram is a summary of the different links, as discussed in sections 2 and 3:
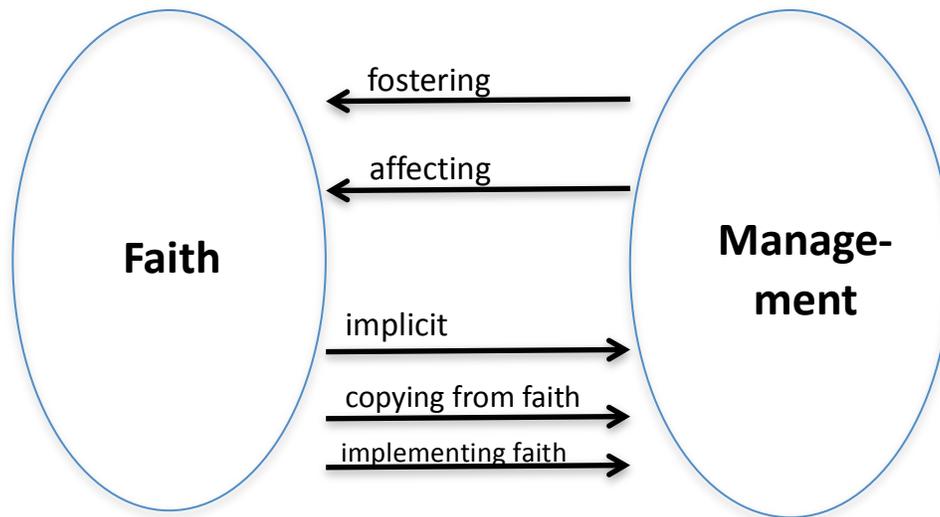


**FIGURE 1:** Five links between faith and management.

## 4. RE-ENTRY OF RELIGIOUS TERMS

So far we have studied some links leading from management to faith (section 2) and some leading from faith to management (section 3). It becomes even more complex if a term from one area is transferred to another area and then returns to the first. As a term wanders between the worlds, its meaning might change, and this might lead to some confusion. This effect will be illustrated by the terms "vision" and "servant leadership", which appear both in Christianity and in management literature.

### 4.1 The Concept of "Servant Leadership"

The idea of a leader with the attitude of a servant has a long history in both the Jewish and in the Christian faith. For example, Moses and King David are regarded as two great leaders in the Old Testament, and both leaders are praised for their humility (Old Testament Numbers 12:3) and their serving attitude (Exodus 31:32; 2 Samuel 23:14-17). In the New Testament Jesus himself taught his disciples that "whoever would be great among you must be your servant" (Matthew 20:26, English Standard Version). Obviously, this Bible verse could be a starting point for the theory of servant leadership.

However, the term "servant leadership" is used neither in the Bible nor in Christian literature until 1970. This term became known through the writings of Robert Greenleaf (1977) who published an article "The servant as leader" in 1970. Greenleaf wrote for a secular audience. And although he himself belonged to the Quakers, a special Protestant community (Greenleaf, 1977, p. 29), it was not the biblical stories that gave Greenleaf the idea of servant leadership but a novel written by German author Hermann Hesse (1877-1962). (It must be noted that Hermann Hesse grew up in a pietistic household and, although he drew many ideas from Hinduism and Buddhism, the influence of his Christian heritage is strong in his writings.) Due to Greenleaf's writings, the notion servant leadership has become quite popular among both scholars and practitioners. There is a separate chapter on it in Northouse (2019, pp. 347–390). As the list of contributors in Bouckaert and van den Heuvel (2019) shows, servant leadership is discussed by atheists, Buddhists, Christians, Hinduists etc.

After Greenleaf, the term "servant leadership" also entered the literature on Church leadership (e.g. Böhlemann & Herbst, 2011, Detje, 2017). The challenge is now the following: servant leadership is a concept that can easily be traced back to the Bible, even though the Bible does not use the term. It became popular in the management world, and from there it entered Christian literature. Christians who read the term "servant leadership" in a text might automatically identify it with the New Testament teaching on servant leadership. But it is very likely that the author of the text has an interpretation in mind that is different from the Christian understanding.

Although Greenleaf was a Quaker, his understanding is slightly different from the New Testament teaching. Both concepts hold that a leader should be a servant to his or her people. But according to the New Testament a Christian leader is first of all a servant of Christ (1 Corinthian 4:1), putting God in the first place and obeying God rather than other human beings (Acts 5:59). Greenleaf does not mention this vertical aspect of serving. But obedience to God might be an important issue in situations where church members ask for something that would contradict the divine command. Thus the faith group should be critically aware of the meaning of a word used by an author, even if it sounds familiar.

## 4.2 The Term "Vision"[2]

The word "vision" is one of the most popular management terms of today, being almost omnipresent in current management talk. Many ask for "visions", "vision statements", and "visionary leadership" (e.g. Nanus, 1992; Menzenbach, 2013). "Vision" is often connected with charismatic leadership and transforming leadership. According to Kiefer and Senge (1981, p. 9) "the notion of a vision for an organization has not been common to management parlance" until 1981. Shipley (2000) did an extensive study of the origin of vision and visioning in planning. He also states that "talk of vision became wide-spread after" the mid-1980s (p. 225).

The idea of vision was popularized by the management bestseller *Leaders* by Bennis and Nanus (1985). These two authors interviewed 90 managers and then deduced four key strategies for successful leadership, the first key strategy being "attention through vision" (p. 87). Leaders should have a clear vision of the future state of their organization, and this has to be an attractive and realistic image. Vision used to be a spiritual term, and Bennis and Nanus saw a clear link to spirituality: "by focusing attention to a vision, the leader operates on the emotional and spiritual resources of the organization" (p. 92). Not many management publications mention a link between vision and spirituality.

Originally, the word "vision" was connected to religion and spirituality, meaning a divine or at least spiritual revelation, mediated by prophets, seers and shamans (Hoheisel, 2005, p. 1127). These visions sometimes referred to the future and sometimes not. In the Bible we find examples of both types. Nehemia's vision of a new wall around Jerusalem referred to a future state (Old Testament, Nehemia 2:12.17.18). But Peter's vision on the roof was just a divine teaching lesson for him (New Testament, Acts 10:9-17a). The Bible also warns against false visions proclaimed by false prophets.

Today we encounter three different meanings of the term "vision"

1 Spirituality, religion: Divine revelation
2 Psychology: Sign of illness, madness
3 Management literature: Description of a future state

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[2]The discussion in section 4.2 is partly drawn from (Kessler, 2017).

It is interesting to trace the re-entry of the term "vision" into church vocabulary. Church leadership, a sub-discipline of practical theology, is naturally influenced by management sciences. Thus the word "vision", originally church language, then adopted by management theory, re-entered church vocabulary. One exponent of modern church leadership is the American Willow Creek Church with its leadership conferences allover the world. Bill Hybels, its well-known founder, gives vision first place on the list of characteristics leaders should have: "A leader's most potent weapon: the power of vision" (Hybels, 2002, p. 29). The German theologians Böhlemann and Herbst (2011, pp. 31–36) also emphasize the importance of vision for church leadership.

The problem is now the following: people use the word "vision" in the church context but it is not clear in which sense they use it. Do they refer to a vision in the biblical sense of a divine revelation (meaning no. 1), or to the type of vision described in management literature (meaning no.3)? Of course, one could easily deal with this side effect by specifying the sense in which one is using the word "vision". But as a church consultant, I have noticed that pastors sometimes play around with this confusion of terms. They develop a vision as described in management theory (3), but by adding Bible verses to the vision, they create the impression that this vision is actually of divine origin (1). Then the use of the term "vision" becomes manipulation.

It is also interesting to note that in the Western world the value of a vision is sometimes justified with a quote from the Old Testament book of Proverbs: "Where there is no vision, the people perish" (Proverbs 29:18, King James Version). This reference occurs in the church context, but, also in the public sphere (Shipley, 2000, p. 227). In a society with a strong Judeo-Christian tradition, an appeal to the authority of sacred is meant to convince people of the need and the power of a vision. However, this is actually an abuse of scripture, as the proverb refers to the original meaning of vision as divine revelation, not as a future state to be envisaged. The translation of the New International Version, "When there is no revelation", would protect against this confusion.

### 4.3 Becoming "False Friends"

So actually, when the terms "servant leadership" and "vision" re-enter the Christian world, they are a bit like "false friends". The words sound familiar but they may not be identical with the biblical concept or biblical meaning.
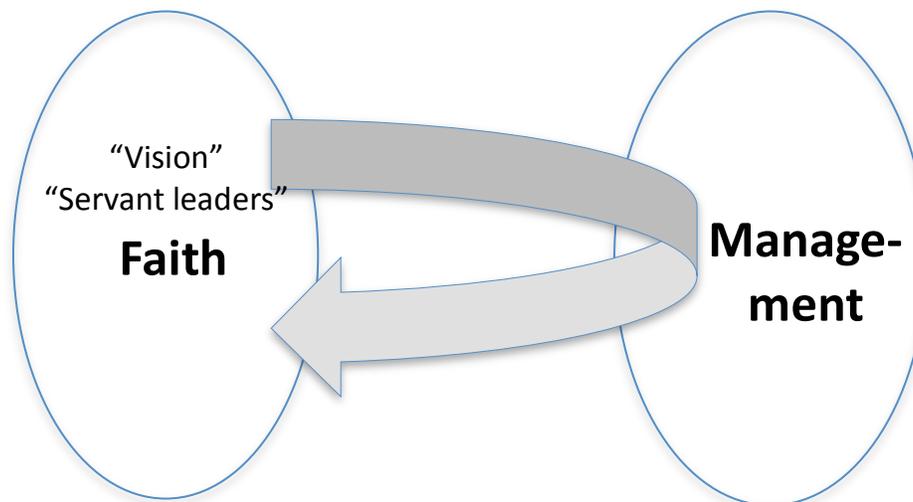
**FIGURE 2:** Re-entry of religious terms.

Of course, these are not the only religious terms re-entering the area of faith. Another famous term is "mission", which was originally understood as the Christian mission. Today it has become a standard term in management theory and FBOs, like any other organization, formulate their specific mission. However, it seems to me that this re-entry is as confusing at the terms "vision" and "servant leadership". A fourth example would be the term "hope" which has a strong root in the Jewish and Christian bible. It was then taken up in Fry's theory of spiritual leadership (Fry, 2016, p. 4), which is in turn used by some FBOs. However, so far, it has not yet become as prominent as the terms "servant leadership" and "vision".

## 5. CONCLUSIONS

This article has discussed the complex reciprocal relationship between faith and management. For historical reasons the links between Christianity and management science are especially numerous. In general, there is fruitful exchange between faith and management. The two disciplines can learn from each other, and bringing ideas from one discipline to another is often stimulating, fostering new ideas.

However, I have argued that at least three links must be viewed critically: Firstly, management methods are not neutral; they might affect an FBO in a way that it does not comply with that particular faith. Secondly, although I see some merits in faith at work, a single-faith approach should be avoided in a secular workplace, as it might lead to injustice. Thirdly, if terms from one area are transferred to another area and then re-enter the first area, these terms may have changed their meaning, thus becoming "false friends".

As a practical consequence it should be noted that manager of FBOs should critically reflect, which management methods would fit to their specific context. I also think that more research should be done on the specific challenges of managing FBOs because there two perspectives meet together, the earthly and the heavenly perspective. And this meeting-point gives a creative tension that is worth exploring.

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# Faith-based Leadership as an Art of Mastering Ambiguity

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## Abstract

This article addresses the relationship between leadership and faith-based spirituality in the context of organizational ambiguity.[1] First, it argues that organizations increasingly face competing expectations from different institutional environments and stakeholders, inevitably leading to ambiguous and even contradictory situations of decision-making that managers must somehow deal with. Their learned economic theories and applied business management tools usually aim to dissolve ambiguities and contradictions in favour of a purely economic rationality. This leads to major conflicts between different stakeholder groups in many organizations, and this puts managers under enormous pressure because they cannot please everyone at the same time by making a decision. The question arises of how managers can learn to deal with ambiguity and contradictoriness in a more suitable way for multi-rational decision-making situations, and there is the argument that a certain form of faith-based spirituality can prepare leaders to deal with ambiguity and contradiction more appropriately. Finally, the article concludes by presenting four different strategies on how managers can deal with these phenomena of multiple rationalities in practice.

**Keywords:** Faith-based Leadership, Ambiguity, Spirituality, Hybrid Organizations.

## 1. INTRODUCTION

Normally, we do not associate issues of leadership in organizations with religious beliefs or spirituality. On the contrary, one of the great achievements of modern organizational theory is that it has shown that the role a person fills in an organization must be distinguished from the person themselves. The performance of a role has little to do with the personal faith of those who hold that position, and this distinction between a person and their job allows an organization to expect tasks to be dutifully performed, even if the jobholder has different individual opinions and preferences. For example, a person can accept a job as a controller regardless of what religion they belong to, whether they accept their boss' religious opinions, or what political views they associate with. A person and the role they fulfil are two different things, and no one expects an employee to cross certain ethical red lines. According to sociological understanding, this is precisely what distinguishes an organization from a family, where a person is always expected to be completely compliant in their role within that structure. So-called faith-based organizations (FBOs), such as churches, Christian aid organizations or diaconal or social institutions, are exceptions, as job holders within them are expected to embody certain religious beliefs; nevertheless, this would not be critical for a secular organization since they do not recognise how personal beliefs affect job performance. This is the starting point for our considerations: we keep our religious beliefs out of our professional concerns in modern Western societies, separating profession and faith.

In this article, it is shown that a certain kind of religious faith and religious spirituality may be a helpful learning arena for leaders to better deal with ambiguous and contradictory decision-

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[1] I would like to thank Dr Reinhardt Schink for his inspiring ideas, valuable contributions and critical comments on an earlier version of this article.

making situations. My argument briefly boils down to seeing personal faith and related spirituality as a valuable resource that would aid in the role of leadership. Those who do not deal with religious questions merely cognitively, scientifically or intellectually, but practise faith and spirituality, inevitably encounter "The Uncontrollability of the World" (Rosa, 2020).This is deeply inherent in faith. Those who have been able to practice this repeatedly within the course of their spiritual journey are better suited for current organizational leadership challenges than those who primarily take the side of economic rationality in decision-making.

Gümüsay (2020) has shown that there is a research gap in elaborating the particular meaning of religion in the context of multiple institutional logics that organizations face. This article aims to address this existing research gap and to contribute to showing what significance Christian spirituality can have in the field of leadership.

The methodology used is based on a qualitative analysis of important sources from the field of systemic organizational and management research and is complemented by selected theological contributions. A quantitative study has not yet been carried out, but could be the next step in the research process in order to empirically validate the literature-based hypotheses used here. However, this step has yet to be taken. In this sense, the present text follows a hypothesis-generating method.

## 2.  ECONOMIC RATIONALITY AND ITS LIMITATIONS

What exactly does economic rationality mean? Against the background of industrial mass production in America, Frederick W. Taylor (Bonazzi, 2014, 25) made several proposals regarding so-called scientific management and founded the management and administrative sciences. In Germany and other countries, the first business schools were founded to train managers and educate them on good management tools. If one asks about the theoretical core of these economic approaches, two paradigms guide the action. First, business administration assumes that organizations are amenable to rational control and design; therefore, it asks how the conditions will be arranged and how the available means will be used to achieve a given goal that is predetermined from the outside. Thus, in regards to scientific theory, business administration is part of a tradition determined by causality, as it asks how the means will be used to achieve the goal.

Secondly, in the paradigm of rational organizational design, business administrators assume that it is not exclusively a matter of achieving goals but that the available production factors will be combined in order to generate the greatest possible profit. In this respect, it is in the tradition of the (neo-) classical economic theory, according to which individual utility maximisation (operational profit maximisation) at the system level leads to an increase in overall economic welfare. In short, the rationality of objectives and profit maximisation could be identified as dominant theoretical figures in business administration, which accordingly also influence its methods and instruments. From the perspective of the humanities and other social sciences, all kinds of objections can be raised concerning these theoretical assumptions of economics. In the following sections a selection of these arguments are outlined and some blind spots in classical economic thinking are pointed out.

Like any other science, business administration also has its blind spots. Such a meta-discourse will be discussed concerning aspects of the claimed normative independence or freedom from values of business administration, as well as the elements of economic rationality, causality and totality.

In practice, the incorrect idea has prevailed that business administration is like an exact science, comparable to the study of chemistry or mathematics. However, it's argued that business administration barely reflects its normative blind-spots. It makes supposedly value-free statements but does not convey what these statements do and under what assumptions and conditions they have come about. My teacher, Ekkehard Kappler, used to say, 'Numbers are made, and then

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they have power'. However, who still talks about the contextual conditions of their creation? A business administration that exhausts itself in optimising the achievement of operational goals on an instrumental-technical level without addressing how these goals come about runs the risk of only acknowledging a single part of a larger whole. Reflecting on the contextual conditions of business management seems to be an important prerequisite for its insights to achieve certain connectivity in organizations in which there is awareness that there are other forms of interpreting the world beyond economic rationality (e.g., medical, ethical, social). Such a thematisation of the business contexts leads to, for example, questions about the micro-political power relations in the organization: which stakeholders have specific information needs? Who is entitled to see their information needs being met? Where are they looking? What are suitable indicators of success are used for monitoring the achievement of goals? What exactly can be expressed in figures, and what is not amenable to quantification? How are deviations dealt with? (Kappler, 2006) Suppose that the business administration reflected that applying its methods and instruments is already understood as an intervention that that does not remain without consequences for organizational events. It would then address communication problems much more strongly and would not insist so much on delivering value-neutral facts; rather, it would see its contribution in initiating reflected communication about these facts in the organization. In short, the business theory is not value-free, and neither is practice. Therefore, managers cannot and should not escape these value questions, and the question arises as to how they can increase their sensitivity to such value questions.

Hardly any other model is as closely linked to the idea of economic rationality as the economic, behavioural model of homo economicus (cf. Kirchgässner, 1991). This concept claims to explain people's individual decision-making behaviour and is based on two assumptions:1) people behave rationally in decision-making situations (assumption of rationality), 2) people pursue their individual self-interests (i.e., they maximise their benefit) (ibid. p. 45 ff.). The model has been extensively deconstructed and critically discussed in the social sciences and humanities (cf., e.g., Haller, 2012; Kirchgässner, 1991), and so we can avoid repeating all the critical objections. The two main counter-arguments state that people demonstrably act irrationally (or altruistically) and rarely have complete information regarding their alternative actions. It is true that the economic sciences have taken up many of these arguments and, for example, have included the existence of normative rules as institutional limitations of a decision situation in the theory design (cf. Powell/DiMaggio, 1991). However, this has done little to change the fundamental assumptions of the economic, behavioural model, namely the consideration that optimal decisions could ultimately be calculated. Even if decisions are made in the context of individual preferences, and even if they can only be made under certain restrictions (including limited information), it is a decision that optimises one's own utility (i.e., the central assumption) (Nida-Rümelin, 2011, 38). It is precisely this narrow view of making rational decisions solely based on whether they increase one's own benefit, optimise personal interests and are individually advantageous that makes the model seem somewhat easy to understand, but at the same time also very oversimplified. In fact, there are also other good reasons for making a certain decision in this way and not in another ( that is, social, moral, medical, etc.). If one were to condense them all into the concept of economic rationality, it would show that one has only a very limited theory of rationality. However, this is what one could reproach business administration with to this day.

Business administration also assumes that the available means (resources, production factors) are to be used to achieve the specified goals in the best possible way (i.e., with the optimal use of resources), and that the conditions can be shaped in a goal-oriented manner. In this context, leadership in organizations has the task of controlling and ensuring that all resources are used correctly. It assumes that the reality of businesses is fundamentally subject to the causal principle to achieve this. Max Weber has already pointed to the causal differences between ends and means for the rationalisation process of modern society, which contributes to immense progress in science, technology and organizations. In his analysis of rationalisation, he was fascinated by the fact that the means and ends could be causally linked and that real conditions could be im-

proved as a result (cf. Jung, 2008, 72 ff.). Particularly in regard to the natural sciences and engineering, we are used to causal relationships having an effect and being made useful for an intentional influence on the world. Although business administration is repeatedly brought close to these supposedly exact sciences, it is questionable whether the reality of its subject area can be adequately described with an understanding that emphasises causality. In fact, companies are organised social systems for which it is true that the whole is more than the sum of the individual parts (i.e., we are dealing with phenomena of emergence). This means that due to the interaction of the individual, organizational elements, special characteristics and structures emerge that cannot be directly influenced from the outside (e.g., corporate culture). Heinz von Foerster proposed the distinction between a trivial and a non-trivial machine (cf. Foerster, 1997, 32 ff.), pointing out that social phenomena, including organised social systems, differ from simple, technical or causal machines. In contrast, so-called non-trivial machines are characterised by their internal states changing continuously on the basis of previous operations and how their outputs simultaneously represent the inputs of new operations. An input once given will no longer produce the same output, as the operation of the machine at time $t_{(n)}$ depends on the operations of its past $(t_{(n-1,2,3...)})$ (Jung, 2008, 74; cf. also Foerster, 1997, 39). In this sense, organised social systems are non-trivial machines. They are neither simple and causally constructed in the sense of Max Weber's rationality of purpose, nor do they behave so randomly in their operations that they can be described statistically (Baecker 2005, p. 14 with reference to Warren Weaver's 'Science and Complexity' from 1948). What is prudent to observe here is that business studies do not have an eye for the stubbornness, non-observability or irrationalities that exist in organizations. In fact, within organizations we are always dealing with social arrangements that cannot be described with the conceptual tools of business administration because they are completely unpredictable and indeterminate. In its focus on the description of objective entities, business administration is blind to the kind of realities that are communicatively produced in social processes and in which the given, real and objective appears and the potential, imaginary and unreal do not (cf. Rüegg-Stürm, 2001, 21).

The objections listed here amount to rejecting the absolutisation of business descriptions and instead seeing economic rationality for what it is: merely one possible form of describing the world in the diverse concert of many other rationalities. Totality means that business administration tends to foster the social process of economisation through its contributions. This consists of declaring the economic principle, according to which costs and benefits are carefully weighed against each other to be a universal approach to human decision-making (see Sandel 2012, 63 f. critically). Probably the most famous advocate of such a totality of economic thinking, according to the benefit calculus, should be applied to economic decisions and social, religious or political ones is the American Nobel Prize winner in economics, Gary S. Becker (Becker, 1982, 7). Becker's radical economic approach, in which the principle of utility is extended to practically all areas of life, has been widely disseminated (and criticised) in economic theory and many practical areas of human coexistence. Sometimes the approach has led to accelerating the process of societal economisation. With that being said, a description of social and organizational decision-making situations that narrows itself down to economic or business models always delegitimizes alternative explanatory approaches.

In my opinion, a critical examination of the blind spots of business administration concerning its conceptual foundations is an important prerequisite for giving business administration methods and instruments the appropriate status in organizations that they can undoubtedly have. This is the only way to see competing possibilities for understanding and interpreting the world alongside economic rationality, and leaders must learn to better understand these multiple concepts, as theorised in the following section.

## 3. ORGANIZATIONS AND MULTIPLE INSTITUTIONAL LOGICS

The question of how society and organizations are connected has been theorised by organizational sociology (with a view to society) and by sociology (with a view to a social theory of the

organization) (cf. Tacke/Drepper, 2018 and Lieckweg/Wehrsig, 2001). In sociological organization theory, neo-institutionalism, in particular, has dealt with this question and found out that the organization's modes of operation cannot be detached from the norms and expectations of its institutional environment. To understand organizations, one must observe the institutional world in which they are embedded. This is because the behaviour of organizations cannot be explained based on the criteria of efficiency but rather must be explained by taking into account the diffusion of institutionalised patterns of behaviour (Besio, 2015,159; see also the references thereto Meyer/Rowan, 1977; DiMaggio/Powell 1983 and Scott 2001). If, for example, an organization is embedded in an institutional environment in which the aim is to provide the religious system with services, as is the case with churches, then this also affects its internal mode of operation. This cannot then be aligned solely to criteria and procedures that cannot claim any validity in this environment. Such organizations then sometimes find it difficult to measure all internal decisions by whether they are profitable. Instead, they must, for example, be able to be theologically legitimised at the same time. The religious system is then used as a reference system. It is not surprising that this approach was criticised by the representatives of the economic behaviour model. For the neo-institutionalists, decisions are made by actors who align them with external environmental requirements, which are sometimes also politically and/or morally coded. This discussion will not be repeated here, but it should be pointed out that the coupling of organization and society (i.e., of internal operational decision-making reality and the external demands from the social environment) is of particular importance.

In organizational science, this line of thought has gained acceptance in recent years and dictates that organizational decisions must be aligned with several institutional environments at once. Against the background of growing societal pluralisation and differentiation, they have to find ways to deal with this increase in complexity. In this context, concepts regarding pluralistic organization (Denis/Langley/Rouleau, 2007, 179 f.) or the hybrid organization (Brandsen/Karré, 2011) have entered organizational research. The idea that these organizations must simultaneously process multiple rationalities in their decision-making processes is central. Therefore, Kuno Schedler also speaks of multi-rational organizations and multi-rational management (Schedler, 2012, 366) when he traces the theoretical historical development this article refers to here. According to Schedler, institutionalised expectations of an organization lead to its hybridisation so that it becomes a pluralistic organization in the long run, something that has become more and more evident in practice, making the question of managing pluralistic organizations highly relevant. (ibid.)

The point is that leadership needs to be reconceptualised within these hybrid organizations, including social welfare organizations, churches, NGOs, etc. Suppose one understands such organizations as multi-rational contexts, structurally coupled with several social environments (social aid, economy, health, religion, etc.). In that case, a specific understanding of leadership in the context of the resulting multiple decision-making rationalities is needed.

However, the argument of the hybrid organization is to be sharpened even further. Indeed, even normal commercial organizations such as companies or banks are increasingly dealing with phenomena of multi-referentiality if one takes a closer look at the various stakeholder interests from their internal environment.

As can be seen in the context of current discourses on leadership and organization, categories are increasingly being addressed beyond the narrow understanding of economic rationality. More and more commercial organizations are also being observed for their potential to serve the individual needs of their members beyond their original mission. Laloux (2014) and Scharmer (2014), for example, prominently argue that, under the conditions of hypermodernity, organizations are increasingly being confronted with expectations on the part of their members that are aimed at categories such as the creation of meaning and personal well-being. Laloux shows that employees increasingly yearn for a radically different way of working together in organizations. As a re-

sult, he counters the modern performance-oriented paradigm with a postmodern pluralistic paradigm. This new paradigm is very aware of the shadows its modern counterpart casts on people and society: the materialistic obsession, social injustice and loss of community. On the other hand, the postmodern pluralist worldview would have a high sensitivity to people's feelings, according to Laloux. In the perspective of this paradigm, an inspiring sense orientation would be at the centre of all (also organizational) action. What is special about this view is that organizations are challenged enormously by it. In addition to the economic fulfilment of their original purpose, they are also exposed to the individual sense-making expectations of their members. The human relations movement has always pushed for the reintroduction of human needs in scientific management. However, this was always linked to the argument that better working conditions would make employees more productive in the long run. Adding the employees' individual expectations of the creation of meaning becomes part of the organizational purpose if one takes Laloux at his word.

For organizational theory, it is an open question, both empirically and theoretically, whether organizations are in principle overburdened with having to fulfil individual expectations of meaning on the part of their members in addition to fulfilling their purpose. However, these individual expectations go hand in hand with an immense increase in organizational diversity, as it cannot be expected that an inspiring sense of purpose means the same thing for every member of the organization. Therefore, different and often even contradictory world views and value attitudes confront companies with very different perspectives, expectations and demands from both their external and internal environments.

Such a situation would be resolved in a worldview shaped by modernity by searching for an overarching context(Jean-François Lyotard spoke of the 'grand narrative') wherein the different points of view could be adequately addressed, the claims weighed and a 'rational' decision made. With the loss of faith in 'grand narratives', however, the optimism that such situations could be discursively managed at all also dwindled. Postmodernists, and particularly hyper modernists, not only doubt that an overarching context exists, they also do not believe that employees only have to talk to each other long enough to understand each other and reach a majority agreement. Therefore, organizations must increasingly develop the ability to deal with diversity, ambiguity and indeterminacy.

Concerning the organizational theory, it was previously considered a settled matter that the appropriate response to ambiguous decision-making situations is hierarchy, the advantages of which should not be underestimated too quickly. After all, there have always been different 'world views' when, for example, marketing and controlling, research and development or sales have looked at a problem from very diverse perspectives. It has always been the case that hierarchy was used to solve decision-making problems (e.g., regarding the use of scarce resources), and the task of leadership was to solve existing conflicts from a higher perspective. What is new is that the different contexts are splitting up more and more and that different traditions and points of view exist even within one department. The phenomenon of ambiguity is becoming radicalised and the 'translation work' is becoming more and more challenging - or even impossible - especially when external stakeholders are also involved. It is becoming clearer that no internally consistent goal hierarchy system maximises all dimensions so that the overall system is at its optimum point.

Consequently, we are faced with a dilemma: On the one hand, it must be stated that there is no longer a coherent overarching context of meaning for organizations that is capable of resolving the differences in interpretation and the resulting conflicts. On the other hand, the demands on organizations with regard to their ability to create meaning have increased enormously: organizations are supposed to orient themselves to values such as 'fairness, equality, harmony, community, cooperation and consensus'. Thus, in addition to their actual purpose, companies must increasingly fulfil demands for the social and individual creation of meaning for their members and

their external environment. This goes far beyond the classic function of fulfilling a purpose and requires a new approach to leadership that is able to think in terms of meaning without being able to meet the associated expectations fully.

All this cannot remain without consequences for leadership and leadership theory, which will be discussed further in the following section of this article. It is argued that a certain kind of religious or spiritual faith can be a training ground for increasing the ambiguity tolerance and ambivalence affinity of leaders.

## 4. FAITH, BELIEF AND AMBIGUITY

The following section will clarify that a certain form of religious faith and the spirituality associated with can support managers in developing their tolerance of ambiguity, which is necessary for the above-mentioned reasons in coping with organizational challenges. One could accuse of instrumentalizing faith and spirituality for better management, functionalising them to a certain extent. However, this is by no means the intention, as it shouldn't be assumed that becoming spiritual, dealing with Christian mysticism or going on pilgrimage to a monastery will make people become better managers. It is not about the linear causality reduction of a simple if/then scheme. Faith and spirituality are not a means to an end but a value in themselves, and they retain that value quite independently of their contribution to achieving a goal.

The influential Harvard theologian Harvey Cox (2009) proposed a distinction between Faith and Belief in this context to make it explicit that it is about a very specific way of dealing with religious or metaphysical questions. One can have a deep faith but reject certain beliefs that are important to a religious community, and the reverse is also true: one can hold the opinions and beliefs of religion with great passion or even fervour to the end but lose one's actual faith over time. Faith is a process, a kind of life journey that helps us come to terms with the ultimate questions behind the questions. Albert Einstein put it in the following way: 'To sense that behind anything that can be experienced there is something that our minds cannot grasp, whose beauty and sublimity reaches us only indirectly: this is religiousness. In this sense, and in this sense only, I am a devoutly religious man'. (Cox, 2009, 21, quoted according to Walter Isaacson) The first Christians were called 'people on the new way'. To have faith is to be on the way, which is the opposite of a creed that tries to fix matters in a static manner and where immovable foundations are to be preserved. So when this article speaks here of religious faith and a corresponding spirituality, it doesn't so in a denominational sense or in the form of a particular creed, but in the sense of faith (in accordance with how Harvey Cox describes and historically reconstructs it). This contribution refers to the Christian faith because the authors' biography is rooted in this narrative community. However, similar forms of faith can be undoubtedly found in other religious traditions. It can be suspected that for all religions, in one way or another, the distinction between faith and belief can be instructive and revealing.

In this sense, the nature of Christian spirituality can be understood as letting go of one's own attempts at power and control. The 'incarnation of God' (the Christian term) is to be interpreted in this perspective as a letting go of God, who becomes a man and comes into the world as a child in a stable and is willing to give up all comforts. He gave up control and became enormously dependent as a child. Such a letting go must be practised, as it contradicts our (at least Western European and North American) cultural tradition of 'taking things in hand', shaping them and leading them to success - in other words, managing them. Christian spirituality knows that there is something greater than one's abilities, concerns, ambitions, goals, etc. For example, many organizational developers (with great openness to spirituality) are better able than hard-nosed managers in using large group methods such as Open Space, which relinquishes control and lets the group do what happens with amazing results.

When leaders practise Christian spirituality, they inevitably have to come to terms with their limitations and powerlessness. 'Becoming flesh' means turning away from inadmissible idealisation

and perfection. 'Not idealism, but embodiment, not abstract-eternal ideas, but rather the here and now, not withdrawal from the material, but becoming flesh is the task of Christian spirituality'. (Zulehner, 2004, 33, own translation) Those who engage in such an incarnational perspective in their faith or spiritual practices become more capable of coming to terms with their power to act and their powerlessness. In other words, for leaders it is then a matter of putting the abstractness of the targets in tension with the concrete empirical conditions of action in their organization. In this sense, spirituality would be the 'realisation of faith under the concrete conditions of life'. (Zulehner, 2004, 39, own translation) Further, spiritually-experienced leaders would be challenged by this to conceptualise the concrete conditions of life as an object to be worked on and changed in favour of growth, optimisation or goal achievement. They are realities that we sometimes have to endure and accept in regards to powerlessness.

My thesis is that leaders who practise Christian spirituality become more capable of enduring ambiguous, vague and contradictory situations, as well as acting more appropriately throughout such scenarios. Those prepared to deal with their powerlessness are less likely to succumb to the temptation of managerial hubris. Those who understand their powerlessness will also be able to deal more calmly with the limits of others. Those who practise letting go are not condemned to hold on to everything, to grasp and hoard. Even one's own opinion does not have to be pushed through at all costs against all objections. In short, Christian spirituality can help managers in the context of established organizational logic toward action and expand their repertoire of world interpretations, thus increasing their ability to recognise that the world is much more colourful, complex, ambiguous and unavailable than is generally assumed in management.

In his essay on the unification of the world, the Islamic scholar Thomas Bauer points out that religion (not only Christian religion and spirituality) is very well suited to increasing ambiguity capacity, if one discounts its fundamentalist distortions. The first reason is, as Bauer observes, based on the need to accept transcendence as such. Religion is based on the belief in something that goes beyond, literally transcends, what is rationally knowable; the belief in something greater and different from us. Because this is so, it cannot be completely interpreted; therefore, no matter how hard the most intelligent theologians and religious scholars try to conceptualise the transcendent, there always remains a residue of vagueness and indeterminacy(in other words, ambiguity). (Bauer, 2018: 34) Transcendence cannot be fully interpreted, as it would not be transcendent if it did not exceed the measure of human reason.

In a simplistic view of the great book-religions such as Judaism, Christianity and Islam, the apparent counterargument used is that the sacred texts provide information on how certain concepts and religious ideas are to be grasped (Belief). However, this overlooks the fact that the understanding of the sacred texts is based on a human, situational context. An infinite and eternal God reveals Himself/Herself in a finite and temporally bound world, and this revelation is recognised (or misrecognised) and interpreted through human contexts. Ambiguity is thus a constitutive feature of a Christian spirituality that remains so dependent on a hermeneutic and has several sources (including the object of cognition and the contextuality of human cognition). 'All of these texts show precisely that characteristic inherent in all complex texts: ambiguity. Since most of them are rather complex texts, which also speak about a particularly ambiguous field such as religion and faith, they even show a particularly high degree of ambiguity, comparable at best with literary texts. In the case of these texts, too, the way they are dealt with will therefore depend very much on how tolerant of ambiguity the readers and listeners of these texts are'. (Bauer, 2018: 35, own translation) Therefore, there is a particularly large degree of indeterminacy involved in dealing with religion, and spiritual people are no strangers to this. However, they do not find ambiguity frightening, as it is essential to such spirituality. Transcendence opens up for them a serenity in penultimate earthly things, as well as a calm reflection on their limitations. This perspective changes both their actions in everyday leadership and their view of the empirical conditions of action in this world, their lives and their relationships with fellow human beings.

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## 5. FAITH-BASED LEADERSHIP IN THE CONTEXT OF AMBIGUITY

Let us conclude: one might think that almost everything has been said about leadership in science; however, it is noticeable that a large part of the leadership approaches being offered belong to how-to literature and are strongly normative. Many concepts are more like a recipe and try to describe more or less plausibly what one should do so that it tastes like leadership. Most approaches elaborate on how one should lead but not what constitutes leadership's social phenomenon (cf. Muster et al., 2020, 285). Mostly, the texts suggest that leaders can autonomously decide how they want to lead and thus, to a certain extent, directly control or strongly influence the conditions for success and the results of good leadership. The common and often normatively driven leadership styles such as democratic leadership (Gastil, 1994), ethical leadership (Brown & Treviño, 2006), servant leadership (Greenleaf, 1998), transformational leadership (Bass, 1999), transactional leadership (Sarros & Santora, 2001), lateral leadership (Kühl, 2017), etc. are good examples of this claim that leaders are always able to freely choose their own type of leadership independently of those they lead. But that is an inadequate simplification. Much more appropriate, therefore, is the approach of situational leadership (Hersey, Blanchard & Natemeyer, 1979), whereby it must be emphasised that the situation itself pre-structures which leadership impulses are necessary, but also possible.

One is again reminded of Heinz von Foerster's metaphor of the trivial machine (Foerster, 1997, 32 ff.) when it is assumed that managers can vary their leadership style according to the situation and thus come a little closer to the goals of the organization. Regarding management, the famous researcher Henry Mintzberg (2010, 65) stated that extensive lists of characteristics are usually compiled. In order to be successful managers are expected to just apply these lists. He pointed out, that this trivialises the real problem. The problem with this idea is that people would have to become true superheroes. Additionally, another problem is that one learns little about the social phenomenon of leadership because it is broken down into its fundamental parts in the lists, leading people to only focus on certain aspects in particular.

This paper follows a sociological concept of leadership and, following Dirk Baecker (cf. Baecker, 2012), conceptualise leadership primarily as a social communication event in which the actors involved mutually relate to each other and thus jointly produce how leadership is or is not done (cf. Baecker, 2012). Against this background, it is essential to distinguish the concept of leadership from that of hierarchy and the formal expectations that an organization addresses to some of its members. Indeed, not all who should lead (leaders, for example) actually lead, and not all who lead are formally expected to do so (because they do not hold the hierarchical position). The hierarchical assignment of a leadership role does not automatically mean that leadership takes place. Here, the approach of Judith Muster, Stefanie Büchner, Thomas Hoebel and Tabea Koepp is followed (Muster et al. 2020, p. 285), who stated: 'Leadership is conceived as situationally successful intervention in critical moments, which is realised in a sequence of three events. The trigger event is a social situation in which a critical moment arises that makes leadership necessary in the first place (I). This is followed by a communicatively raised leadership claim that mobilises the means of influence (II). The emergence of followership (III) shows whether leadership has taken place'. (Muster et al., 2020, 285, own translation) Within these sequences (cf. Aljets/Hoebel, 2017), it depends first of all on whether and by whom a critical moment is observed. It can happen that a leader (because he or she is socialised in business administration, for example) does not observe specific challenges and therefore does not produce any leadership impulses, which sometimes leads to a disappointment of expectations on the part of the other actors. While some perceive a critical moment that leads to uncertainty, others lull themselves into security and doubt whether leadership is needed at all in a given situation. My argument is that leadership is a continuous process in which it must be negotiated and reflected again and again, in a very context-specific way, what is observed by whom, which organizational uncertainty zones arise and what expectations the actors involved have of each other. What is assessed as good and appropriate leadership is in the eye of the participants. Someone can make a communicative claim to leadership but then let others go nowhere and offer no allegiance. Conversely, the small-

est interventions (by whomever) can sometimes be enough to defuse a critical moment and thus resolve uncertainty. Followership then consists merely of adopting a particular interpretation of a situation offered by another. What is at stake here is to show that 'leadership is conditional: it depends on critical moments; on the fact that a claim to leadership is made and allegiance arises. One event of the sequential three-step of leadership is not enough to call an active leadership. A leadership claim without followership and a critical moment is initially just that: a claim, not leadership. In addition, the concept developed here points out that there is no continual guarantee of leadership: in other situations, others may successfully lead. Hierarchy also does not guarantee leadership in this sense. Just as with the formation of informal leadership roles, it merely endows leadership claims with a higher probability of acceptance' (Muster et al., 2020, 298, own translation).

Most business management concepts have difficulty with the concept of leadership presented here because it becomes clear that leadership can also fail (Baecker, 2003). Still, it remains unclear who can be blamed for this failure. It is precisely at the two levels of observing critical moments and mobilising means of influence to assert a claim to leadership that all kinds of contradictions and conflicts regularly arise in hybrid organizations. The different functional logics of the institutional environments and the diverse stakeholder interests leads to the actors involved making very different observations about what can be understood as a critical moment. The business administration methods and instruments measure the world differently than the methods of other reference systems (e.g., social work, theology, medicine). Depending on the instrumental lens through which the world is viewed, one sees different challenges and classifies moments as critical in different ways. This then regularly results in contradictory interpretations of the phenomena occurring in practice, leading to considerable organizational conflicts.

The fact that conflicts can arise because different actors observe the world differently is not new. However, for the question dealt with here, it becomes apparent that leadership has a special (and perhaps also new) task, namely to handle paradoxical and contradictory organizational conditions without immediately taking a particular side or resolving conflicts using hierarchy. Multi-rationality and the resulting contradictions are in principle irresolvable; therefore, conflicts that arise cannot be solved once and for all but must be continuously 'handled'.

Accordingly, leadership can be compared to a juggler who has to keep different perspectives and goals 'in the air' simultaneously. Comparable to a tightrope walker who oscillates back and forth between one side and the other, leadership must not permanently take the side of only one rationality. Otherwise, hybrid organizations run the risk of not paying enough attention to the central expectations of their institutional environments and thus endangering their existence in the long run. Leadership understood in this way therefore no longer has the task of bringing about unambiguous decision-making situations (for example, through the sole interpretative authority of the economists, the lawyers, the theologians or any other experts).It must instead take into account that this unambiguity cannot exist in principle. One has handle several institutional environments at the same time and this is one of the conditions for survival. It is a matter of interpreting the contradictory conditions that arise from this as the normal organizational case. In other words, leadership in organizations requires a high degree of ambivalence and tolerance of ambiguity. (cf. Bauer 2018) This means that leaders must have the competence to tolerate uncertain, ambiguous and contradictory ways of acting and create conditions that provide the actors involved with forms of negotiation to come to a decision in a reasonably productive way without attaching themselves one-sidedly to only one rationality.

Within organizational development (and thus also in the context of a central part of business management methodology), the discourses on holocracy and agile organization can be understood as an attempt to appreciate the existing diversity of perspectives, organizational ambiguity and vagueness, not as a means to dissolve them using hierarchy. (Jung/Schink, 2019, 178) It is by no means easy for leaders - no matter how professionally they are socialised - to become

capable of ambivalence and tolerant of ambiguity. The need to mediate between different rationalities requires a high degree of perceptual competence, communication skills and the ability to engage in dialogue in order to be able to register the critical moments in an organization at all in order to assert one's claim to leadership in a way that can be connected and then organise followership in this way. Those who rely on business methods and instruments run the risk of not asserting their leadership claims with those who have a different decision-making rationale due to a different institutional environment. Conversely, those who never rely on business management instruments do not have the necessary 'sensory perception' to receive the signals from the institutional environment of the economy, which are equally indispensable for organizational survival.

Leaders who have learned in the course of their religious socialisation that truth is always in need of interpretation in a hermeneutic process often find this capacity for ambivalence easier. Those who have dealt with questions of mysticism or hermeneutics on their spiritual journey are more likely to remain open to the fact that decision alternatives cannot always be calculated rationally or economically, finding that they stand side by side on an equal footing. Heinz von Foerster has pointed out that it is precisely in these undecidable aspects where one can only speak of a decision in the true sense of the word. (Foerster, 1993, 73)

Following Kuno Schedler, this article concludes by pointing out (cf. Schedler, 2012, 369 f.) that leaders have four possible strategies for dealing with different rationalities. They choose from these four strategies depending on whether they find a more unconscious or a conscious approach to multi-rationality and whether the leaders adhere to mono-rationality or not. In this way, four strategies for dealing emerge: avoidance, isolation, tolerance and competence, as the following cross-tabulation shows:

| | monorational/<br>centristic | multirational/<br>relativistic |
|---|---|---|
| **conscious<br>perception** | **Isolation**<br>Search for<br>monorational context | **Competence**<br>Empowerment for<br>multirational action |
| **unconscious<br>perception** | **Avoidance**<br>Implicit dominance<br>of one rationality | **Tolerance**<br>Intuitive mediation<br>between rationalities |

**TABLE 1:** Practices in dealing with multiple rationalities (Schedler, 2012, 370, own translation).

The *avoidance strategy* of leadership arises because leaders are not aware of the phenomenon of multi-rationality and they cling to dominant decision-making rationality (belief). For people socialised in business management, people from less rationalistic thought traditions (such as social workers or theologians) often seem too enthusiastic and too socially romantic in their proposals. Conversely, people without business socialisation accuse 'those up there' of not being interested in people's real problems, instead only accepting the 'cold world of numbers'. Conflicts and organizational decision blockades are pre-programmed, which usually leads to a very unproductive 'ping-pong game' between the different interests and world views.

The *isolation strategy* of leadership arises when leaders may understand multi-rationality and are aware that others have an alternate worldview because they look at the world differently. However, they also cling to their dominant decision-making rationality because the permanent con-

frontation with other institutional environments is too exhausting for them. The dance on the tight-rope seems like a Sisyphean task, and they often choose contexts in which the different rationalities can be isolated. Problems are sometimes broken down into subtasks: for example, business management tools are used to examine financial viability, while social workers examine pedagogical necessity. Of course, this does not resolve the contradiction, but the decision is postponed or the problem is delegated upwards in the hierarchy. Ultimately, leadership is avoided when, in a hybrid organization, an attempt is made to evade multi-rationality by retreating to a specialised area. In organizations, the formation of departments can be interpreted as an attempt to manage different rationalities. So-called dual heads in social institutions, where there is a commercial and a pedagogical or theological director, would also be an organizational response that first tries to deal with multi-rationality by isolating areas of responsibility – at the latest in the board, there must then be a mediation of these different world views. At that point, leadership becomes an art of dealing with ambiguity.

The *tolerance strategy* of leadership arises because leaders intuitively know how to mediate between the different positions without being aware of the underlying causes of multi-rationality. These are people who have a good knowledge of human nature and who, because of their empathic perceptiveness, can see the world through the eyes of others. When they claim leadership, they build trust and mobilise arguments and perspectives that make it easy for others to follow.

Ideally, leaders apply a competence strategy. This emerges when leaders reflect on the phenomenon of multi-rationality and consciously avoid clinging to their dominant rationalities, instead becoming willing and able to learn to oscillate skilfully between different world views. Leaders then live with contradictions and are sensitive to the resulting conflicts; see through the danger of evasive movements (especially avoidance and isolation) and can integrate the different world views productively by using tensions as a resource to energise change processes. 'Not the merging of the different rationalities or the adoption of one rationality by the others, but the retention of difference with the simultaneous will of a search for consensus is the strategy to be chosen' (Schedler, 2012, 372). The St. Gallen management researcher Johannes Rüegg-Stürm explicitly refers to the willingness of competent managers to experiment in dealing with multi-rationality. 'Multi-rational understanding begins with the admission of the existence of different rationalities of equal value and is based on a mutually positive recognition of this difference. Multi-rational management requires the willingness to actively get to know and explore different rationalities in a dialogue process without the participants having to make the respective other rationalities their own. Multi-rational management requires the willingness to act experimentally and carry out 'pilot projects' whose concrete realisation opens up new perspectives. (Rüegg-Stürm, 2011, 13, quoted in Schedler 2012, 372, own translation)

We shall conclude by turning back to our starting point: organizations are being increasingly confronted with a multitude of competing demands resulting from different institutional environments as well as from the different interests of their internal stakeholders. This phenomenon of multi-rationality or multi-referentiality leads to all kinds of ambiguous and contradictory decision-making situations that cannot be resolved by dominantly favouring linear-causal methods of economics. Rather, managers need the dialogical ability to mediate between different worldviews and interpretations, moderating between different perspectives. It could be shown that corresponding resources and competencies for such moderation can be found in the field of religious faith and spirituality; however, a prerequisite for this is not to misunderstand faith as a rigid system of categories (belief) but as a hermeneutic process of truth-seeking to discover life-serving principles behind the facts.

In this sense, faith-based leadership would be well placed to deal with the organizational phenomena of ambiguity and contradiction, as well as the conflicts resulting from competing forms, in order to interpret our world.

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# Franciscan Spirituality and the Challenges of the Modern Management World

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## Abstract

What can we learn from Franciscan tradition with regard to the management and leadership world today? The focus of this paper lies on the 800-year history of the Franciscan family as a learning organization to explore the question of transformation as a key concept of Franciscan life and Franciscan leadership. To do so, we look at the founder of the Order, Francis of Assisi (1181–1226), first. Francis himself stands for a personal, continuous process of transformation in which he chooses the Gospel as a basic orientation for his life or as the foundation of his self-leadership. He completely changed his life goals and defined the identity of the entire Franciscan organization. In this context, the core values of the Franciscans, such as evangelical poverty, serving character and the aspect of brotherhood (which includes all sexes) will be discussed. The Franciscan approach serves as a perfect field of practice for bringing together attitude and action, which is also the basis of leadership theories from the light side of leadership. Finally, practical experiences from the Franciscan tradition, like the development of structural elements (e.g., the annual chapters) are related to the management context. By focusing on practice and transformation, the Franciscan example can inspire modern organizations and leadership practice in times of current challenges.

**Keywords:** Franciscan Spirituality, VUCA World, Transformation, Leadership.

## 1. INTRODUCTION

There have always been changes in society and organizations. However, today the processes for change take place at an unprecedented speed (Dienberg et al., 2018, 797). Often people in various organizations have to cope with **v**olatility, **u**ncertainty, **c**omplexity and **a**mbiguity in the so-called VUCA World (Thompson et al., 2014, 66). In addition, for the past two years, there has been the COVID-19 pandemic, which has had a massive impact on management and all processes of life. These diverse changes create new burdens that have an impact on the performance and well-being of people in the working and private world. Traditional professional skills and organizational strategies are no longer sufficient to meet these challenges. A particular challenge is presented to the leaders. In the wake of these external developments, organizations are required to adapt to constant change. Along with organizational strategies that must be set considering today's global competition, concentration on human resources is also becoming a crucial aspect, meaning that a person with their own individual attitude, experiences, abilities and talents is becoming more important. Especially in the context of leadership on personal, team and organizational levels.

It is against this background that a question arises: what drives leaders to inspire, orientate and motivate their employees and, first of all, themselves? We need leaders who transform organizations and society at large; who are authentic and moral examples; who know how to discern given the interest of the people they serve; who have transformed themselves by the cultural and power-related forces of history. Transformative, authentic or servant leadership is highly valued, but there is a lack of knowledge as to how to develop or educate leaders in this way. The question of theory development centres around the concept of spirituality. Different disciplines, such as management sciences, psychology, education and business ethics, study the concept of spirituality concerning leadership and organizations (Hermans, 2020, 1). Although the current body

of spiritual leadership research has provided greater familiarity with the spiritual side of leadership, there are still gaps in the understanding of spiritual leadership (Krishnakumar et al., 2015, 18).

One area of research that connects spirituality with management and leadership addresses the following question: what impulses can the great orders such as Benedictines or Franciscans provide for a connection between spirituality and leadership? To get a first impression, this paper focuses on the Franciscan perspective.

The Franciscan leadership philosophy is described as serving, democratic and fraternal (Dienberg, 2016, 21ff). The two principles of spiritual poverty—first, meeting each other at eye level and, second, the ideal of communion—are crucial for Franciscan leadership and organizational culture. Furthermore, the basis of St. Francis' attitude is to follow and serve the Lord and to ask him "what do you want me to do?". Although it is quite difficult to transfer these issues into daily business, it is important to raise the question of what could be an idea for the management world today. It is definitely about the attitude of looking at the human being as a whole and enhancing its hidden potential. In other words, it is a kind of self-leadership competence. This is also to be connected to academic research. Connecting theology and philosophy with management and leadership research can be an innovative approach here.

## 1.1 Research Method

This present paper is based primarily on my long-term research activities at various universities and institutes in the field of spirituality and management. The focus lies on the conditions of a holistic ability to act which is based on a reflected framework of values. The ultimate question is how spirituality with a reflected value foundation can be transferred into personal action in an organizational context. This basic orientation was transferred into two questionnaires before being practically validated in the paper 'Religious Practices Questionnaire as a Measure of Christian Religious Practices in a General Population' and then in 'Religious Persons' (Büssing, Recchia, et al., 2017), as well as in another paper detailing Franciscan-inspired spirituality to which this article is oriented and briefly presents (Büssing, Warode, et al., 2017). This approach focused on a cross-sectional study among 418 participants to validate an instrument measuring a specific aspect of Franciscan-inspired spirituality (FraSpir). Exploratory factor analysis of this FraSpir questionnaire with 26 items pointed to four main factors: "Live from Faith/Search for God"; "Peaceful attitude/Respectful Treatment"; "Commitment to Disadvantaged and Creation"; and "Attitude of Poverty"). The 26-item instrument was found to be a reliable and valid instrument for use in training and education programmes. The centre of this work is the Gospel and the development of specific attitudes and virtues as a process of inner transformation, which is very important for the "spirit" of this paper: it is not about presenting a technical approach to deal with bad behaviour and characteristics in daily business; it is about a reflected attitude in the sense of a source of thinking and acting that needs to be trained continuously. The FraSpir questionnaire sought to operationalise and make measurable relevant values and behaviours related to Franciscan spirituality in a general population. Particularly, the core dimensions ("Living from the Gospel" and "Searching for the Spirit of the Lord") and the transformative outcomes, specifically an "Attitude of poverty", "Awe and respect for the Creation" and "Considerate acting in the world" were in the forefront of interest. As described above, the 26-item FraSpir questionnaire was found to be a reliable and valid instrument, which might be useful in training and education programmes and also in academic research that refer to value-based attitudes and behaviours derived from specific Christian contexts (Büssing, Warode, et al, 2017, 10-12).

The central question for this approach is to search for ways to transfer the reflected attitude into practice. The basic idea is to connect theology and philosophy with management and leadership research, which is done normatively and with the help of a descriptive model for a holistic value-oriented ability to act. This approach has selected three areas that combine to create this holistic, value-oriented ability to act.

Regarding the social, value-oriented ability to act two aspects are in the foreground. On the one hand, the reflection of one's value-oriented attitude as a precondition for independent action and, on the other, the ability to participate in the development of the organizational community in a self-responsible manner in multi-personal structures (Kailer et al.,1999). This is especially important for executives since the primary aim is to shape relationships, empathise with other people, perceive the needs of the other person and consider them in their actions. The second aspect is the willingness to act. This is the motivation to work for something with a full and inner reflected conviction which is based on a reflected foundation of values. The third aspect touches on the systemic (internal and external) influencing factors that affect the individual's capacity to act. This aspect includes, for example, the ability to take on the formal responsibility of certain processes (Kriegesmann et al., 2007, 183ff).In addition, trends such as New Work, common purpose or agile business strategies have to be included.

In the context of the whole project "spirituality and management", a specification was made in this process on the Franciscan tradition of leadership, which subsequently serves as an anchor for the development of the two research aspects that are discussed in this paper. It should be pointed out that, initially, it is only a matter of identifying common themes that make further scientific discussion meaningful, which is an attempt to mirror the tradition of the Franciscan movement in a structured way with some challenges of today's management and leadership topics.

Against this background, two main aspects arise that will be considered in this paper:

- Personal attitude as the basis of the ability to act;
- The aspect of transformation as a principle for sustainable individual and organizational ability.

It should be added that the selected aspects have been used successfully in various leadership workshops and seminars with different target groups for years. The aim was to make participants aware of their attitudes, and to reflect on their attitude and their faith in the context of their organization (system) to identify new perspectives and approaches for the daily business. Franciscan spirituality, especially the person of St. Francis, provides many incentives for attitudes toward social relationships and change. This addresses two aspects that also apply to the management world.

Thus, the FraSpir questionnaire described above seems to be positively confirmed via qualitative surveys and various experiences, especially in the context of training and education programmes.

### 1.2 Structure of the Paper
In a further step, the foundations of the Franciscan tradition are described with an emphasis on the attitude of the person of St. Francis and his role in the community. To facilitate the transfer of Franciscan content into the management world, a few tendencies and approaches from the management world are then briefly outlined. Finally, the connection between Franciscan tradition and the management world will be briefly discussed. The paper tries to initiate a dialogue between the two areas. Thus, a discussion is started after the introducing points have been disclosed ensuring a positive input of Franciscan tradition for today's management world and an introduction to the meaning of spirituality.

## 2. THE BASICS OF SPIRITUALITY
Spirituality has multiple definitions (Miller et al., 2018, 1).[1] Within the context of leadership and management, it is very necessary to define a theoretical foundation of spirituality from which a subsequent theory may be built. The spirituality that underlies the world´s spiritual and religious traditions, which at their core are based on loving and serving others (Fry, 2016, 2; Fry et al., 2009),

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[1] Fundamentally, this article refers to the theology of spirituality. In some research directions spirituality is assigned to the field of practical theology (Möllenbeck, Schulte, 2016).

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can provide this foundation. Spirituality refers to the quest for self-transcendence and the feeling of interconnectedness with all things in the universe. The spiritual permeates all actions, including what we think and speak, the way we physically present ourselves, how we enter a relationship and the way we deal with our different resources (Fry, 2016, 2). Further spirituality can be described as an ongoing process—a path—that could be also a basis for individual and organizational transformation (Benefiel, 2005, 732ff). In summary, spirituality is a basic inspiration for life and provides orientation for all areas of life. Although spirituality is most often viewed as inherently personal, it can also reside or manifest in teams or organizations.

## 2.1 Franciscan Spirituality

What can be drawn from the Franciscan tradition and Saint Francis of Assisi for the design of management and leadership processes? If an organization has existed for 800 years and is still growing today, at least globally, what distinguishes the Franciscan idea? For this purpose, some essential basics are selected and presented below. So, what can we learn from the person of Francis, from his attitude and his experiences to lead a life of deep conversion and transformation? Moreover, where can we find some aspects which describe St. Francis' competence to act in the context of leadership? The idea of the Franciscan leadership concept is anchored in the inner attitude of St. Francis himself, which he consistently has put into practice. It is the cornerstone of his community to the present day (Warode et al., 2014, 13-14). St. Francis himself represents a radical change in his way of life. Once the son of a wealthy textile entrepreneur born in Assisi and educated in "business life" (Manselli, 1984), he embarks on a personal life crisis in search of his identity. He finds his vocation in an evangelical life and establishes his identity in the discipleship of Christ (Warode et al., 2015, 222-223). He leads a life of poverty and preaching the Gospel. This new identity shaped by the Gospel is a holistic one that preoccupies the person with all their thoughts and actions, creating a balanced lifestyle (so we talk about material and immaterial poverty). As a result, not everything is emphatically praised or drastically rejected. Consequentially, a balance between stability and flexibility is established. A stable character, therefore, can withstand tensions; it allows for a break from one's past and is open to new ideas.

On this background, St. Francis establishes his goals in life: the search for one's own identity and the continuous reflection of one's path that includes the responsibility for all of creation (Rotzetter, 2016). Thus, with the reflected attitude and ongoing process of inner transformation, the two objectives formulated above are defined as elementary components of the Franciscan philosophy of life. It focuses on the willingness to direct oneself according to the role model, which in the case of St. Francis was, of course, Christ himself.

St. Francis is, thus, living a peaceful attitude in which he meets every human being at eye level. He puts his benefit below the benefit of his community. This defines evangelical poverty that exemplifies Franciscan spirituality. Evangelical poverty is the essential criterion of the Franciscan movement (Lehmann, 2012; Schmies, 2012). Poverty means not being tied to things and places, but it is about everything that hinders our ability to communicate with each other, about being connected to the (needy) other, which also includes a recognition of boundaries. St. Francis himself withdrew from the leadership of the Order during his lifetime (Kuster, 2002). Thus, his focus always is on people with their needs, worries and habits that need to be considered. This also results in the Franciscan Order's goal of supporting the weak and the sick, while not regarding material possessions as a centre of one's life.

Serving human beings or creation is characteristic of Franciscan leadership philosophy. Francis sees himself as a servant in his community. "I did not come to be served, but to serve," says the Lord, which is the central message of Jesus and also Franciscan leadership culture (Mk 10:45). In the Franciscan world, the managers/leaders are also called ministers (Latin: servant). In addition, the leader of a monastery is titled a guardian, as opposed to an abbot.

Another aspect of the Franciscan tradition is its democratic and fraternal character, which is oriented toward the involvement of all members and practically lives the claim of fraternal

communion. All processes decided upon in the Order are discussed democratically. Even if in the last instance the Provincial leadership makes the formal decision, the process is based on the democratic vote of all brothers; this applies in particular to the election of the Order's leading body. For instance, a single brother is democratically elected to a function by the entire Order. The statutes of the Order stipulate that the particular executive is initially elected for three years. If the community is satisfied with the "leadership performance", the Provincial minister—leader of a province—can be confirmed and re-appointed by the top of the Order for another three years. After a maximum of six years, the Provincial is assigned a new task in the Order. The intention of these regulations points to preventing rigid and unreflective leadership structures. The idea behind a temporary management position is that after a certain period, leaders should have the opportunity to reflect on their leadership term within the framework of a time-out. Through this process, one can gain distance and objectively reflect on processes and decisions to provide impulses for the development of the community and oneself, just as the "Learning Organization" of Franciscan Orders describes itself (Warode, 2016, 356ff). This does not touch a brother's progress alone, but also a functioning developing community. Finally, the distinction between person and role must be emphasised in this context. Every person is valuable with their history, skills and talents. Franciscan leadership is universal. Every person has their place in the Franciscan community, as it is about looking at the individual with their character and their abilities as they are and not as they should be. On this basis, roles and functions must be assigned to make the organization work, yet everyone is worth the same. The distinction between a person and a role is a leadership task, which is an essential task today in our highly individualised society.

As a structural element and universal and timeless orientation, the Rule of the Order of St. Francis of 1223 is elementary as a framework for the life and understanding of community leadership. The Franciscan Rule with its 12 chapters is the foundation of the spiritual life of the community. It is not a set of rigid rules. In contrast to the Benedictine Rule, which describes in great detail and hierarchically the role of the abbot and the provisor (*cellerarius*, economic leader), the Franciscan Rule has a much wider horizon. The rule should guide the brothers in specific situations, at different times and within the respective social context to adapt the content to their own responsibility. i.e., the rule should create an awareness that life is always ahead of all previous experiences and theories. The spiritual foundation (by observing the Gospel and trusting in God) of the Rule provides orientation and security to move and decide in unknown situations (Warode, 2016, 359). This makes it a resource that can iron out burdens from management relationships and change processes, for example, in an entrepreneurial environment.

Finally, structural processes for reflection and exchange of experience in the Order are dealt with here. In the early years of the Order, the annual Pentecost chapter instituted a meeting to which all brothers were invited to talk about their experiences and exchange views. On the one hand, this has the advantage of reflecting on the common profile in the community and on the other hand of adapting the work of the Order to developments in the world. In addition to this organizational method of a "medieval audit", the hermitage also offered the opportunity for self-reflection. The brothers gathered in retreat to reflect on themselves, their sins, their mission, faith and doubts and also on their relationship with God. The hermitage (which could be a single place outside the friary) is organised in a way that there is still a brother who listens and one who takes care of the physical well-being of all. In the meantime, the Order´s structure ensures that the tasks of the brothers are taken over by the community (Rule for Hermitages).

In summary, the Franciscan tradition of leadership is oriented toward the formation of relationships and continuous development. It is important to serve the community based on one's own identity. It is important to see oneself as part of a community and to contribute the whole person and abilities to it. This is based on a clear vision of community: Franciscans live according to the Gospel and work for the poor and the sick. This stands for a living connection of a reflected attitude and actions that are necessary for everyday life (Warode et al.,2018, 4).

## 3. ASPECTS OF MANAGEMENT AND LEADERSHIP THINKING TODAY

The working world of the 21st century is undergoing a massive upheaval, not simply because of the pandemic. Technological innovations are revolutionising the way organizations operate and how we work in them, including in terms of human relationships. The pressure of transformation brought about by digitisation is one of the greatest challenges of our time. In addition, however, value-related change dynamics can also be observed, which include work-related values and attitudes (Weibler, 2021, 1). This starts with people seeing more meaning in their work again (Jenewein, 2020, 2). Against this background, management topics such as Purpose or New Work are to be classified, which will be discussed below.

Likewise, the increasing complexity in the organizational world raises new questions about leadership. What does leadership quality mean if experiences and competencies from the past do not prepare for the challenges of the future, or even constitute an obstacle to dealing with the tasks of the present and the future? This means that a new realised ability to act is required. Starting from the linguistic origin of the word "leadership"—"leith"—the original meaning "moving forward or crossing a threshold" defines a basic understanding that lends itself to an expanded ability to act (Scharmer et al.,2020, 29). The scientific framework is provided by leadership theories such as transformational leadership (Bass, Riggio, 2006), which always focuses on the connection between the person and action.

In principle, it should be noted that current concepts and trends in the management world are increasingly focusing on the interests and needs of employees and other stakeholders as a basis for organizational action. These include approaches to talent or customer management (Evertz et al., 2017, 28). However, these approaches require new skills to integrate other people's needs into leadership and organizational processes. As described at the beginning of this paper, the competence to act is not just based on hard skills to reach certain business goals. Personal characteristics, the reflected attitude or social competencies become more and more important as a part of employability. As part of the management trends, we read a lot about agile organizations or the phenomenon of the "New Work movement". One problem is that the deep meaning of all these concepts does not appear in current discussions and publications. When we look seriously at the New Work concept for example, which was developed by F. Bergmann in the 1970s, we can lead a valuable dialogue with the challenges in the management world today. The New Work concept originated in the 1970s during the automotive crisis in the USA. Digitisation in car production has released work capacity. The idea of the New Work was to allow employees to find their vocation during the vacant working hours (Bergmann, 2018). This requires new forms of training and leadership and the awareness to offer a lot of time and space for experiments. Moreover, it is about getting involved in an ongoing process, a process that asks you to question yourself again and again. It is the question of a personal development process. No concept can be transferred to an organization in form of clear and useable instructions. In each organization, a way must be found individually to implement the basic idea of New Work. That requires leadership (Furkel, 2018). It is not possible to completely renounce leadership. Many employees want to know what they have to do and do not want to be completely free-floating (Bischoff, 2018). However, it takes a new form of leadership driven by a holistic perception.

One approach that focuses on holistic attention and cooperative relationships, in particular, is Otto Scharmer's "Theory U" (which can only be briefly touched on here) (Scharmer, 2015). The concept of Theory U with the so-called 'presencing' describes a learning process aimed at discovering and implementing future solutions in the context of organizational tasks and processes. Thus, the approach reacts or rather acts exactly to the conditions of VUCA World with its dynamic and disruptive changes as briefly outlined in the introduction. The learning process in the context of Theory U starts with the inner perception of a manager/an employee and places intuitive thinking in the foreground. Routine and (successfully) tried and tested patterns of thought and judgement must be withheld. Scharmer speaks of the cultivation of attention. This means that something new is not immediately put into familiar thinking pigeonholes and processed structurally. It is primarily a matter of listening empathetically to take in new things with holistic attention and to open up the

knowledge in a deeper process calmly and at a distance. They are looking for a deeper source of creativity. The question of self-reflection and its relation to function in an organization plays a central role. Both in terms of the method and the attitude of the method. Within the framework of self-reflection, it is primarily a matter of referring back to one's person, which is very close to the Franciscan idea:

> Who am I?
>
> Whom do I want to be?
>
> What do I stand for?
>
> What's that got to do with me? (Scharmer, 2016, 26-32)

Based on this fundamental orientation, connections can also be made to St. Francis' path or to the management pioneer Peter F. Drucker who says that there's only one person you can lead, yourself (Drucker, 2006, 245). Development processes start with your person in the attitude to perceive them and to shape them from a deeper perspective. As with Francis, new knowledge must also be put into practice and tried out. The experience involves being active. The connection between attitude and action is emphasised once again here. In Scharmer's approach, cooperation within an organization is of immense importance. The solution to challenges is seen above all in forms of cooperation. The task of leadership is therefore to bring people together to initiate development processes. The concept of co-creativity should also be mentioned in this context. It is important to create a living culture in organizations in which people work together and learn from each other across their different functions. The goal must be to design these processes in a future-oriented manner and to anchor them in organizational structures. This is to support an awareness that continuous development must be an integral part of securing the future. Ultimately, Scharmer's concept includes the roles and interests of stakeholders from a holistic perspective. This means that the approach is not merely limited to the personal level but also integrates the levels of function and system, thus safeguarding the link to practice (Warode et al., 2018, 5-6).

## 4. FIRST STEPS FOR THE MERGER OF FRANCISCAN TRADITION AND MANAGEMENT NEEDS

In the management world, there are already various approaches which can serve as a model for the specific Franciscan approach. In this respect, the servant-leadership approach of Robert Greenleaf may be worth mentioning. While servant leadership is a timeless concept, the phrase "servant leadership" was coined by Robert K. Greenleaf in The Servant as Leader:

The servant-leader is a servant first: it begins with the natural feeling that one wants to serve first before conscious choice brings one to aspire to lead. That person is sharply different from one who is a leader first, perhaps because of the need to assuage an unusual power drive or to acquire material possessions. The leader-first and the servant-first are two extreme types. Between them, some shadings and blends are part of the infinite variety of human nature. "The difference manifests itself in the care taken by the servant-first to make sure that other people's highest priority needs are being served. The best test, and difficult to administer, is: Do those served grow as persons? Do they, while being served, become healthier, wiser, freer, more autonomous, and more likely to become servants? And what is the effect on the least privileged in society? Will they benefit or at least not be further deprived?" A servant-leader focuses primarily on the growth and well-being of people and the communities to which they belong. While traditional leadership generally involves the accumulation and exercise of power by one at the "top of the pyramid," servant leadership is different. The servant-leader shares power puts the needs of others first and helps people develop and perform as highly as possible (Greenleaf, 2018, 2002).

This approach, which comes very close to the Franciscan concept, is not the only one in management research. In addition to the servant-leadership approach, there are concepts for authentic or even spiritual leadership. This type of management concept, which is linked to ethical

principles, is assigned to the light side of leadership as part of leadership research (Nerdinger, 2014, 96-98). Harvard professor Barbara Kellerman characterises the light side of leadership with the following key sentence: "We presume that to be a leader is to do good and to be good." So, successful leadership is created by leaders who are distinguished by special character traits (e.g., trust and humility) and who transfer these good qualities into responsible thinking and acting (Kellerman, 2004, 10; Warode, 2020, 118-119).

These inputs from contemporary leadership and management concepts provide a good framework in which to reflect on a Franciscan management approach. The target categories described above, attitude as a basis for action and self-responsibility for the continuous development of relationships and processes, are characteristic of the Franciscan leadership tradition. Exactly at this point, a transfer can be made to today's management and leadership processes. The solution to challenges lies in becoming aware of one's own identity and initiating and shaping new processes at this level. This can be very well illustrated by the example of relationships. In this context, it should be noted that St. Francis and the brothers understood themselves as role models and good examples. To live this one's own attitude was ultimately the prerequisite for helping others and supporting them.

The appreciation of another person leads us to expect a sustainable relationship in the context of leadership. Through a serious interest in the other person and active listening, it is possible to identify potential and perspectives that can be positive and valuable for the community, both for the development of one's attitude and knowledge, as well as to promote and support other people in their development. The core of evangelical poverty is to encounter every person at eyelevel, which means that no distinctions are made between people. To attain this goal, the aspect of personal and community reflection must be emphasised. To discover one's own identity and to think about it, again and again, requires a deeper reflection and time. Only in this way knowledge can be built up and invested in the innovative development of processes. The basic structure of the Franciscan guiding is thus highly topical for today's management processes.

Further on, the aspect of cooperation or participation is to be emphasised independently of functions in an organization. To this end, the organization needs a clear aim and also a common code of conduct. If the undiscovered potential is to be tapped, all people must be taken into consideration and a reliable framework is needed. However, in democratic processes that involve the participation of all members, the challenge lies in finding the right balance. Can the quality of results be improved or is it rather counterproductive to have many opinions and a higher expenditure of time? This question ultimately requires the decision and competence of the leader, who has to consider the individual interests of the community (Warode, 2016, 356-357). However, there must be a culture to involve all people working in an organization on an equal level; it is a matter of clearly distinguishing between person and function.

Another aspect lies in the preservation of creation. Society and the management world today integrate a sustainable perspective into all processes. This means economic, social and ecological aspects. This holistic perspective is increasingly becoming a strategic field of action in the management world. The Franciscan tradition takes the whole of creation into account and provides a philosophical influence for the direction of the company.

In summary, it is crucial that action is taken based on an attitude based on a fixed set of values: an attitude that can function as a corrective against resistance and conflict, but also as a motor for development and innovation in organizations today. This attitude or identity is needed on a personal and organizational level in the context of the whole creation to form the basis for the person, their role(s) and a fundamental orientation on how to deal with the organizational influences (Warode et al., 2018, 7). This interaction can ultimately be described as the basis of self-leadership competence.

## 5. CONCLUSIONS

This paper attempts to encourage a dialogue between the realm of Franciscan leadership tradition on one side and the management world on the other. The following questions formed the basis of the explanations: What can be learned from the Franciscan leadership tradition for today's management and what trends in management today make the integration of Franciscan ideas in a normative understanding? By combining the Franciscan tradition of leadership with today's management topics, I want to provide an impulse for alternative solution processes in organizations; it is not about developing another functional and technical approach. In the tradition of St. Francis, it is important to be aware of one's attitude (of poverty) and to put it into practice. It is also important to live out of one's own attitude in the organizational context and the whole creation (which integrates all levels of sustainability). The Franciscan approach is characterised by the idea of serving. It is about putting your skills at the service of the whole community and involving other people. Through continuous reflection of attitude, a development process is initiated, which involves ongoing self-reflection. A clear moral stance and a willingness for self-development are two components of the Franciscan tradition that can be easily transferred to the management world since they provide basic orientation and inspiration for everyday actions such as shaping changes or coping with challenges. As described at the beginning in the context of the FraSpir questionnaire, one aim is to create a basis for training and educating programmes that will support the personal transformation process and focus on the individual attitude. In addition, the impulse serves as an inductive approach for an academic discussion of the topic. The links to leadership theories are there and so is the relevance of systemic organizational theories. The integrative connection of the attitude of Franciscan teaching is a topic area to be further explored. The successful transfer to a changing environment needs to be highlighted. For example, the further development of FraSpir is a concrete approach. The rapid changes of recent years (pandemic, energy crisis, war) have led to even more uncertainty. The reference to the impact of the VUCA world is obvious and calls for new solutions for practise. Likewise, further research in the relationship between spirituality, attitude, behaviour and the organizational aspects emerges for academic discussion.

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# Production Portfolio of Christian Charities – Doing the Right Thing and Keeping the Mission

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## Abstract

Christian charities are non-profit organizations (NPO) built on the Christian virtue of love. However, being a Christian NPO does not automatically ensure that Christian management is practiced. In this paper, the production portfolio is seen as the main criterion to determine whether a Christian NPO is indeed following Christian principles in its management. A flow chart is developed to define four categories of product lines: Touchstones are services with high relevance to the mission of the organization but without sufficient funding. Stars also make an important contribution to the achievement of the target system and are well-financed. Cash cows receive sufficient funding as well, but are not (anymore) relevant for the achievement of the original mission of the organization. Goiters might have been touchstones, stars and cash cows in former times, but today they neither do fulfill the mission of the organization, nor do they produce a positive margin. Christian charities should develop touchstones by constantly seeking upcoming existential needs of people and developing respective services. However, there is a risk that older and growing Christian charities lose their calling. Based on the Greiner curve we argue that the management of these organizations must motivate and coach their staff so that they remain dedicated to the original mission while the organization faces severe crises. By a quick and comprehensive analysis of the production program and support for the staff in particular during transgression phases, Christian management in Christian charities becomes a reality.

**Keywords:** Charities, Christian Management, Greiner Curve, Nonprofit Organization, Production Portfolio.

## 1. INTRODUCTION

Christian Charities practice Christian management (Seibert, 2020; Wilson, 2010) – what else should they do? This simple statement seems so rational and desirable that most people will assume it corresponds to reality. However, the construct of a Christian organization is as vague as the assumption that Christian management exists. It is not self-explanatory what "Christian management" really means or what makes management Christian (Kittel, 2016). At the same time, it is not easy to define what distinguishes a Christian organization from all others or how to define a Christian charity. Moreover, even if we assume that there is both Christian management and Christian charity, the relationship between these two elements is not clear at all, i.e., we have to ask whether it is more likely that a Christian organization is managed in a Christian way or whether a Christian organization will practice Christian management automatically.

These questions are not only relevant for Christian charities, but also for management scientists. These organizations have millions of employees, produce a relevant share of the national product

and are the main providers of social and health care services in several countries,[1] but they are partly ignored by management scientists. Although a number of practical guidelines for the management of Christian charities have been written (Cornish, 2009), there is little evidence whether management of these faith-based organizations differs from general management practices and whether existing models of management can or must be adapted to fit the requirements of these organizations.

Consequently, this paper develops a concept of understanding and assessing the specialty or even exceptionality of Christian charities in comparison to commercial competitors and other non-profit organizations. The research question is whether and how it is possible to keep the original mission of the faith-based organization in the short and long run while facing the same market situations as every other organization. The knowledge of the Christian production portfolio (static) and the steady change of organizational set-ups along the Greiner curve (dynamic) is crucial for the managers of Christian charities to sustain their organizations in competitive markets while still keeping their mission.

As usual for conceptual papers, this analysis is based on the existing literature, a thorough knowledge of the (European) social markets and conceptual thinking. The paper is not empirical but follows an analytical approach which was also used by other authors before. For instance, A. Jäger and his successors focused on the leadership style or the "inner axis" for Christian charities (Jäger, 1993). Our research will extend this broadly accepted concept by arguing that the production portfolio is pivotal for the definition of a Christian charity. Consequently, the next section will develop a decision model for the design of the production portfolio of a Christian charity. Finally, the question must be asked why Christian organizations are in danger of moving away from their mission as they grow.

## 2. PRODUCTION PORTFOLIO
### 2.1 Relevance
To our knowledge, no comprehensive summary exists that shows the state of research of management in Christian charities. Helmig and Michalski compared German and US-American literature on NPOs in 2008 but without a focus on Christian organizations (Helmig & Michalski, 2008). In this section, we cannot fill this research gap but would like to focus on the German-language literature on the management of Christian charities. Undoubtedly, it would be of great importance to get an overview of the worldwide state of research, but this is not possible within the scope of this paper.

With his fundamental book on "Diakonia as Christian Enterprise" (Jäger, 1993), Alfred Jäger has developed a new paradigm of Christian charities in the field of tension between theology and business administration even beyond the borders of Germany. Originally, he started from a definition of Christian charities, that relied heavily on the intention and institutional framework, i.e. any social work of churches constituted Christian Charities. However, he (and his successors) placed more emphasis on the process of diaconal leadership by calling for an "inner axis" as a Christian core surrounded by professional management (Budde, 2009, pp., S. 157). Since the fundamental work of Jäger, a Christian organization is not automatically, "what a church does", but also "how a church does it" (Lohmann, 1997; Rückert, 1997).

More recently, Fischer(Fischer, 2019), Gabriel & Ritter (Gabriel & Ritter, 2005), Herrmann & Schmidt (Herrmann & Schmidt, 2010), Schoenauer (Schoenauer, 2012) and Hofmann (Hofmann, 2010) contributed to our understanding of the management of Christian charities. Table 1 shows the management dimensions covered by these authors. It becomes obvious, that these authors

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[1] For instance, the catholic (Caritas) and protestant (Diakonie) umbrella organizations of church-related charities in Germany have about 690,000 and 599,000 employees. In addition, some 500,000 and 700,000 volunteers are working (part-time) in the respective charities.

concentrate strongly on internal processes of Christian charities. The focus is on the Christian worker, his motivation and the respect shown to him. The spirituality of workers and leaders becomes the "inner axis" (Jäger). Other aspects, that are becoming increasingly important, are quality and strategic management.

However, all these concepts of Christian charities miss the core of modern business administration, the output orientation. The business segment, the type of products, the quantity of services and the impact, which they have, do hardly play a role in these concepts. In modern management, people's needs are the basis of all entrepreneurial activity – but they seem to be neglected in these concepts.

Consequently, we can state that the process dimension of a Christian charity has been described and optimized quite well, but the central output dimension is neglected. It is important and correct to question whether an organization can be called Christian if it disrespects its employees without love. However, it is equally important to ask whether a charity is Christian if it does not serve the poor and needy. Business administration will always start from the needs of the customers, not from the intensions of the founding fathers nor the processes of the management. Most readers will agree that we would not call an arms factory Christian even if it has implemented perfect management within its organization. We will always ask whether the product fulfils our standards as Christian. Likewise, we have to ask whether a retirement home for elderly millionaires is Christian or whether a hospital can be called Christian if it provides exactly the same services as every other hospital in the country regardless of whether it is governmental, commercial or faith-based. The production portfolio of a Christian charity becomes pivotal!

| | Traditional Business Administration | | Management of Christian Charities | | | | | |
|---|---|---|---|---|---|---|---|---|
| | Gutenberg | Ulrich | Fischer | Gabriel & Ritter | Herrmann & Schmidt | Schoen-auer | Hofmann |
| Agents of production | X | | | | | | |
| Needs of customers | X | | | | | | |
| Technical core process, production | X | | | | | | |
| Quality management | | | X | | | X | |
| Social core process, teaming | | X | | | X | X | X |
| Individual core process, personality development | | X | | | X | X | X |
| Mission, vision, targets | | X | | X | X | X | X |
| Strategies | | X | | X | X | X | X |
| Decision-making | X | | | | | | |
| Motivation und leadership | | X | | | | X | X |
| Financing, investment | X | | | | | | |
| Main output | X | | | | | | |
| Other outputs | X | | | | | | |
| Outcome | X | | | | | | |
| Impact | | | | | | | |
| Legal, demographic constraints | | X | x | X | X | | |
| Value system | | X | X | X | X | X | X |
| Competition and markets | X | | | X | X | | |

**TABLE 1:** Management Dimensions. Source: own.

## 2.2 Portfolio of a Charity

The analysis of a production portfolio is frequently based on a portfolio matrix. For instance, the well-known BCG-matrix was developed in 1968 by Boston Consulting Group for commercial enterprises (Have, Have, Stevens, Van der Elst, & Pol-Coyne, 2003). The analysis assumes that an enterprise does not only produce and market a single product line but a portfolio of different products. Any commercial enterprise has to analyze its production portfolio and ensure that it has a sufficient number of cash cows to produce cash flow. At the same time, investments in question marks are necessary, so that they become stars, while poor dogs have to be given up. Most commercial enterprises would agree that the production portfolio is the starting and the ending point of all business activities.

Charities can use the BCG-matrix to analyze their production portfolio. However, increasing market share might not be the most relevant dimension of success for charities. Their main objective is to satisfy existential needs of people. Reduced demand for their services is – in contrast to commercial enterprises – a positive situation indicating that a social hardship gets less severe. Charities are often the first organizations to identify and respond to a social need by offering new services to those in need. Frequently, there is insufficient funding for these upcoming new needs so that commercial enterprises show little or no interest until the government introduces social reform and provides sufficient funding. The introduction of the new need into the Social Law encourages commercial competitors to participate in this new market so that there is sufficient supply to provide for those affected, i.e., the charity's primary objective of alleviating human need is achieved.

The norm strategies of the BCG-matrix do not always fit for NPOs. For instance, homes for older people with dementia have long been "very poor dogs" without any chance of ever becoming stars. They were held in the portfolio even though they yielded a loss. Charities have recognized it as their mission (or calling) to serve people with dementia and have followed this mission regardless of refinancing possibilities. Thus, other dimensions of a portfolio matrix might be more appropriate for charities and other NPOs.

Consequently, Schellberg suggests two other dimensions for NPOs: "ethical call" and "finance ability" (Schellberg, 2004) (Figure 1). The first dimension describes the relevance of a service for the achievement of the target system of the NPO, i.e., each NPO has to decide whether a specific service is crucial for the achievement of the target system of the NPO or not. Norm strategies can be developed for the four fields. Services, which are core to the mission and can be fully refinanced, can be called stars. They are the foundation of an NPO as they fulfill the mission of these organizations and generate cash flow to support other services without sufficient financing. Stars are potentials that meet both the business requirements and the inner call and reason why this organization exists.

Cash cows of NPOs are services, which are refinanced and generate cash flow, but they do hardly contribute to the achievement of the NPO's target system. Cash cows can develop in two ways. Firstly, the respective services can be included into the portfolio in order to produce cash flow and support other product lines with insufficient cash flow (cross-subsidy). In this case, it is almost irrelevant whether this cash cow has any relationship with the original mission of the NPO. Secondly, cash cows can be former stars, which were important for the achievement of the target systems before. However, the financeability of the services stimulated commercial competitors so that the existential need could be satisfied even without the NPO.
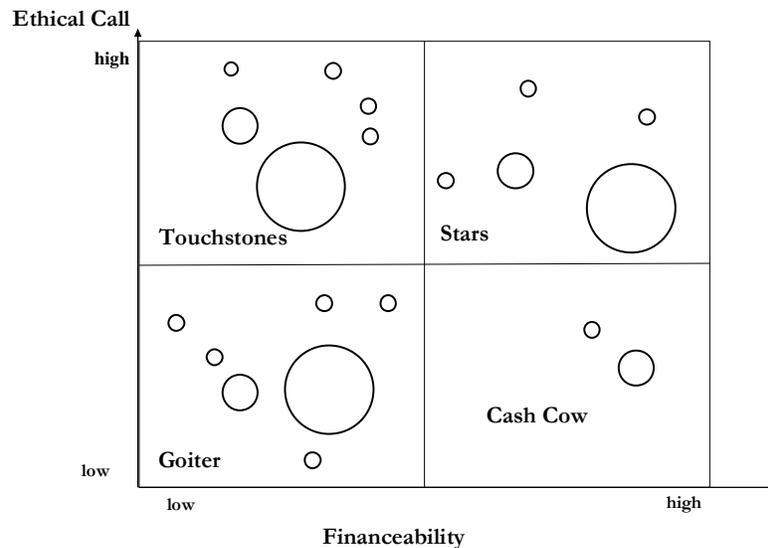
**FIGURE 1:** Portfolio-Matrix of an NPO. Source: own, based on (Schellberg, 2004).

Many social needs, however, are insufficiently financed. The government and the social protection system have not (yet) recognized this hardship of people and do not (yet) provide sufficient funding. Instead, charities fill this gap. Schellberg distinguishes two types of product lines without sufficient financing: Touchstones and goiters (Schellberg, 2004). A touchstone is at the heart of the NPO's mission. Providing this service is in line with the original mission why this institution was founded and fulfils its goals. However, a touchstone requires additional funding because it is not or insufficiently financed by revenues. Thus, touchstones can only be developed and offered if an NPO receives sufficient donations, replaces paid labor with volunteers and produces cash flow in other product lines to subsidize the touchstones. Consequently, an NPO, which wants to run touchstone services, must have cash cows to produce cash flow. The term touchstone implies that the presence and relevance of this field of the portfolio matrix indicates whether an NPO is a charity. If an NPO only focuses on areas that are fully financed from external sources, it hardly differs from its commercial competitors. We might even question whether their existence is justified. We could even challenge whether their existence could be justified.

A goiter is a service that can neither be refinanced nor contribute to the fulfillment of the specific mission of an NPO. In this case, the norm strategy should be to abandon the service. However, this is regularly emotionally difficult as many goiters are the degeneration of former touchstones. Originally, they were of great importance for the NPO, but today this service is not necessary anymore because the need has disappeared. Nobody would suffer at all if the NPO were to remove this product line from its service portfolio.

Consequently, we can conclude that a portfolio matrix is an appropriate instrument to structure and analyze the services of a charity. The main problem remains that the achievement of the "mission" or "call" is difficult to measure. One possibility is to ask the managers of the charity whether they think that a specific service has a high or low relevance within their target system. This remains subjective. Instead, we propose a decision model to allocate services to the four categories. In the next section, we demonstrate this decision model for Christian charities. No doubt, the categories would be different for non-Christian charities, but the approach could be similar.

## 2.3    Designing a Production Portfolio of a Christian Charity

If we define a Christian charity based on the intention or inner attitude, the production portfolio is almost irrelevant. However, if we focus on an output-based definition of a Christian charity, it is highly important to know whether the product lines of this NPO fulfill the mission. Figure 3shows a flow chart permitting to analyze whether a particular service of a Christian charity is a touchstone, star, cash cow or goiter. In a first step, we analyze the competitive situation, i.e., we determine whether a Christian charity has a monopoly in its catchment area for a certain service or whether there is partial or complete competition. If no other enterprise offers a certain service, the provision of this service has a high priority for the Christian charity. If competition exists, it has to be analyzed whether the quantity and quality of the alternative supply is sufficient to meet the needs of the population.

Figure 2 exhibits a standard S-shaped cost function and a linear revenue function. Under the assumption of perfect competition or in most social markets where the government or a social protection agency sets the price, the price is predetermined and cannot be influenced by the provider. Thus, the revenue function is linear through the origin. In this situation, the commercial enterprise reaches its optimum when it offers the production quantity at which the price equals the marginal costs ($x_2$). However, this quantity of services does not ensure that the entire population is sufficiently supplied with existential services. It could happen that all commercial enterprises produce at their profit-maximum but still a part of the population suffers tremendous hardship, as the total production quantity is too low at a given price.

A charity in this market does not want to maximize its profit but to satisfy needs, i.e., the charity offers the production quantity $x_3$with the revenue covering the costs  but no profit is achieved. Thus, the charity will offer more service units than a commercial provider at given cost function.
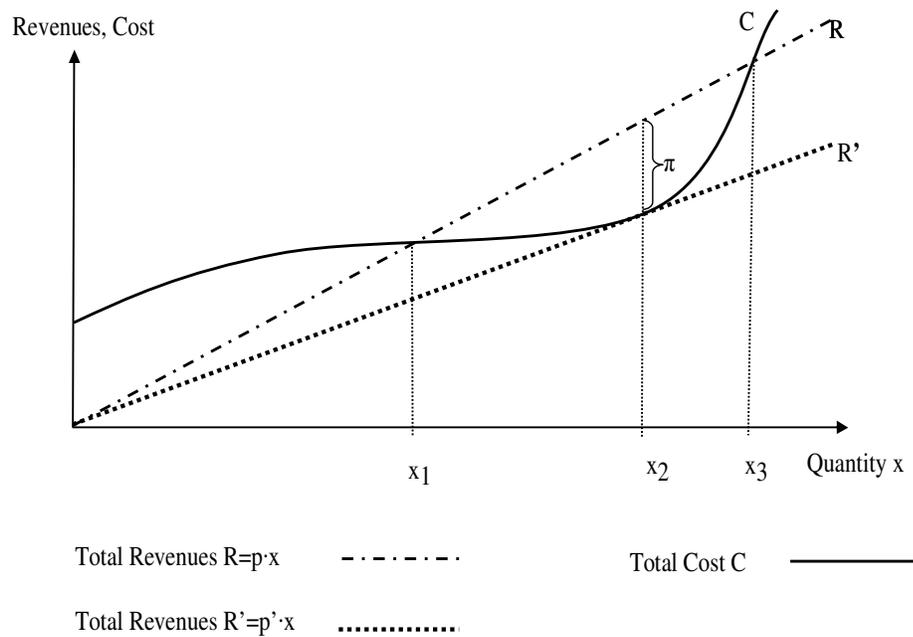


**FIGURE 2:** S-shape Cost Function and Linear Revenue Function. Source: own, based on.

In markets of existential services with structural imperfectness, a free market does not guarantee that the production quantity of all providers is sufficient to meet the existential need of all people.

If a market price declines, the slope of the revenue function decreases. R' is the function for a price of p' at which no more profit is possible. Thus, we can have the following constellations:

- $p < p'$: if the market price is lower than p', no commercial enterprise will offer the services. Christian charities will suffer a loss as well, but they might still provide services if they attach a high priority to them and can compensate for the loss through donations and/or volunteer work. They will do this because the existential needs of people would not be satisfied otherwise.

- $p \geq p'$ and $x' < x_{min}$: Commercial enterprises will offer services, but the total supply is less than that required to meet the existential needs of the population ($x_{min}$). Thus, Christian charities are called upon to enter the market and produce the service units not covered by the commercial sector.

- $p > p'$ and $x' \geq x_{min}$: In this situation, real competition exists and private providers can satisfy the entire existential needs. Thus, Christian charities are faced with strong competition and it would be no problem for the population if Christian charities withdrew from this market.

It is obvious that a Christian charity has to take the competitive situation into account as the need for a charitable supply depends strongly on the degree with which the existential needs of the population are covered by alternative providers. If we concentrate only on the processes ("inner axis", (Jäger, 1993)), we neglect the reality of competitive markets. The analysis of whether the supply is sufficient to satisfy the existential needs without the Christian charity is an ethical imperative for Christian charities.

However, even if we assume that the supply of a certain good is lacking to satisfy the needs of people, this is not yet sufficient to justify that a Christian charity enters this market. Instead, the leadership has to analyze in a second step whether the unsatisfied needs are valid and relevant from a Christian perspective. This is a unique situation for NPOs, as they have to assess whether the needs of people justify that the charity takes care of them. For instance, there might be an unsatisfied demand for precious jewellery, and most people will not be able to satisfy their needs in this field. However, to our knowledge no Christian charity was ever founded to satisfy this unmet demand. Instead, Christian charities concentrate on existential needs, such as provision of food, health care, care of elderly, disabled etc. The underlying needs are urgent and relevant, i.e., nobody will ever die because he cannot afford precision jewellery, but people will die if they cannot afford an appendectomy. Thus, Christian charities have built hospitals, but no jewellery stores. Threats to the physical existence and the dignity of human beings as well as the breach of justice and fairness constitute a scarcity, which calls for satisfaction of the respective needs by Christian charities. If there is no competition in these markets and/or if the supply of other providers is insufficient to satisfy those existential needs, Christian charities are called upon to provide the respective goods. In all other cases, Christian charities can easily leave the satisfaction of needs to the market or accept that not all needs are satisfied.

These statements should be qualified with regard to non-physical dimensions of human needs. Frequently, the services offered by Christian charities cover dimensions of utility, which are not considered by other providers. In principle, all goods (and services) can have a physical and a spiritual dimension of utility. If we can separate both dimensions, different organizations can concentrate on the different dimensions with different services. For instance, a commercial hospital can perform the appendectomy, while the spiritual counseling in the hospital can be done in this hospital by a pastor or another spiritual counselor. In most cases, there is no need that a Christian charity runs its own hospital in order to provide Christian counseling to the patients.

Nevertheless, in some cases the spiritual and the physical dimension cannot be separated. In this case, Christian charities have an incentive to cover both dimensions in their services. This is

often the case when the staff is capable and willing to provide not only the technical-functional (e.g. appendectomy), but also the spiritual service (e.g. pray with the patient before the operation). If we can unite both dimensions in one person (una persona), there is a chance that physical and spiritual needs are satisfied to a high degree. However, if we have to separate technical-functional and spiritual service in two persons, there might be insufficient justification for a Christian charity to provide the technical-functional service in a special organization. Instead, the Christian charity should cooperate with other organizations (e.g. commercial hospitals) to offer the spiritual dimension in these institutions.
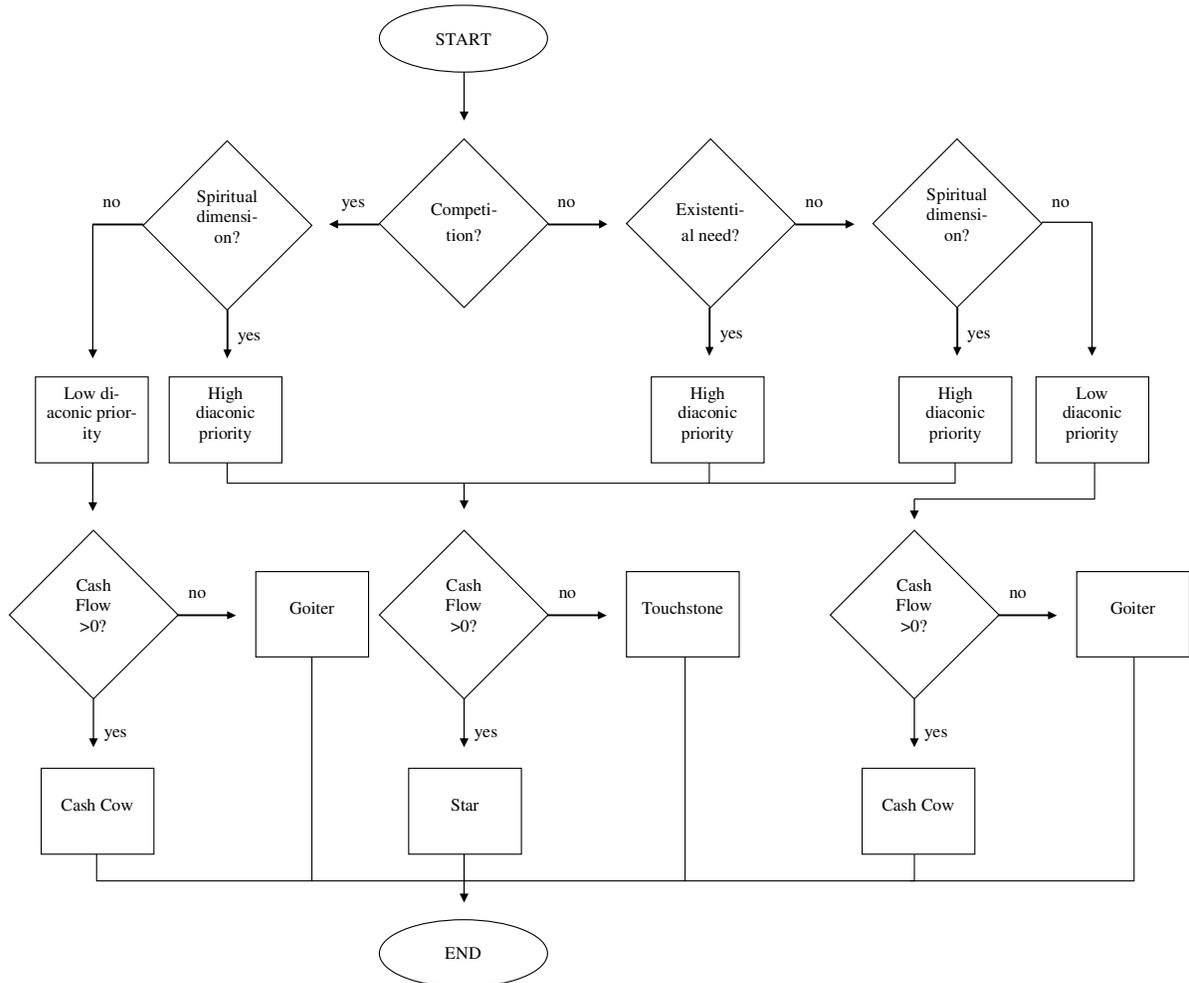


**FIGURE 3:** Portfolio-Analysis of a Christian Charity. Source: own.

As Figure 3 shows, we can distinguish the potential services of a Christian charity according to their diaconal priority. Services, which satisfy the existential needs of people, and services, which cannot be separated from the spiritual dimension, require a high diaconal priority, even if the competitors could provide the technical-functional service as well. Services which can be offered by others in sufficient quantities as well and which have no spiritual by-product can easily be left to the competitors.

However, there are business fields of Christian charities, which have a low diaconal priority but still are relevant for the entire organization because they produce cash flow, which can be used to

subsidize other business fields with a higher diaconal priority. As shown in the last section, these cash cows are essential for financing innovative product lines with insufficient funding but high contribution to the target system of the NPO (touchstones). Product lines, which do neither have a high diaconal priority nor produce cash flow to subsidize other services (goiter), are unnecessary like a fifth wheel and should be given-up. Stars, finally, have a positive cash flow and a high diaconal priority. For the time being, it is ideal to have these services, but we have to keep in mind that the success of these product lines calls for commercial competitors so that most stars will become cash cows after some time (and finally goiters). Thus, a Christian charity must innovate, research new unmet needs, develop new services and constantly change its production portfolio, or it will end up with many goiters and complete irrelevance for the satisfaction of the existential needs of today.

Figure 3 shows a flow chart, which can support the leadership of a Christian charity in analyzing its production portfolio. Based on this chart we can state, that there is indeed a Christian management in Christian charities – but it is less about the "inner axis"(Jäger, 1993)than about the production portfolio. Certainly, a Christian charity has a Christian target system and should practice a leadership style of Christian love. Nevertheless, it is at least as crucial that a Christian charity must produce services for people whose physical and/or spiritual needs could not be met without that organization.

## 3. KEEPING THE MISSION

Most Christian charities start with touchstones, i.e., they are founded to address a new and unmet existential need. Faith-based hospitals, homes for older people, mobile nursing care, soup kitchens, dementia care managers, homes and labor opportunities for disabled etc. were established in order to address a problem for which the society, the social protection system and the government had no solution yet. There might be Christian charities starting their mission with a star, but we have never seen a Christian charity focusing from the very beginning on cash cows or goiters. However, an analysis of existing Christian charities in Germany indicates that this situation changes. Decades after the Christian charity was inaugurated, the mission can drift away towards services offered by all commercial and non-commercial competitors. The original "call" or "mission" can easily get lost.

In this section, we will argue that this development or "mission drift" follows principles and occurs regularly. For this purpose, we apply the so-called Greiner curve (Greiner, 1998) and analyze its potential for understanding of organizational development of Christian charities.

Greiner analyzed the development of enterprises from foundation to their maximum of success (e.g. turnover). He recognized that business development is almost never linear, but successful and growing enterprises pass through a series of crises ("revolutions"). Substantial changes are normal and a symbol of healthy development of an organization, including changes in turnover, financing, organization and leadership. Greiner is convinced that an enterprise can only avoid these phases if it remains small in a business niche, i.e., success and growth of an organization lead to a pressure of change. This is in line with the theory of dissipative systems indicating that growth generally happens through a series of crises (Ritter, 2001).

The respective phases are presented in Figure 4. Originally, Greiner distinguished five phases, and only later the sixth phase was added. An enterprise is founded in a phase of high creativity. A fascinating idea inspires the entrepreneur or a group of founders to establish the organization. Frequently, the "founding fathers" (or mothers) have a great charisma and take others on board. Only few people are involved, but they all identify perfectly with the mission of the enterprise. Coordination is easy because all workers are intrinsically motivated and subscribe to the organization's mission. Consequently, there can be very little control  as the success of the enterprise in the market shows everybody whether they are right. However, if this organization growths (in turnover, personnel, product lines,…), this leadership philosophy faces its limitations.

The charisma of the entrepreneur is insufficient to lead the growing organization and it faces a leadership crisis.

Consequently, the entrepreneur or small group of founders will look for professional managers who can solve this leadership crisis in the second phase, the phase of direction. New staff is more extrinsically motivated and have more inspiration from power and business success than from the original mission of the founding fathers. Managers control the enterprise by standardization within a growing and strict hierarchy (including a growing middle line (Mintzberg, 1989)). The original workers have a hard time accepting that "their" organization has changed too much and some will leave it completely frustrated. Even other workers will suffer from a centralized, non-transparent and inflexible leadership and organization. The members of staff become "cogs in a machine" without a chance to live-up to their personal call for existential meaning and autonomy. The more the enterprise grows, the stronger will the crisis of autonomy will get.

The answer to this crisis is more delegation. In the third phase, the leadership tries to achieve a higher degree of decentralization in order to get the operating core (Mintzberg, 1989) on board. Decisions are delegated, independent profit centers are defined and self-organizing groups are installed. Consequently, the coordination by direction declines, while coordination by standards increases. Only exceptions are regulated on a higher level. However, even here the solution to the old crisis holds already the seedling for the new crisis. The organization runs the risk of breaking up into parts, which are competing without a common mission and without unified leadership. The result of solving the crisis of autonomy is a crisis of control.

Consequently, the leadership of the organization implements formal coordination mechanisms based on a strong techno structure consisting of various staff positions and departments. In this way, the techno structure has a wide range of control while offering at least some autonomy to the operational core. The control is enforced by agreements on achievements of goals (management by objectives). However, there is a risk that the organization will be dominated by the techno structure and growing enterprises might face a lack of trust in this phase in the entire organization. Bureaucratic coordination by staff departments was implemented to overcome the crisis of control, but it leads to a crisis of trust.

In the fifth phase, the phase of cooperation, the management attempts to improve the cooperation between all departments and workers, strengthen networking and foster the information organization so that the processes are self-organized. Control is not strictly based on staff departments, but social and self-control are fostered. However, even networks reach their limits, in particular when the social core processes are suboptimal (Rieckmann, 2000) which might precipitate a crisis of growth. The organization is so much engaged in organizing its internal structure and networks, that the output function is neglected.

Many enterprises respond to this crisis of growth with a phase of alliances, i.e., they cooperate with other enterprises, merge with them or find some other form of alliance. The results are frequently mixed groups with strongly differing cooperation cultures which might cause a crisis of identification. The original organization with its mission, values and culture is gone and a new identity cannot be recognized – why should one give his best for this organization?

Consequently, Greiner states that the strategy to overcome the old crises carries the seed within itself for the development of the new crisis. For commercial enterprises in a highly competitive market, this means that an enterprise either has to withdraw into a small niche and persist there, or it has to accept steady organizational change. To moderate this change and support the workers to accommodate its impacts on their roles is a major challenge of business administration (Doppler & Lauterburg, 2019).
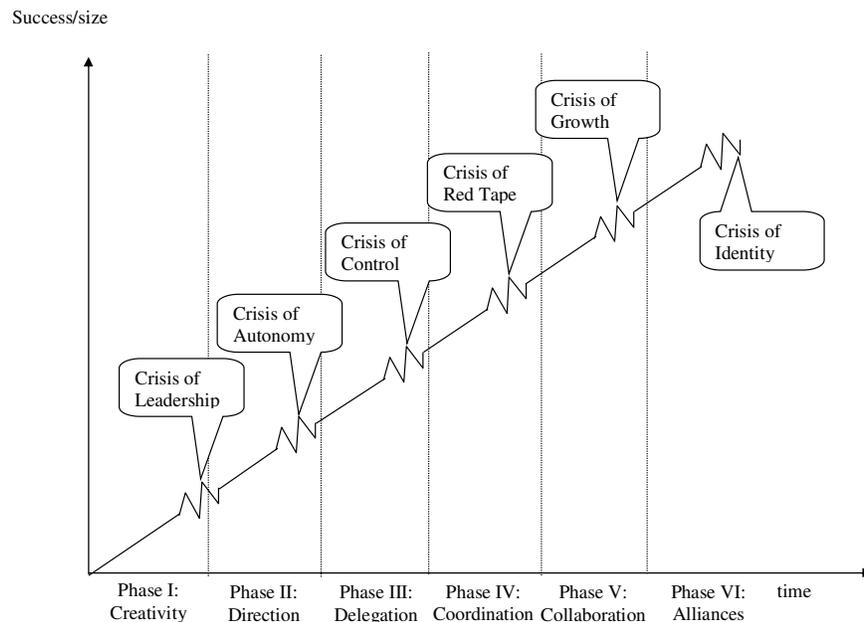
**FIGURE 4:** Greiner Curve. Source: (Greiner, 1982).

The Greiner curve is useful to understand the dynamics of the organizational development of Christian charities. We will use the faith-based hospitals in Germany as examples, but are convinced that the principles can be applied more broadly. The creativity phase of many faith-based hospitals in Germany was the second half of the 19th century when most of them were founded (Städtler-Mach, 1993). The "founding father" was frequently the local pastor or priest who ruled strictly and directly over a huge operational core. The operational base was often formed by nuns or deaconesses who strictly adhered to the commandments of their executive and spiritual leader. However, the strong growth of these institutions overwhelmed the non-professional managers, so that frequently professional managers took over after some time and in particular, when the "founding father" died or retired. At the same time, the early 20th century saw the professionalization of physicians and nurses calling for more autonomy from the strict leadership. In particular, doctors in charge insisted on more independence from the spiritual leaders so that a phase of delegation started. The departments and in particular the heads of departments became very independent, so autonomous that the "demigods in white" protected their own "clinical kingdoms" and practiced a certain departmental egoism. The hospital leadership responded to this crisis by developing quality management to standardize procedures in the hospital. Nevertheless, this standardization took power away from the heads of departments and shifted it to anonymous staff departments (e.g., quality management, public relations, legal affairs, revenues dep.). In particular, the revenues department became more and more important, and many members of staff complained that the income generation dominated all nursing and medical procedures, and even the original spiritual mission seemed to be forgotten under the dominance of accounting.

The increasing power of the administration provoked resistance from the operational core, in particular of those who still fully believed in the original mission of the faith-based hospital to care for the poor and needy, and not for those who are well insured. Bureaucracy (an ideal for Max Weber (Weber & Swedberg, 1999)) became an insult. Consequently, the leadership called for more self-organized cooperation between the departments. For instance, centers were developed to coordinate certain functions without interference from the strategic apex or the techno

structure. For instance, a spine center unites the departments of general surgery, orthopedic surgery, rehabilitation, imaging etc. However, frequently enough these centers end up in quarrel and with a negative margin (Gerste, 2008). Consequently, the late 20th century and early 21st century have seen a huge number of alliances between faith-based hospitals ranging from joint purchasing and training of staff even to complete merge of hospitals with very different traditions. This was in particular a challenge for faith-based hospitals when hospitals without a Christian tradition and culture merged with them regardless of the direction: Commercial hospitals bought faith-based hospitals, and faith-based hospitals took over secular governmental or commercial hospitals. In all cases, the loss of culture of cooperation is lamented – and it holds the seedling for the next crises of faith-based hospitals.

The example of faith-based hospitals indicates that it is extremely difficult to keep the original mission. There is a need to change the organization, the leadership style, the instruments of control and cooperation while an organization develops. At the same time, there is a need to change the product lines of the production portfolio. However, there is always a risk that the original call is forgotten and that the organization drifts away from its original mission. Based on the dynamics of the production portfolio and the Greiner curve we can conclude, that a "mission drift" (Lin, 2019)is almost inevitable unless the management of the organization regularly analyzes its production portfolio as well as its organization and leadership. The older and more successful a Christian charity gets, the higher the risks that it is far away from its original call – and the more likely there is not much left that really distinguishes the Christian charity from its commercial competitors.

## 4. CONCLUSION
Based on this analysis we can conclude that there is no automatism that leads automatically to Christian management in Christian charities. This seems like a bad massage for leaders of Christian charities, but the good intention alone is insufficient to define Christian management. Instead, Christian charities will only qualify to practice Christian management if they do also produce services addressing existential and spiritual needs of people, which could not be covered by potential competitors. Thus, the output of a Christian charity strongly determines whether Christian management is practiced. Christian management is not only a question of "how" we do things, but in particular of "what" we do. Doing the right thing – serving the poor and needy defines a Christian Charity.

In addition to the static dimension of doing the right thing today, leaders of Christian charities have to address the dynamics of keeping the mission, i.e. doing the right thing also in future. We can assume that most Christian charities start with a strong Christian mission. However, there is a risk that this call will be lost over the years. On one hand, the original services offered might not be relevant any more or (commercial) competitors will take over the market so that there is no more need for the Christian charity. On the other hand, success of the Christian charity will challenge the original set up so that the original mission is lost, original staff leaves, staff with similar motivation is not attracted and the Christian charity becomes a "normal" enterprise. These NPOs impress with huge turnovers and thousands of employees. However, neither the production portfolio nor the style of leadership distinguishes them at all from commercial enterprises.

What can Christian charities do to keep their mission? How can Christian management become a reality in Christian charities? Based on the analysis presented in this paper we can give two clear answers: Firstly, the management of these organizations should ensure that their production portfolio is always in line with their original mission. The model presented in Figure 3 is an instrument that allows a quick and comprehensiveanalysis of the profile of a Christian organization. It requires courage to give-up goiters and to use the cash flow from cash cows completely to invest into new touchstones. Moreover, it needs creativity and innovativeness to focus much more on upcoming existential needs. There is so much more to be done on this

world, so much suffering to be fought and so much pain to be relieved – there is so much room for new ideas to serve the poor and needy.

Secondly, Christian charities must invest into their paid and unpaid staff. It has been shown by different authors that the commitment of the employees is of high importance for the success of an enterprise, even beyond Jäger's "inner axis" (Dorda & Shtembari, 2020; Markova & Jones, 2011). However, for a Christian charity the spirituality of their workers is crucial. Figure 3 showed that the co-production of technical-functional and spiritual dimensions of a service offers an almost indefinite market in which Christian charities have no or little competition. But this requires personnel who are really committed Christians. Thus, the selection, coaching and spiritual support of workers decide whether a Christian charity will indeed be able to practice Christian management.

Furthermore, the Greiner curve indicates that the main source of crises is the staff. If they feel neglected, forgotten, abused, de-motivated and over-controlled or if they lose the call for the special mission of this organization, tremendous crises will come. Traditional management will answer as described by Greiner. Nevertheless, Christian managers should put much more focus on their staff, their Christian motivation and their spiritual needs.

Our paper closes with a call for more research on management of Christian charities. As we have seen in section 2.1, most research in this field focuses on mission, vision, strategies and value systems. A thorough analysis of the output dimension of Christian charities from a business administration and from a theological perspective is urgently needed and our paper can only be a starting point. For instance, in this paper we cannot address the question how Christian charities can practice Christian management if only a small minority of their staff are baptized Christians. This is a reality in Eastern Germany, but still there are many faith-based charities. Figure 3 indicates that the spiritual dimension makes the difference – but how can this dimension be provided by Christian charities? Will it require that all workers are committed Christians? Or only the managers? Or is it sufficient if the board of directors is filled by Christians? Many research questions arise from the output dimension of Christian charities and call for further research.

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# "Right-sized," Contextualized Faith: The Challenging Cooperation of FBDOs with Institutional Donors

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## Abstract

This paper explores the challenging cooperation between faith-based development organizations (FBDOs) and institutional donors. It argues that FBDOs need to find their "right-sized," contextualized faith by understanding their unique developmental and spiritual contributions and the challenges they face. Five distinctive contributions of FBDOs are described: extensive networks, community engagement at multiple levels, holistic and innovative approaches, higher trust level, and spiritual capital. Then four challenges they face are set forth: instrumentalization, a need to constantly prove themselves, proselytism, and downplay of spiritual identity. In light of the FBDOs distinctive contributions and challenges, seven practical recommendations for FBDOs to achieve "right-sized," contextualized faith are presented, namely, to aim for a) "right-sized, contextualized programs, b) "right-sized" funding, and c) "right-sized" faith.

**Keywords:** FBDO, Faith-based Organizations, Institutional Donors, Faith Identity, Humanitarian Development, Spirituality.

## 1. INTRODUCTION

Perhaps no other interface is as important as that of faith and management in the context of humanitarian development work. More than 700 million people including an estimated 356 million children are still living in extreme poverty, struggling to survive on less than $1.90 a day. Even more staggering: 1 billion—the number of children worldwide who are multi-dimensionally poor – without access to education, health, housing, nutrition, sanitation, or water (UNICEF, 2021). Multiple international donors such as World Bank, The United Nations, USAID, and European Aid coordinate a multitude of humanitarian development and disaster response activities. Inevitably, they encounter one formidable force which demands special attention: religion. 84% of the world's population is estimated to belong to some religion (Pew Research Center, 2015). For most people of the "South" spirituality is integral to and inseparable from their understanding of the world and their place in it. Religion, therefore, is central to their decisions about their lives and their communities' development (Ver Beck, 2000, p. 31).

At the interface of development and religion, Faith Based Development Organizations (FBDOs) have emerged as influential actors. Among evangelical mission agencies, six of the seven largest are now FBDOs. These six are Christian Aid Ministries, Compassion International, Feed the Children, Food for the Hungry, MAP International, and World Vision (King, 2012, p. 924). These FBDOs are unique in the ways that faith identity is expressed through development. FBDOs are not simply faith or development actors but faith based development ones. Their impact depends on the interaction of faith and development: "faith identity feeds development interventions, which in turn feed back into the perceived faith identity" (Jennings, 2021, p. 73). This interaction of development and faith consequently gives rise to a critical question: how can FBDOs cooperate with institutional donors while maintaining their faith identity?

Mandaville et al. (2017, p. 11) coined the term "right-sized" religion in a very narrow sense as that in which religion avoided any extreme expression. Bartelink et al. (2020, p. 49) broadened the meaning of "right-sized" religion as that in which religion was assigned an appropriately important role. In my view, however, the term "right-sized" religion can be used of FBDOs only when they have considered fully two things: a) their unique spiritual and developmental contributions and b) the perception that external stakeholders, such as communities, governments, and institutional donors, have of their spiritual identity and the specific contributions they make. This paper argues that the challenge for FBDOs is to find their "right-sized," contextualized faith through a clear understanding of their own unique spiritual contributions.

**Definitions: Faith Based Development Organizations (FBDOs)**
FBDOs are not a homogenous group of organizations. Some are nearly indistinguishable from other NGOs, but others seek actively to evangelize (Benedetti, 2006, p. 853). A widely cited definition of FBDOs is "any organization that derives inspiration and guidance for its activities from the teachings and principles of a faith or from a particular interpretation or school of thought within that faith" (Clark et al., 2008, p. 6).

El Nakib et al. (2015, pp. 6-7) introduce the following topology for FBDOs: a) international faith-based organizations as major players, b) national faith-influenced organizations, c) local faith-influenced organizations, d) local faith networks, e) informal local faith communities mobilizing in the context of crisis, f) local faith leaders. This topology classifies religious actors based on their organizational structure and realm of influence. The principal mission of FBDOs is directly to fight poverty by developing and implementing programs that help the poor and by raising awareness of poverty among various stakeholders (Clarke, 2006, p. 841).

Unruh and Sider (2005, pp.114-118) propose six types of organizations, i.e., faith-permeated, faith-centered, faith-affiliated, faith-background, faith-secular partnership, and secular. Each type of organization is analyzed taking into consideration eight organizational characteristics such as mission statement, founding, affiliation, controlling board, senior management, other staff, personnel religious practice, and support. Furthermore, four religious program characteristics are added which are religious environment, program content, integration of religious components, and expected connection between elements and desired outcomes. The advantage of this model is that it is multidimensional; recognizing that the religious characteristics of an organization may differ from the specific programs it operates and may also depend on the specific context of the activities planned.

**Religion as Development Taboo**
Ver Beek (2000, p. 37) scanned three of the most prominent development studies journals for articles on religion and spirituality from 1982 to 1998. He found that the topic of spirituality was systematically avoided and played no central role at all. Spirituality, he concluded, seemed to be "a development taboo." Marginalized by modernization and by Marxist ideology, religion was for long absent or peripheral at best in the development arena (Freston, 2015, p. 141). Humanitarian development was firmly located in the secular domain and set strictly apart from religion. We encounter, therefore, a pervasive secular-religious dichotomy (Fountain, 2013, p. 9).

**Emerging interest of Governments and Multinational Organizations**
Three major events--the World Bank Development Dialogue on Values and Ethics in 1998, US President George W. Bush's Faith-Based Initiative and the war on terror in 2001, and the Kyoto Declaration in 2006–are crucial milestones in the emergence of FBDOs as important in development. These events brought about an emerging interest of governments and institutional donors towards joint development activities with FBDOs.

The first event was the Development Dialogue on Values and Ethics, established in 1998 by James Wolfensohn, then president of the World Bank together with George Carey, then

Archbishop of Canterbury (Jones, 2011 p. 1294). This Dialogue served as the primary focal point for engaging with religious leaders and faith-based organizations (Fountain, 2013, p. 15). It initially received little attention from development institutions. Nevertheless, Wolfensohn clearly cast a vision of engaging faith communities in the fight against poverty, considering them vital to the success in achieving the Millennium Development Goals (MDGs). He also saw great potential for new and different forms of partnership that would utilize the respective strengths of the different communities (Marshall, 2004, pp. xi–xiii).

The second ground-breaking event was President George W. Bush's 2001 Faith-Based Initiative. Its effectiveness has been questioned (Heist, 2016, p. 3) and its motives have been challenged in the light of Bush's war on terror (Holenstein, 2005, p. 32). In his Faith-Based Initiative, Bush signed several executive orders to eliminate pervasive government discrimination against FBDOs receiving federal funding. To end this discrimination, the President established the White House Office of Faith-Based and Community Initiatives (OFBCI) along with subsidiary centers across eleven federal agencies, including USAID (Turner Haynes, 2021, pp. 3-4).

The third significant event took place in Kyoto, Japan in 2006. The joint declaration of "A Multi-Religious Commitment to Confront Violence against Children" was formally adopted there at the Eighth World Assembly of Religions for Peace. The Kyoto Declaration has served as an invaluable resource for those engaged in multi-religious cooperation and advocacy for children (Kyoto Declaration, 2006). One of the most encouraging signs of a closer cooperation with FBDOs is the establishment of the International Partnership on Religion and Sustainable Development (PaRD, 2021), organized by the German Government Development Agency (GIZ). PaRD brings together development "partners from all over the world to harness the positive impact of religion and values in sustainable development" (Tomlin, 2021, p. 111).

The Kyoto Declaration further advanced the cooperation of institutional donors with FBDOs as they and religious groups became important partners in UNICEF's work with children across the globe (Grills, 2009, p. 507). UN High Commissioner for Refugees António Guterres acknowledged that faith-based actors had a role to play from the beginning of a crisis. They could promote durable solutions, prevent conflict, and help refugees integrate in their new communities (Guterres, 2012). The changed attitude of institutional donors led to increased funding for FBDOs. For example, US foreign aid to faith-based groups almost doubled from 10.5 per cent in 2001 to 19.9 per cent in 2005 (James, 2011, p. 114).

Surprisingly, FBDOs have gone from "marginalized to legitimized, to prioritized actors in international development" (Turner Haynes, 2020, p. 2). Initially, the interest in religion was driven particularly by big multilateral and bilateral donors rather than by universities and research organizations (Jones et al., 2011, p. 1292). In a remarkable about-turn, however, development studies have rediscovered religion and devoted considerable effort to analyzing FBDOs (Feener et al., 2018, p. 1). Such studies became an invaluable reservoir of knowledge and insight into the complex and urgent questions FBDOs were now forced to deal with due to their prioritized status for institutional donors. Would an influx of donor funding alter a FBDO's way of planning and implementing program activities, its religious practices, and spiritual identity? If yes, how? What distinctive contributions can FBDOs make in working with donors? These questions are still crucially important.

## 2. METHODOLOGY

Literature was identified through database research focusing on academic journals, book chapters, evaluation reports, and institutional donor websites. Minimal use was made of FBDOs' own media coverage and promotional materials to ensure a more objective perspective on how FBDOs are perceived by external stakeholders. Sources were selected based on quality and relevance to an exploration of the interactions, perspectives, and perceptions between FBDOs and institutional donors. It is important to note, however, that not every study published on

FBDOs and religion could be included in this review. The author chose to confine the search and subsequent analysis of literature to studies which could contribute to the concept of "right-sized," contextualized faith. Many high-quality studies were excluded from this review because they were not directly relevant to the research question.

In addition, as a practitioner, the author shares some current experiences and perspectives that could complement the findings of the literature review.

## 3. LITERATURE REVIEW
### 3.1 Distinctive Contributions of FBDOs
One way to assess how FBDOs can make distinctive contributions to development goals and programming is to review different aspects of their activities: a) inputs (design of programs, source of funding choices), b) ways of operating (selection of staff, beneficiaries, and religious practices), c) outcomes (activities), and d) impact (achievement of development objectives) (Radoki, 2012, p. 646). These aspects of distinctive FBDO contributions focus mainly on tangible and quantifiable matrixes. Secular agencies appreciate the social and access capital that FBDOs bring to the table. Less acknowledged, however, is the importance of harnessing FBDOs' spiritual capital, drawing on faith traditions, spiritual practices, teaching, and authority (Palm et al., 2019, p. 2). The first step for FBDOs to find their "right-sized," contextualized, faith is to identify and assess what distinctive organizational and spiritual contributions they can make. We suggest five distinctive contributions.

**Extensive Networks**
An outstanding strength of FBDOs consists in their extensive networks. They have often established enduring and extensive horizontally and vertically organized networks comprised of affiliates, congregations, individuals, and organizations. These networks serve both as highly effective channels of communication and as channels of human and financial resources. Large national social networks offer the potential to engage powerfully in advocacy and reconciliation activities (James, 2011, p. 113). UNFPA emphasizes the importance of FBDOs' distinct moral standing, broad social networks, and their ability for fast social intervention. FBDOs are capable of mobilizing "legions of volunteers which no other institution can boast worldwide." They are also owners of the "longest standing and most enduring mechanisms for raising financial resources." This ability is especially relevant at a time when traditional secular organizations face serious resource shortages (Karam, 2014, p. XI). FBDOs probably provide the best social and physical infrastructure in the poorest communities because churches, mosques, temples, and other places of worship are focal points for the communities they serve (Jones, 2011. p. 1296). Often this social infrastructure has been gradually built up over a long time with most FBDOs having a long-term track record of presence and service in their geographical areas (Davis, 2011, p. 136). World Vision, for example operates *Area Development Programs (ADPs)* with the duration of 10-15 years tailored to address the needs of a specific community. Typically, ADP team members are based in a small office in the district where the ADP is located. They can work closely with government partners and communities on a daily basis.

**Community Engagement at Multiple Levels**
The long presence of FBDOs in their areas of development profoundly influenced the attitudes, beliefs, and norms of communities. The also contributed to multiple socio-ecological levels of influence, through tailoring communication with congregants (Kraft, 2020, p. 7). If FBDOs can impact a target community at several levels, they will greatly increase the efficacy of programs (Kraft, 2020, p. 6).

A convincing example of this increased efficacy occurred when Byran et al. (2020, pp. 1-3) conducted a randomized control trial on the work of International Care Ministries (ICM), a local evangelical Protestant anti-poverty organization, founded by Filipino pastors and operating through a local network of pastors in the Philippines. The 16-week program consisted of three

teaching components, namely a) Christian theology, values, and character virtues, b) health behaviors, and c) livelihood (i.e., self-employment) skills. Participants were ultra-poor people, most of them with a religious background. The evaluation showed that 6 months after the end of the program, the participants reported higher income and increased religious intensity. 30 months after the end of the program the relative economic status was higher with a consistent religious intensity. The authors propose that the economical improvements were related to greater perseverance of effort. This study indicates the improved efficacy of reaching out to the community at different levels (spiritual and economical). The spiritual component appears to improve the dedication and perseverance of the ultra-poor beneficiaries as they deploy their newly learnt self-employment skills.

**Holistic Programs**
FBDO are especially well suited to foster holistic programs, which address multi-dimensional needs such as physical needs in tandem with spiritual and social needs (Kraft, 2020, 7.) For example, The Lutheran World Federation and Islamic Relief Worldwide jointly developed a "Guidance on Mental Health and Psychosocial Programming." What makes this "Guidance" outstanding is that it integrates care management, psychological interventions including structured counseling, and a consistent focus on the faith and community resources, offering a sense of hope despite traumatic circumstances (French, 2018, p. 7).

Holistic programs fall and raise with the level of staff engagement in general and more specifically the faith of the staff as source of motivation for ensuring compassionate and personalized care.

Van Wees (2020b, pp. 177-187), for example, analyzed how donors engaged with FBDOs in the Cameroonian health system, focusing specifically on Christian Health Centres of Excellence. As one health official commented: "the patient is at the centre of everything" (Van Wees, 2020b, p. 182). Even more essential, however, for health officials was the FBDO's ability to provide specialized care due to the advanced equipment which was funded through its consistent donor engagement and links to Christian mission agencies. Consequently, one official stated proudly: "our clinic is like a European hospital."

Research on how FBDOs provide relief materials to people with AIDS/HIV in Nigeria confirms the centrality of faith for holistic programming and staff motivation. As part of their program design, FBDOs include dedicated counselors who are available to offer support for individuals facing challenges. As a result, recipients can foster their spiritual development as well as their material wellbeing (Davis, 2011, p. 136).

**High Levels of Trust**
Close and lasting relationships between FBDO staff and beneficiaries require a high level of trust. The World Bank was one of the first international donors acknowledging that FBDOs have a strong reputation of establishing trust in the communities they serve. "Most state institutions score poorly. NGOs and religious organizations are more trusted than state institutions" (Narajan-Parker, 2000, p. 199). Hilary Benn, UK Secretary of State for International Development, affirmed that FBDOs are among the most accessible and trusted institutions of the poor (Aiken, 2010, p. 3). FBDOs build trust by the ability of their staff to reach people at the grassroots level (Ware, 2016, p. 14), to speak their language and to respect their sentiments and culture (Heist, 2016, p. 5). Important also are the FBDO staff's compassionate and considerate working attitude, the so-called "servant-hearted" approach to assistance (Aiken, 2010, p. 9). FBDOs also have longstanding relationships with poor communities. Ager (2018, p.4) observed high staff turnover in both non-governmental and governmental organizations. In contrast, religious leaders occupied long-term leadership positions. We need to note also that it is much easier and more likely for FBDOs to form trusting relationships with local communities where their faith identity and programs align with local religious beliefs (Davis et al., 2011, pp. 142-3).

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**Spiritual Capital**
Since faith plays an important role for FBDOs' holistic programming and staff members' motivation, it can be termed "spiritual capital." The locations and circumstances of different beneficiaries appear to affect the role faith has. Spirituality, faith in God, and connection to the sacred in nature are an integral part of poor people's lives in many parts of the world (Narajan, 2000, p. 222). The poorest are usually hit hardest by crises and disasters.

Pargament et al. (2010, p. 195) suggest four major functions of faith in the face of adversity: a) meaning, which can provide hope in times of crisis, b) emotional comfort or reduced fear due to the presence of a benevolent deity, c) interconnectedness with a group having a common set of beliefs, practices and values and d) most importantly, communion with and knowledge of the sacred. Hope changes how events are perceived. It encourages people to go beyond the visible and to search both for hidden meaning and purpose and for the transcendental other.

Lessons learnt from the Haiti earthquake response confirmed that spirituality contributed to improved quality of life and mental health by reducing anxiety and depression and by causing fewer instances of suicide and alcoholism (Schafer, 2010. p. 123). Based on extensive fieldwork in Sudan, Holton (2010, p. 7) argues that "the ability of a community to see their own role in the story of God in the world, especially in times of tragedy, provides a deep well of resilience that fosters hope and may help mitigate the damaging effects of trauma." Hope plays a crucial role in any humanitarian crisis. It serves as an effective antidote against dependence, desperation, fear, powerlessness, and resignation that are root causes for many development problems and barriers against behavioral change.

Spiritual teaching emphasizes some critical principles both from a development as well as a faith perspective such as compassion, justice, reconciliation, and stewardship. Compassion and care for the poor is at the heart of most religions. Justice is the bedrock of development. Reconciliation is central to many religions and are desperately needed in the world today (James, 2011, p. 113). Many programs include teaching components with a spiritual background. World Vision as a global interdenominational Christian relief, development and advocacy organisation helping children, families and communities overcome poverty and injustice, irrespective of religion, race, ethnicity, or gender developed the Channels of Hope (CoH) program. The CoH is probably the most widely used curriculum with extensive spiritual teaching. This program, originally designed to help churches respond to HIV/AIDS, gradually grew and has been used to mobilize faith communities for the care and prevention of both HIV/AIDS and Ebola in Christian and Muslim communities. It was also used to foster maternal and child health and child protection. It includes examples of biblical or religious teaching, encouraging participants to revaluate certain habits and structures in their lives, families, and communities. For example, a woman from Zimbabwe, shared that CoH had brought "spiritual growth and change of behaviour in the community" (Bartelink et al., 2020, p. 51).

Transcendental power is at the heart of faith-based development. FBDOs generally tend to believe that divine power energizes human spirits and may even go beyond human effort. For example, many faiths believe that prayer unleashes an "extraordinary" power into development (James, 2011, p. 114). FBDOs often view humanitarian development as caused by divine intervention mediated through human efforts. In 2015, the World Bank together with representatives from major world religions and heads of global FBDOs, launched a passionate call for action to end extreme poverty by 2030. David Beckmann, President of the global FBDO Bread for the World, expressed his view that the unprecedented progress of reducing hunger and poverty is an "example of our loving God moving in the contemporary world, and God is inviting us all to get with the program" (World Bank, 2015).

## 3.2    Potential Challenges for FBDOs

FBDOs need to be aware of the challenges and potential pitfalls of dealing with institutional donors. We suggest that five areas deserve special attention.

### Instrumentalization of Faith Actors

FBDOs need to be aware that they can be used by international donors focusing on their own goals rather than being treated as equal partners (Tomlin, 2018, p.3). Most institutional donors still view development as a secular domain. They are willing to engage with the institutional forms of faith (large and well-established FBDOs), but they remain suspicious about the spiritual dimensions of faith (James, 2011, p. 114).

Both institutional donors and FBDOs are aware that the dynamics of their relationship is diverse, complicated, and prone to the risk of mutual instrumentalization (Karam, 2014, p. V).

FBDOs may be tempted to instrumentalize donors by using government funding not only to implement development program activities but also to promote religious or denominational messages. On the donor side, during the George W. Bush administration, USAID was used to instrumentalize INGOs by favoring FBDOs with democratic background and by withholding funding to Islamic NGOs.

Such instrumentalization of FBDOs can pose serious financial and reputational risks because of sudden shifts of funding priorities or misuse of FBDOs for political goals. FBDOs relying in their programs on donor funding need constantly to monitor the evolving landscape of shifting government priorities. A recent example is the shift of the US government priority and funding from HIV/AIDS to malaria. Although considerable resources were spent on HIV/AIDS assistance and prevention programs, malaria prevention became a new priority under the administration of US President Obama. While treatments for HIV/AIDS require large start-up and continuous costs, sprayed bed nets for malaria prevention can be marketed as a simple and inexpensive solution to a crisis (Lynch, 2011, p. 333). Such politically motivated, sudden priority shifts may leave FBDOs in serious financial difficulty.

### Need To Constantly Prove Themselves

To work with international donors, FBDOs must recognize that they constantly need to prove their compliance, credibility and worthiness and need to adapt to donor requirements. This requirement of proving themselves has a twofold impact. First, FBDOs need to prioritize programs and actions which demonstrate accountability, efficiency, sustainability, and transparency (Lynch, 2011, pp. 194-195).

Transparency is crucial. FBDOs need to respond to the same quality criteria as any other actor and not expect to be treated as a separate or special category (Karam, 2014. p. 4). Currently, some practices of engagement with FBDOs or local faith actors appear to be poorly developed, disseminated, and documented (Ager, 2018, p. 1).

However, such transparency comes with a cost to comply with donor requirements. Some German donors demand the payment of interest penalties if requested funds cannot be utilized in the projects within four months. While this demand certainly makes sense in a German context, it causes undue hardship and bureaucracy in highly fragile development contexts, Often, FBDOs lack skilled personnel, particularly in contexts of poverty, low literacy rates, and remuneration levels to deal with the multiple donor requirements (James, 2011, p. 111).

Second, institutional donors engage mainly with large global FBDOs and require these FBDO partners to accept secular terms (Grills, 2009, p. 517). Large, global FBDOs are often preferred partners for cooperation due their ability to express their programs in terms of activities, impacts,

and outcomes, using the language of project models and descriptions which are familiar to institutional donors.

## Fear of Evangelization and Proselytism

FBDOs need to be aware that there is a strong fear on the part of international donors of evangelization and proselytism (Fountain, 2015, p. 80). FBDOs unfortunately are viewed by institutional donors and the academic world as doing something quite unacceptable in mixing development and religion. Thus, a clear separation between religion and development is considered imperative. The Australian Council for International Development (ACFID), the umbrella body for Australian NGOs, for example, states in its Accreditation Guidance Manual that religious activities as supporting or promoting a particular religion, including activities undertaken with the intention of converting individuals or groups from one faith and/or denomination to another, are not to be countenanced (DFAT, 2018, p. 39).

Such strict separation of development and religion, however, cannot be easily practiced. The Code of Conduct for the International Red Cross attempts to de-link the spread of religious opinions from humanitarian actions. It disallows the use of aid to "further" a religious standpoint but grants humanitarian agencies the ability to "espouse" religious positions in agreement with the Universal Declaration of Human Rights (Fountain, 2015, p. 82). The difference between "further" and "espouse" a religious position is entirely unclear. In contrast, what is broadly accepted is that coercive "conversion," tying of humanitarian aid to the beneficiary's religious beliefs or utilizing aid as a tool to manipulate changes in the recipients' religious adherence, is not acceptable. Not only institutional donors, but also recipients of humanitarian aid have widespread concerns that religious communities seek to take advantage of crises as opportunities for proselytizing fragile communities (Ager, 2018, p. 4).

Having recognized this concern, the World Council of Churches, the Catholic Church, and the World Evangelical Alliance promulgated a set of recommendations on how to conduct Christian witness in a multi-religious world (WCC, PCFID & WEA, 2011). Christians are called to fulfil Christ's commission in an appropriate manner, particularly within interreligious contexts of development work. They are called to act justly, to love tenderly (cf. Micah 6:8), to serve others and in so doing to recognize Christ in the least of their sisters and brothers (cf. Matthew 25:45). Development work providing education, health care, relief services and advocacy is an integral part of witnessing to the gospel. But such witness should never lead to an exploitation of situations of poverty and need, which has no place in Christian outreach. Christians should denounce and refrain from offering all forms of allurements, including financial incentives and rewards, in their acts of service.

Most FBDOs (appropriately) follow these recommendations and proscribe faith and evangelization to avoid any appearance of coercion (Ager, 2011, pp. 464-465). World Vision, for example, emphatically argues that proselytizing is a contravention of its policy and humanitarian codes of conduct (Schafer, 2010, p. 125). In fact, they serve everyone they can carefully within cultural contexts to build respectful interfaith relationships. Such work within cultural contexts, especially in adversarial ones, is crucially important in order not to jeopardize fellow aid agencies' operations and staff or to risk the lives of beneficiaries (Thaut, 2009, p. 325).

## Downplay of Spiritual Identity

To avoid even the perception of evangelization and proselytism, FBDO may downplay their spiritual identity. This downplay can result from the positive intention of building communities or from a fear of donor repercussions. For example, Islamic palliative clinics deliberately downplay their religious identity to provide care and support to all patients. The commitment and sincerity of the volunteers have succeeded in providing much legitimacy to and patronage of these clinics (Santhosh, 2015, p. 95).

On the one hand, some FBDOs themselves prefer to keep their faith identity vague and ambiguous. They tend to underemphasize their faith to appeal to the widest possible funding base, to recruit and retain a diverse staff team, and to work easily in a variety of faith contexts (James 2011, p. 115). As mentioned above, World Vision's CoH lays aside traditional development boundaries regarding notions of religious/secular and public/private. However, in formal communications about this program, components of spiritual capital are often downplayed. World Vision staff frequently stress that the program does not aim to change a participant's faith or to introduce new theologies or faith perspectives.

On the other hand, World Vision and FBDOs in general need to think through the message which they indirectly convey by downplaying their spiritual identity. The consequences in the case of the CoH program are clear: a) World Vision obscures how compelling the spiritual component of CoH curriculum is for the personal and spiritual development of its participants. b) It affects World Vision's own programming and evaluation c) World Vision (unintentionally) contributes to the continuing dominance of the religious/secular binary (Bartelink et al., 2020, p. 52).

## 4. RECOMMENDATIONS

One of the daunting challenges for any FBDO is to maintain a healthy balance of projects in the proposal, implementation, and closing stage funded by different sources. To give an example for this complexity, World Vision Germany's project portfolio in 2020 consisted of 87 Regional Development Projects, 94 Private Funded Projects, and 89 Public funded projects in various stages of the project pipeline (World Vision Germany, 2020).

Consequently, this paper argues that FBDOs need to have a "right-sized," contextualized faith to cooperate effectively with institutional donors. To achieve this goal, they need to undertake a deliberate and careful analysis [is crucial], taking into consideration of a) the socio-political country context, b) funding streams and donor priorities, and c) the importance and expression of faith in the FBDO's organization, programs, and staff. We give the following recommendations of how they might achieve this.

### 4.1 "Right-sized," Contextualized Development Programs

Frequently, new opportunities are coming up concerning a wide variety of projects at different countries financed by various donors.

First, FBDO may want to prepare a list of focus countries to decide which countries and consequently which project opportunities are to be prioritized. For this analysis, it is crucial to assess whether the FBDO has built up over time in the focus countries deep community engagement, extensive networks, holistic project models and profound levels of beneficiaries and communities' trust.

Second, all FBDO have limited technical capabilities and therefore need to assess whether the required technical expertise fits the focus country's context. A mental health project needs access to trained and experienced counselors, while shelter projects require civil engineering and procurement skills. FBDOs need to remember that technical expertise contributes much more to the relationship between donors and FBDOs than questions of faith (van Wees, 2021, p. 486).

Third, the FBDO may want to consider the social-economic and religious context of a focus country. As described previously, World Vision's Channel of Hope (CoH) programs which incorporate explicit religious messages have been implemented successfully to address a wide variety of topics such as early child marriage or female genital mutilation. CoH programs seem to resonate especially well when the beneficiaries have a shared religious background. In contrast, in a country will a predominant atheistic context the same religious messages could be easily misunderstood as an attempt to proselytize the beneficiaries.

## 4.2  "Right-sized" Funding

Different funding streams imply different levels of funding size, financial reporting requirements and program restrictions. At one side of the spectrum, child sponsorship funding is comprised of tens of thousands of small donations (about EUR 30 each), which are mostly unrestricted, and demand limited financial reporting work. At the other end, public grants for multi-country, multi-partner consortium grants can reach EUR 10 million and consequently require highly sophisticated financial reporting structures and can only be utilized for very narrowly defined and approved project scopes.

Fourth, FBDOs may consider what kind of funding streams are available for their focus countries and carefully weigh the pros and cons of pursuing large public grants. If a FBDO wants to pursue large grants, it must ensure that the required organizational, technical and staff capabilities are developed, maintained, and enhanced.  In the past, some FBDOs could not resist the temptation of grabbing large grants without sufficient preparation, which caused serious repercussions. For example, selected Cameroonian FBDOs who received large sums of debt relief funding have a very poor reputation today due to claims that they abused funds (Wees at al., 2020, p. 470).

Fifth, FBDO may be advised to seek a balanced funding stream and to not simply refuse to engage with public donors just because of fear of being instrumentalized. Turner Haynes (2021, p. 4) highlighted in a recent study that the percentage of USAID competitive grant funding to FBDOs dropped from 14.2% in 2005 to just 7.7% in 2018.  These findings suggest that FBDOs appear to be too overcautious and suspicious in accepting USAID funds.

## 4.3  "Right-sized" Faith

The unique faith inspired impact of FBDOs depends on how successfully they can integrate faith and development: "faith identity feeds development interventions, which in turn feed back into the perceived faith identity" (Jennings, 2021, p. 73). Finding "right-sized" faith remains one of the most crucial challenges for any FBDO. Historically, we have seen FBDOs evolve into secular NGOs. The converse never occurs. Examples of this are Oxfam and Save the Children, all founded by religious leaders (Ware 2016, p. 5).

Six, FBDOs are advised to have a clear notion of their faith identity, spiritual capital, and pursue their religious convictions with boldness and humility. Faith can "provide fuel for development" offering a viable alternative to secular development theory through a) solid spiritual teachings, b) transcendental power such as prayer and c) conveying a message of hope, meaning, and purpose (James, 2011, pp. 113-114). World Vision seeks life in all its fullness for every child and admits the need of prayer for every heart to make it so as summarized in its vision statement (World Vision, 2022). Prayer motivates many staff members to continue serving in a variety of functions to contribute to children's physical, emotional, relational, social, and spiritual wellbeing.

"Right-sized" faith requires humility to recognize when witness to Christ can only be done by FBDOs through acts of compassion and when religious activities in word and deed are possible such as conducting CoH programs in many African countries.

Seventh, FBDOs are uniquely positioned to encourage cooperation and unity among various religions, as well as among church leaders to overcome denominational differences by focusing on overarching humanitarian development goals (Aiken, 2010, p. 9). Reconciliation and peace building is central to many religions and are desperately needed in the world today (James, 2011, p. 113).

## 5.  CONCLUSIONS

This paper has demonstrated that "right-sized," contextualized faith can empower FBDOs to build on, explore, and utilize unique strengths as they make a distinctive contribution to cooperate with institutional donors regarding development work. FBDOs' extensive networks foster long term

community engagement at multiple levels. Holistic programs not only address immediate physical or social concerns but also aim to engage beneficiaries' deepest spiritual needs. Such holistic approaches can only be effective if strong levels of trust have been formed over time and FBDOs are not afraid to utilize their spiritual capital wisely. In dealing with international donors, FBDOs need to be aware of the challenges they face. The possibility of instrumentalization cannot be underestimated. In working with international donors, FBDOs need to prove themselves and achieve greater transparency of programs by using donor conform monitoring and evaluation tools. Fear of proselytism is the most distinctive donor reservation in working together with FBDOs. It is important that FBDOs maintain a clear spiritual identity without, however, imposing their views on others. FBDOs are best seen as "brokers of development" in the sense of "intermediaries" who take advantage of and play a key role in their position at the interface between the religion–development–humanitarian domain. As brokers of development, they are deeply rooted in and intimately familiar with the needs of local communities while at the same time mastering donor engagement with its specific requirements and demands (Tomlin, 2020. pp. 332-333). FBDOs can navigate between faith and secular spaces (King, 2019, p. 155) and switch between public and local faith community engagement (Tomalin et al., 2020. p. 169). Their challenge is to establish a "right-sized, contextualized faith as they work effectively with international donors.

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# Faith and Management at Theological Seminaries

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## Abstract

Leadership for theological training institutions has been subject to the influences of the academization of the organizations and a concurrent professionalization of the leader's role. The doctoral thesis "Leading evangelical seminaries in German-speaking Europe: A transcendental phenomenology" (Schroder, 2016) is an empirical phenomenology among lead administrators of protestant seminaries in the free-church context. It describes the participants' experiences in their lived phenomenon of leadership within the theoretical frameworks of spiritual leadership, servant leadership, and workplace spirituality. Six lead administrators voice their experiences regarding their management responsibilities and their spirituality. This article will summarize the study while focusing on findings and themes on issues of faith and management. As the most profound theme emerged the leader's spirituality as the primary source of motivation and meaning for the tasks and experiences contained within their leadership role.

Keywords: Spiritual Leadership, Servant Leadership, Workplace Spirituality, Theological Education, Phenomenology.

## 1. INTRODUCTION

"What does it mean to be you?", that is the guiding question for my doctoral thesis "Leading evangelical seminaries in German-speaking Europe: A transcendental phenomenology" (Schroder, 2016). It is an empirical phenomenology among lead administrators of seminaries in the protestant free-church context. The study's result is the essence of the experience as described by the participants in their lived phenomenon of leadership within the theoretical frameworks of spiritual leadership, servant leadership, and workplace spirituality. For reasons of access, personal familiarity, and necessary delimitation (Creswell, 2013) only theological institutions were considered that also were part of the Konferenz Bibeltreuer Ausbildungsstätten (KbA, 2014). Portions of this thesis have been already published elsewhere focussing on findings concerning the experience of diversity (Schroder & Milacci, 2017).

### 1.1 Definitions

Academization is the process where organizations become recognized as academic institutions; furthermore, its programs become academically accredited as well. This state of recognition, once achieved, must be maintained through ongoing quality management and periodical reaccreditations (Ott, 2013).

Professionalization in educational leadership is described as a leader's increasing managerial responsibility of a chief executive (Bezboruah, 2011). This is usually the result of a more structured and defined organization of the training institution (Ott, 2013).

The term lead administrator generally defines the person who assumes the highest hierarchical position within the executive structure of the organization. The lead administrator, for my purposes, was the person positioned at the top of the institution where governance, leadership, and management converge.

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For this article, seminary describes an institution that provides formal theological training through an academic program format leading to recognized degrees or their equivalents. This nomenclature also conforms to the terminology employed in related literature (e. g. Ott, 2011).

The result of a transcendental phenomenology is a description of the essence of a lived experience. This term is derived from the Greek ousia, meaning the true being of a thing, "what makes a thing what it is (and without which it would not be what it is)" (van Manen, 1990, p. 177).

### 1.2 Purpose Statement
The purpose of this study was to understand leadership through the description of the lived experience of lead administrators, investigated using the empirical philosophy of transcendental phenomenology (Jackson & Parry, 2011; Moustakas, 1994; Husserl, 2012). However, this investigation was not a study of the leaders themselves, but the essence of their experience (Creswell, 2013). The significance of this study for this article lies in the deeper understanding and practical application of the theoretical frameworks of spiritual leadership (Fry, 2003), servant leadership (Greenleaf,2002), and workplace spirituality (Giacalone & Jurkiewicz, 2010) for lead administrators in spiritually focused and religious institutions.

### 1.3 Research Questions
Five research questions guided the interview process and informed the coding analysis (Seidman, 2013; Saldaña, 2016). (1) How do participants describe what it means to be a lead administrator in their context? (2) What are the roles the participants identify as pertaining to their position? (3) How do participants describe their path of leadership development? (4) What influences on the participants' present experiences, attitudes, and behaviours do they identify? (5) What role does personal spirituality play in the participants' decision for leadership and their continued work as leaders?

## 2. LITERATURE
In transcendental phenomenology, the literature serves a two-fold purpose. First, it describes the phenomenon and outlines the expectation of what new knowledge might be obtained (Moustakas, 1994). Second, it establishes the body of information that needs to be bracketed out throughout the study as to let the participants' descriptions dominate the analysis of the phenomenon (Husserl, 2012; Moustakas, 1994). The situation of theological education puts leaders in a position where theories of spiritual, servant leadership (Jones & Mason, 2010; Ott, 2013) and workplace spirituality as a subcategory of spiritual leadership apply.

### 2.1 Developments in Theological Education
The educational sector, in which the participants operate, is changing on a global scale (Ott, 2013; Steinke, 2011; Stortz, 2011; Werner, 2011). Reinalda and Kulesza (2006) observed these global shifts to include: (a) an increase of economic competitiveness in the market; (b) increasing types of adult learning; (c) the emergence of non-university institutions and programs; (d) proliferating online and distance learning; (e) innovations in collaborations between public and private entities; (f) influx of business management practices; and (g) the establishment of new private universities. Several European countries promoted these shifts by initiating the Bologna Process (European Ministers of Education, 1999).

Ott (2013) identified specific challenges for theological institutions in market orientation, the Bologna Process in Europe, and the educational needs of the global church, which are fuelled by the shift of educational structures from policy and management-oriented models to market-based and entrepreneurial models. Seminary leaders consequently face issues of quality-management, evaluation, accreditation, and other management processes (Ott, 2013).

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## 2.2 Workplace Spirituality Theory

Workplace spirituality (WS)can be defined as "aspects of the workplace, either in the individual, the group, or the organization, that promote individual feelings of satisfaction through transcendence" (Giacalone & Jurkiewicz, 2010, p. 13). The awareness of spirituality at the workplace arose in response to a felt void at work (Avolio et al., 2009) caused by shifting values, an increase of social autonomy, and a renewed search for meaning (Giacalone & Jurkiewicz, 2010). Subsequently WS programs are being implemented to create sustainable business models (Fry & Nisiewicz, 2013) and employers develop strategies on faith at work (Alewell & Moll, 2021).

WS has been studied by both researchers and practitioners (Giacalone & Jurkiewicz, 2010). It was investigated in conjunction with servant leadership (Bowden et al., 2010), workplace integration (Goldstein-Gidoni & Zaidman, 2011), occupational stress (Zellars et al., 2010), organizational commitment (Arménio & Miguel Pina, 2008), work-related learning (Dirkx, 2013), work effectiveness (Bowden et al., 2010), and organizational ethics (McGhee, 2021).

## 2.3 Spiritual Leadership Theory

Much writing on spiritual leadership refers to the theoretical groundwork by Fairholm, and by Fry and his associates in developing Spiritual Leadership Theory (SLT, Fairholm, 2009; Fry, 2003). This section focuses on Fry et al.'s work. Fry (2003) defined spiritual leadership "as comprising the values, attitudes, and behaviours that are necessary to intrinsically motivate one's self and others so that they have a sense of spiritual survival through calling and membership" (p. 711).

SLT applies to leaders, followers, entire organizations, and organizational transformation (Fry et al., 2007; Fry & Nisiewicz, 2013). In this broad applicability, Fry (2003) developed a theory based on a personal sense of calling, altruistic love as organizational culture, and genuine care, concern, and appreciative interest in self and others (see also Figure 1). The key processes of SLT include creating a vision in which followers and leaders find their calling, and establishing an organizational culture based on altruistic love where everyone experiences membership (Fry & Nisiewicz, 2013). SLT focuses on integrating mind, body and spirit, or home, community, and self to become a more productive leader.

In the framework of SLT (Fry, 2003), effort is expressed in hope/faith and works and includes aspects of endurance and perseverance, a willingness to do what it takes, and an expectation of victory or success. According to Fry (2003, p. 713), "faith is more than hope … it is the conviction that a thing unproved by physical evidence is true … it is based on values, attitudes, and behaviours that demonstrate absolute certainty." "Hope", he continued, "is a desire with expectation of fulfilment."



FIGURE 1: Causal Model of Spiritual Leadership (Fry, 2003, p. 695). Reproduced with permission.

The construct of reward is defined by altruistic love and includes aspects of forgiveness, kindness, integrity, honesty, patience, courage, compassion, loyalty, trust, humility, and empathy.

It is "a sense of wholeness, harmony, and well-being produced through care, concern, and appreciation for both self and others" (Fry, 2003, p. 712).

Fry (2003) defined calling as "a vision of life's purpose and meaning" (p. 706). The term has long been used as a defining characteristic of a professional. People with a strong sense of calling believe in the value of their profession (Fry, 2003).

Membership is defined as belonging to "a community where one is understood and appreciated" (Fry, 2003, p. 706). Membership includes the cultural and social structures through which people seek to be understood and to be appreciated. Through a culture of altruistic love and a vision that gives meaning to a person's calling, spiritual leadership provides the individual with a sense of belonging that leads to spiritual well-being (Fry & Nisiewicz, 2013).

The result of SLT is an increased organizational commitment, where "people with a sense of calling and membership will become attached, loyal to, and want to stay in organizations that have cultures based on the values", and increased productivity where "people who have hope/faith in the organization's vision and who experience calling and membership will 'do what it takes' in pursuit of the vision to continuously improve and be more productive" (Fry, 2003, p. 714).

2.4 Servant Leadership Theory

This theoretical treatment of servant leadership (SL) is based on the work of Robert K. Greenleaf (2002). His theory follows the assumption that every person has a natural tendency to serve. According to Greenleaf (2002),_if leaders understand themselves as servants, their followers will potentially become "healthier, wiser, freer, more autonomous, and more likely themselves to become servants" (Chapter 1, Pos. 346). SL "is in essence, a way of being" (Spears, 2010, p. 13). The two most important elements are an outward focus, evidenced in genuine concern with serving those who follow, and the self-concept of the leader as being the first among equals (Dierendonck & Patterson, 2010) as they lead through servant power (Bloksberg, 2021). Greenleaf (2002) himself identified nine characteristics of SL (see Figure 2).

Servant leaders practice active listening because they seek to understand the needs of others. They, however, not only seek to know, but also show empathy towards the feelings of others to foster emotional and spiritual wholeness and healing, while maintaining awareness of one another's values, feelings, strengths, and weaknesses (Ingram, 2003). Greenleaf (2002) explained that through conscience, servant leaders transform their passion into compassion, which in turn becomes one of the foundations of their moral authority. This requires leaders to accept the persons under their leadership without qualification.

Servant leaders lead by positive influence and respectfully communicated persuasion (Ingram,2003). In the construct of persuasion, all previous concepts are combined to establish the moral authority of the leader who does not have to rely on position and power to lead. The leader rather exercises leadership because he or she has proved to be trustworthy.

When planning, the servant leader, through conceptualization, can integrate present realities with future possibilities (Ingram, 2003). The leader intuitively makes judgments and decisions without having all the information but has a sense of the unknowable and unforeseeable (Greenleaf, 2002). Related to conceptualization is the construct of foresight, which Greenleaf defined as, "a better than average guess about what is going to happen when in the future" (Chapter 1, Pos. 468).

Servant leaders' stewardship gives them a sense of responsibility for the people and organizations entrusted to them. They exhibit commitment towards service and the fostering of spiritual, professional, and personal growth within everyone in the organization (Ingram, 2003).

Greenleaf (2002) regarded the principle of stewardship as the measure of leadership excellence. In essence, Greenleaf's servant leadership theory redefined leadership as service and stewardship.

Studies on SL often carry Judeo-Christian overtones, but Sendjaya (2010) observed it has also found support from other religious and non-religious frameworks. Langh of and Güldenberg (2020) reviewed the literature on SL and found that narcissism impedes SL, an altruistic mindset leads to SL, emotional intelligence is positively related to SL and that core-self-evaluation is an antecedent to SL.

Wheeler (2012), in his comprehensive application of SL to higher education, made the argument that other styles of leadership currently present in these institutions are not sustainable. His premise includes cornerstones of "a call to serve, authenticity, humility, moral courage, and healing one's own emotional state" (p. XVI).
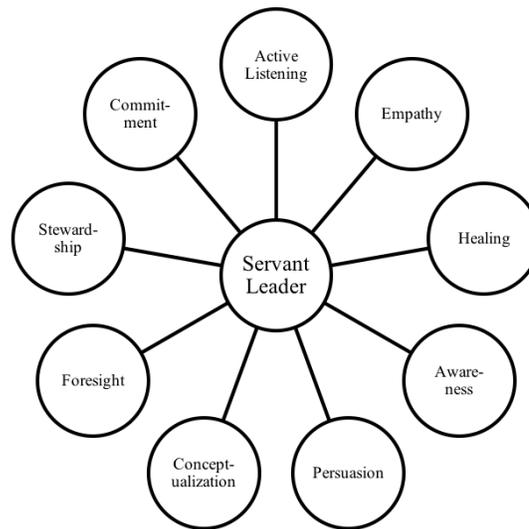


FIGURE 2: Servant Leadership Characteristics.

The theory of SL has been related to the leadership of institutions for theological training (e.g., Ott, 2013). Kessler (2022) illustrated SL as the inversion of the commonly held pyramid of power with the leader on top. Building on the writings of Greenleaf, he distilled nine facets of SL for the Christian context including among others (a) servants leading others to autonomy; (b) servants' gift of leadership is the gift of service; (c) people voluntarily follow gifted servant leaders; (d) servant leaders can lead themselves; and (e) servant leaders are open to critique. Kessler concludes that the servant leader in the Christian arena first and foremost serves God.

## 3. METHODS

This study sought to arrive at essential descriptions of the phenomenon of leadership following a transcendental phenomenological design. This design is scientific (Willard, 1984), concerned with the appearance of things (Heidegger, 1962), philosophical (Creswell, 2013), and a search for the essence of things (Husserl, 2012).

### 3.1 The Philosophy of Transcendental Phenomenology

Transcendental phenomenology is a philosophical method that goes "to the things or matters themselves" (Husserl, 2012, p. 328). It follows the assumptions that knowledge is most ascertainable through the experience of others (Willard, 1984), and that experience and behaviour are inseparable (Moustakas, 1994).

Transcendental phenomenology emphasizes intuition, imagination, universal structures. The analytical process includes epoche, phenomenological reduction, and imaginative variation (Husserl, 2012; Moustakas, 1994). Transcendence in this context is the capacity of the mind to cognitively grasp objects that exist independent of them in all their aspects (Willard, 1984).

Husserl argued for the objectivity of knowledge through subjective knowing, which rests on three a priori assumptions: (a) inter subjectivity – a community of knowledge is possible in that many subjects can know the same thing in the same way; (b) intentionality – all acts of thinking are governed by certain laws that regulate the relationship between thoughts and things; and (c) intuition – the fact that transcendent objects can be known through repeated cognitive acts and thus enter into a relationship with the essence of the object (Willard 1984, pp. 248-249). In diverting from Husserl's ideal of pure knowledge of the essence of phenomena (Husserl, 2012), this study assumed the humbler goal to describe it "to a certain degree of depth and richness" (van Manen, 1990, p. 11).

### 3.2 The Practice of Transcendental Phenomenology

Transcendental phenomenological inquiry is a structured and rigorous approach, a descriptive science, or "the first method of knowledge because it begins with 'things themselves'" (Moustakas, 1994, p. 41, emphasis in original), in search of the essences of phenomena. Transcendental phenomenology relies on sensory data and intuition, and thus perception and intention constitute the media of obtaining pure descriptive knowledge through pure reflection (Husserl, 2012).

"Our first outlook upon life … [is] imaging, judging, willing, 'from the natural standpoint'" (Husserl, 2012, p. 50). To make sense of the natural world from this standpoint, the researcher needs to assume a stance of 'cogito'; i.e., establishing meaning by assuming a standpoint of being consciously aware of the natural world. Investigations from the natural standpoint can, therefore, never describe the meaning of things, but only portions of their appearance. To provide descriptions of essential meaning (Moustakas 1994), the researcher must leave the natural standpoint through bracketing or epoche, and phenomenological reduction.

The Greek term epoche has been interpreted to mean, "to hold back" (Moustakas, 1994, p. 9). Epoche requires the researcher to lay aside as much as possible the natural attitude towards things comprised of personal biases, prior knowledge, and personal presuppositions, to enable "a new way of looking at things" (Moustakas, 1994, p. 33). Through epoche, the researcher doubts the natural attitude as a source of truth, (Dowling, 2007) and brackets it out (Moustakas, 1994). This means to refrain from judgment based on it (Husserl, 2012, p. 57). This refraining acts in two dimensions: (a) towards the theories and doctrines of the natural sciences, and (b) towards the researcher's own prejudices (Moustakas, 1994).

The transcendental phenomenological process of inquiry is comprised of two distinct phases. First, the researcher obtains textural descriptions of the shared lived experience (Heidegger, 1962) to describe things as they appear (Dowling, 2007). In the second phase, the researcher engages in a reflective analysis and interpretation of the data to arrive at a description of the structures and meaning of the participants' lived experiences (Moustakas, 1994).

### 3.3 Research Design

Knowledge is most accessibly found "in the experiences of those doing the actual knowing" (Willard, 1984, p. 25), thus the investigation was centred on capturing and qualitatively describing the lived experiences of the participants following the approach of transcendental phenomenology (Husserl, 2012; Moustakas, 1994).

Participants included six lead-administrators, from a population of 17 seminaries of the KbA that fit the delimitation of accredited programming at the time the study was conducted. Data was gathered through a questionnaire, three in-depth interviews, and personal observations. The questionnaire was an adaptation of the Spirituality at Work Questionnaire (SWQ; Ashmos & Duchon, 2000), the Spiritual Leadership Questionnaire (SLT; Fry et al., 2005), and the Servant Leadership Questionnaire (SLQ, Ingram, 2003), which were consolidated into one, and translated into German.

The interviews followed Seidman's (2013) three-phase approach to phenomenological interviewing. The first two phases had a semi-structured form (Patton, 2002). The final phase was the least structured allowing the participants to formulate for themselves the meaning of their lived experience (Patton, 2002; Seidman, 2013). Phase one focused on the historical context, phase two on the influencing context, and phase three on making sense of the experience (Seidman, 2013).

Observations concerned the participants' living-out or their role as lead-administrators in a public or private setting. I assumed the position of a non-participant observer who remained an outsider to the activity of the leader under study (Creswell, 2013). When avoiding ethnographic participation, transcripts of ethnographic field notes at best are raw data products of the researcher's observations (Emerson et. al, 1995).

The purpose of the phenomenological analysis is "to grasp and elucidate the meaning, structure, and essence of the lived experience of a phenomenon for a person or a group of people" (Patton, 2002, p. 482). The analysis process was accompanied by a continuous application of epoche (Patton, 2002). All text-based, data including interview transcriptions, field notes, public documents, and memos were entered into the computer program MAXQDA 11 for phenomenological text analysis and coding (Saldaña, 2016).

Following Husserl's (2012) axiom "to the things themselves" (p. 328), the participants' descriptions were the main source for describing the essence of their shared experience (Patton, 2002). Through horizontalization the first coding cycle identified significant statements on how the participants experienced the phenomenon, developing a list of non-repetitive statements of equal value (Creswell, 2013; Saldaña, 2016). The second coding cycle organized these statements into meaning units, which in turn were categorized into common themes (Moustakas, 1994; Saldaña, 2016; van Manen, 1990).

From the meaning units and themes, textural descriptions were developed outlining what the participants have experienced with the phenomenon (Creswell, 2013; Moustakas, 1994). Then, in reflection on textural description, structural descriptions were developed outlining how the experience happened (Moustakas, 1994). The structural description constitutes a report of the researcher's reconstruction of the participant's experiences with the phenomenon (Moustakas, 1994).

The final analysis involved the integration of textural and structural descriptions to develop a representation of the meaning and essence of the experienced phenomenon (Creswell, 2013; Moustakas, 1994). The essential or synthesis description is the result of an intuitive and reflective integration of the textural and structural descriptions and constitutes a description of the meaning and essence of the participants' shared experience with the phenomenon (Moustakas, 1994). It is the most transcendent description of the essence as it reduces the experience to its most universal basic form (Husserl, 2012). A synthesis description is the "culminating aspect of a phenomenological study" (Creswell, 2013, p. 194).

## 4. FINDINGS

The participants' textural descriptions, the "what" of their experiences as leaders, included themes of spiritual, collaborative, professional, and academic leadership aspects. Structural themes described the "how" of lived experiences and included the experience of leadership as a responsibility, as something negative and positive, and as a spiritual calling. The essential descriptions were divided into essential experiences of spirituality, significance, meaning, and relationship, and essential influences of professionalization, academization, and diversification. For this article, the essential experiences provided the framework for the discussion of the findings.

### 4.1 A Holistic Integration of Personal Spirituality

The most visible essential aspect to the participants' experience of the phenomenon of leading seminaries in the protestant free-church context is the holistic integration of their spirituality into every aspect of their lives. Like an umbrella, this theme includes all subsequent themes.

Faith is connected to their personal development and identity as leaders, their understanding of calling, their leadership style and values, their leadership practice, the relationships they build and maintain, their vision and passion for life and ministry, and their private and organizational decision-making processes. The participants are spiritual people and want to be perceived as such, even in their professional and academic leadership capacities.

The participants defined their spirituality through a personal relationship with the God of the Bible. This relationship is built and maintained primarily through the study of the Scriptures, a prayer life, and living in a Christian community. One leader said that his sense of significance comes from the knowledge, that "what I do has meaning […] for the kingdom of God" (Schroder, 2016, p. 168).Spirituality is their primary source of meaning, motivation, and identity. From it flows a sense of spiritual calling, spiritual responsibility, and their values.

### 4.2 Leading With a Sense of Spiritual Calling

The participants shared a common understanding of their current occupation as the result, or fulfilment, of their spiritual calling. Each leader, however, provided a unique perspective on how they perceived and articulated their calling.

In a general sense the concept refers to the reality of being called into a relationship with God. In a more focused sense, all participants agreed that the relationship with God was the foundation for their specific calling or commission to the full-time ministry. This calling is also experienced as a spiritual reality, and it is expressed through their leadership in the context of theological education or ministry training. At their seminaries, participants exercise their calling with a sense of accountability to the one who called them, and with the expectation of his guidance.

Being called provides for the participants a sense of meaning, motivation, inner peace, and personal vision, but also a sense of responsibility. Amidst the changes that leaders experience in their role, the question of calling becomes an important factor for motivation and focus. One participant asserted, "I am called to be here, even if it is hard at times." (Schroder 2016, p. 203).

### 4.3 Spiritual Leadership That Flows Out of Spiritual Responsibility

Each participant described himself as a spiritual leader. The participants see spiritual leadership as guiding all they do and defining how they experience their role. They identified strongly with personal faith and spiritual values, which translate into practical and spiritual values and the integration of spirituality into their leadership practice. One leader expressed this notion perhaps the clearest, "I could not separate leadership and management tasks from the pastoral dimension. For me, that belongs together." (Schroeder 2016, p. 225) As spiritual leaders, the participants assume responsibility for the mission of the school, the spiritual atmosphere at the institutions, and the spiritual formation of the students. From their sense of spiritual responsibility

also flowed the desire to lead in the community of a team of spiritual leaders, and to do so with spiritual values.

### 4.4 Spiritual Values That Flow Out of Personal Spirituality and Life-Experience

An essential aspect of the participants' experience is their focus on values. These leadership values have a spiritual origin as they influence the lead-administrators practice and their expectations towards their teams. These values also influence the corporate culture of their respective seminaries.

Each lead administrator felt the need to promote a spiritual Christian community within their organizations. They attempted this by implementing spiritually formational elements into institutional life on student, staff, faculty, and leadership levels, but also by leading a spiritual life as an example themselves.

Predominant values included trust and freedom. Trust is the foundational attitude that finds expression in giving or experiencing freedom. One leader descried his responsibility, "to help people to develop, to set free their potential, to flourish, to get ahead […] to find joy" (Schroder, 2016, p. 169).This freedom to act, to develop, to try out, and to operate self-responsibly and autonomously needs in turn to be acted out faithfully to not betray the trust that was extended. The lead administrators described this circularity in the contexts of their development and their current leadership. While growing as leaders, they were the recipients of trust and freedom. As leaders today they continue to experience the same from stakeholders and supervisory boards, but now they also extend trust and freedom to others while expecting the recipients to act with integrity.

## 5. DISCUSSION

This section discusses the findings of this study as they relat to the theoretical framework that was applied. The participants filled out a questionnaire that combined questionnaires for each theory applied in the study. All questions were answered on a five-point Likert response scale (1 = strongly disagree, 2 = disagree, 3 = neutral, 4 = agree, 5 = strongly agree).

### 5.1 Concerning Spirituality at the Workplace

To describe the participants from the perspective of WS the Spirituality at Work Questionnaire (SWQ, Ashmos & Duchon, 2000) was adapted. Among the three questionnaires, the SWQ (Ashmos & Duchon, 2000) received the highest average scores (M = 4.4, Mdn = 4.5, SD = 0.25, see Figure 3). Moreover, all constructs of the theory were reflected in the findings (further detailed in Schroder, 2016).

The structural theme of experiencing leadership as a responsibility relates to the corresponding construct of responsibility. Each participant described an acute sense of responsibility. The details on what constituted this responsibility ranged from internal to external sources, from role-related to spiritually connected associations, and from personal expectations of self to feeling a responsibility for larger groups of people or institutions.

Inner life and contemplation describe spirituality as identity or being on a journey. These variables are reflected in several textural, structural, and essential themes related to spirituality. The variables of connection and community describe the inner drive for relationships. The study found that participants lead collaboratively, experience stress due to failed relationships, and see relationships as essential to their experience. Each also described the positive influence of family as central to their experience.

The variable of meaning is primarily described in the participants' essential experience of significance and meaning, which is connected to their spiritually motivated leadership. A sense of

being called, family relationships, and a sense of the significance of their role are their main motivational sources.
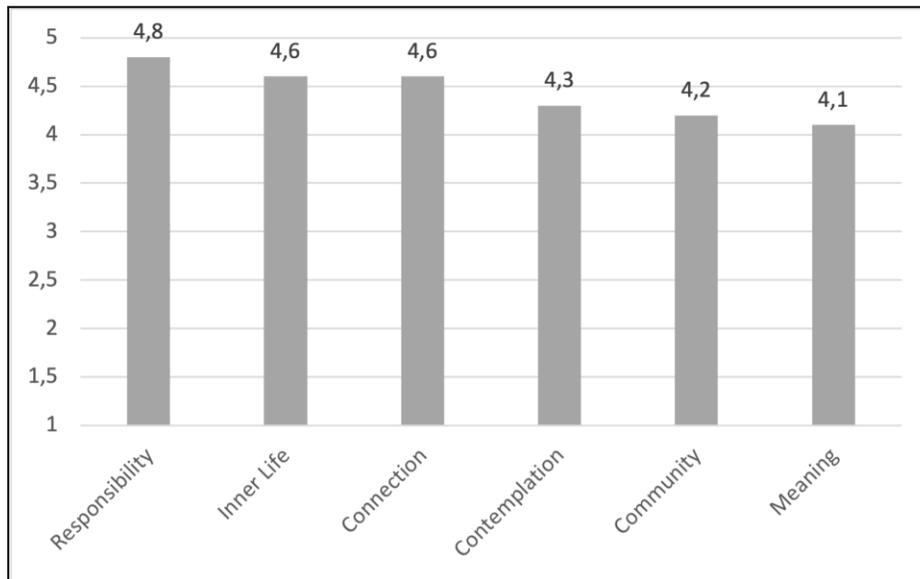


FIGURE 3: Mean Scores of the Spirituality at Work Questionnaire (SWQ).

## 5.2 Concerning Spiritual Leadership Theory

The SLT received the second-highest average score among the three questionnaires. As a general statement, the participants can be described as spiritual leaders in the sense of the SLT framework (Fry, 2003; 2013). The variables love, membership, calling, inner life, commitment, and satisfaction all scored higher than the total mean (M = 4.1,Mdn = 4.1 SD = 0.75, see Figure 4). These variables are positively describing the spiritual leadership of the participants.

During the interviews, all participants spoke about love. The word was used 34 times altogether. Membership is primarily expressed in a sense of being understood and appreciated. Four participants spoke directly about feeling appreciated and appreciating others within the organization. Several phenomenological themes in the findings are also based on community and relationship (see Schroeder, 2016, for further detail).

The issue of being called and fulfilling that calling through the organization is essential to the experience of the participants. For each participant personal faith and a sense of spiritual calling were foundational aspects in general. They were important guiding factors for their career choices and further development as leaders. The sense of being called to what they do continues to have a significant impact on the participants' current experiences.

The variable of inner life is again reflected in the textural, structural, and essential themes related to personal spirituality. The structural theme of experiencing leadership as a responsibility, and the essential subtheme of spiritual leadership that flows out of spiritual responsibility describe how the participants related to the variable of commitment. Participants expressed their satisfaction through experiencing their role as meaningful and positive.

The variables of vision and hope/faith scored lower than the total mean. These two variables seem to diminish the spiritual leadership of the participants. However, I found that the low scores in these two areas are not reflective of the participants' leadership practice and experience.
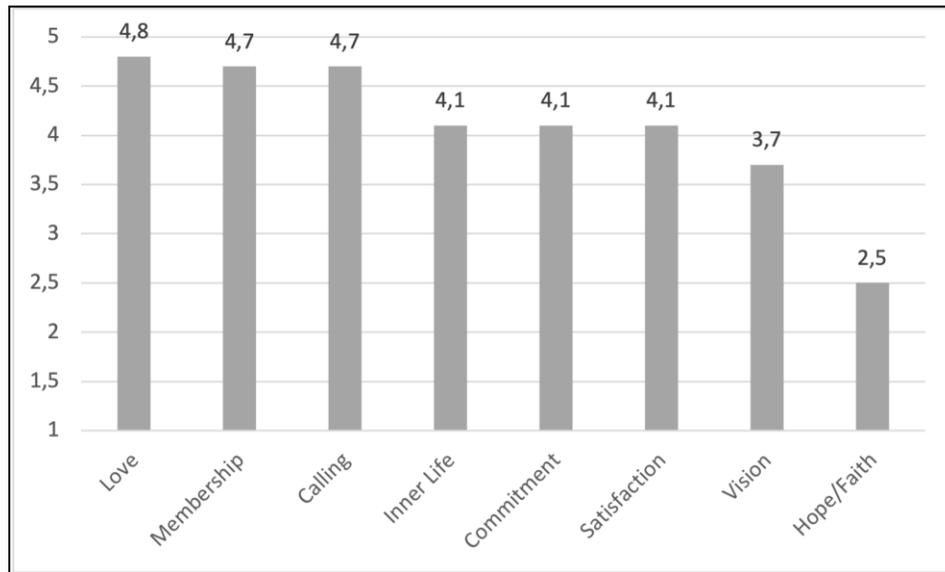
FIGURE 4: Mean Scores of the Spiritual Leadership Theory Questionnaire (SLT).

The fact that hope/faith scored considerably lower in the questionnaire seems to indicate, that the participants have a different perspective on this concept than the one espoused by Fry (2005). The qualitative analysis found that personal spirituality, based on a personal faith-relationship with God, is a central essential experience. I found that the leaders (a) are motivated to persevere and put in the extra effort because of what their seminaries stand for, (b) set challenging goals for the organization, and (c) are willing to invest themselves to succeed. All these are aspects of the hope/faith construct. However, the idea of "having faith in an organization" seemed odd to some participants. They do experience a high congruence of personal vision and the mission of the seminaries they lead, but they are not quick to use the term faith to describe this connection. Consequently, the SLT scores for hope/faith did not represent the reality of the construct in the participant's lived experience. The aspect of vision will be discussed in the section on SLQ.

5.3 Concerning Servant Leadership Theory
The analysis of the participants' results and comments on the SLQ (Ingram, 2003) indicate, that servant leadership is in some respects understood differently in German-speaking Europe than Ingram's (2003) interpretation of the theory.

The SLQ (Ingram, 2003, see also Figure 5) achieved the lowest mean score (M = 3.2, SD = 0.59, Mdn = 3.2). The dimensions of acceptance (M = 2.9, SD = 1.25), influence (M = 2.8; SD = 1.21), and vision (M = 2.4, SD = 1.35) scored below the total mean. The participants often commented on their scoring decisions.

One participant did not respond to any of the SLQ related questions. Nevertheless, my observation of his leadership indicated that he indeed understood himself as a servant leader. His general criticism of the SLQ questions concerned their marginal relevance to servant leadership. The theoretical construct of Ingram (2003) does not conform to his understanding of servant leadership.
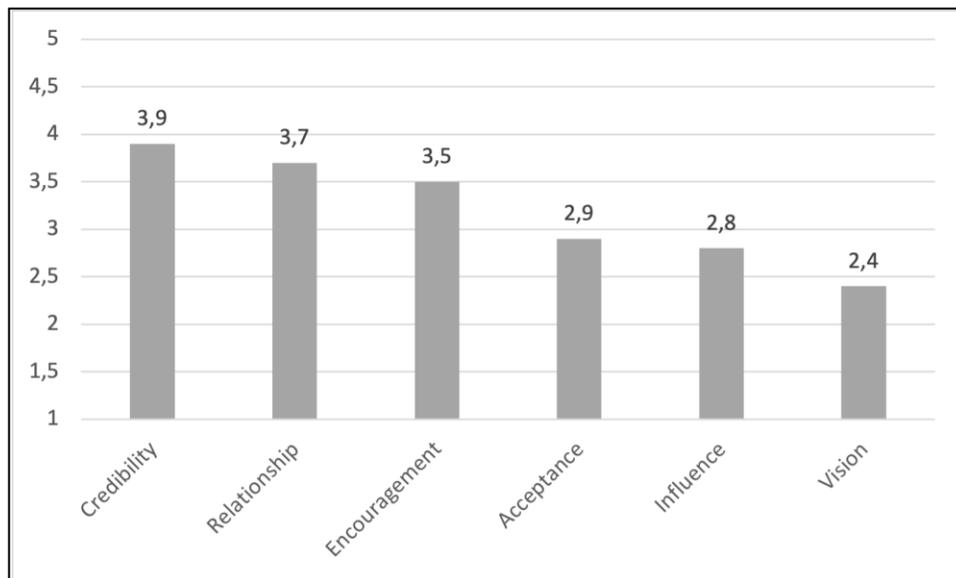
FIGURE 5: Mean Scores of the Servant Leadership Questionnaire (SLQ).

Concerning the dimension of influence, another participant replied to the question, "Servant leadership means leading through persuasion rather than authority", neither agree nor disagree and commented, "sometimes this way [i.e., with persuasion], sometimes that way [with authority]". One pointed out a false dilemma with the question and argued, that persuasion and authority do not necessarily constitute opposites but can complement each other.Authority, as employed in the questionnaire, was juxtaposed to persuasion as the negative of the two choices. In the participants' context authority seemed not to have that negative connotation.

Ingram's (2003) statement, "Servant leadership means developing others to become leaders" was also challenged. One remarked, "not everyone wants to become a leader.… I agree to the following statement: servant leadership means to help others take on responsibility." Ingram applied a value system to this question, where being a leader could be perceived as better than not being a leader. This participant would say, in contrast, it is better to achieve one's goals responsibly. Greenleaf (2002) would have more likely agreed with my participant than with Ingram.

In the dimension of vision, one question of the SLQ (Ingram, 2003) reads, "servant leadership means having a clear vision for the organization's growth." It received a mean score of M = 2.4. This was also reflected in the SLT questionnaire. However, all participants work in seminaries that have a vision statement, and the participants also have clarity as to how to grow the institution. Since the vision aspect is not part of Greenleaf's (2002) theoretical framework, the participants here possibly pointed out a 21st Century reinterpretation of the original servant leadership theory.

The statement, "servant leadership means providing the leadership that is needed," also received a mean score of M = 2.4. One participant commented, "this is a truism that holds for all types of leadership." The participants would not contribute this statement exclusively to servant leadership.

In the dimension of acceptance,five out of six participants agreed that "servant leadership means listening receptively and openly, without judging" (Ingram, 2003). However, the statement "servant leadership means placing the needs of others first" received a mean score of M = 2.9. One leader's comment indicates that he considered the statement an unhelpful reduction. Even

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though the needs demand much of the leader's attentiveness and care, they are not the primary focus of leadership. The participants in this study understood the concept but disagreed with its pre-eminence for leadership practice.

SLT was generally accepted in Greenleaf's (2002) framework, but Ingram's (2003) interpretation and resulting questionnaire did not translate effectively into the German-speaking context.

## 6. EPILOG

This study shows, that lead administrators of free-church seminaries lead from personal spirituality, which also provides the basis for their leadership values. Integration of the three theories applied in this study paints a more complete picture of the lead-administrators' lived experience (see Figure 6). Their values are best expressed in the context of SL. As servant leaders, however, they strive to accomplish within their organizations the goals that SLT describes best, which result in a corporate culture of intentional WS.
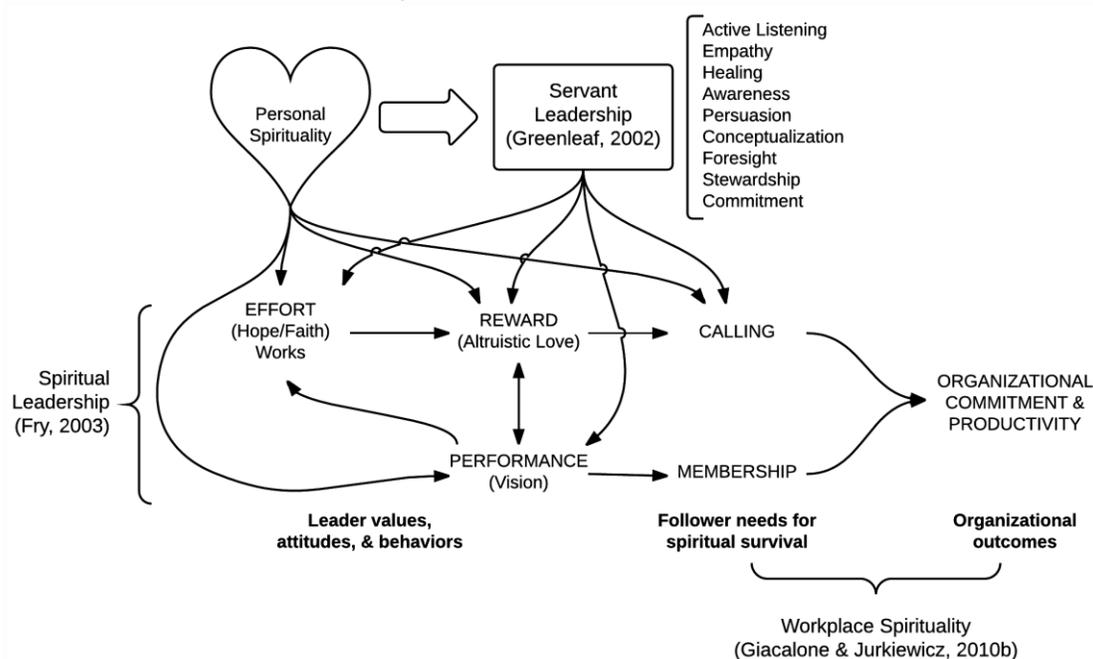


FIGURE 6: Integrating the Theoretical Framework.

Amidst the tension of roles between the pastoral and the administrative, the participants desired to maintain a high level of spiritual leadership at their institutions. Within ongoing developments, the lead administrators are challenged to determine anew how the age-old riddle of faith and reason can be resolved in the 21st century. All testified to a vibrant personal spirituality, which they sought to integrate holistically into all aspects of their lives, and especially into the seminaries they lead. However, professionalization distanced them from the student and held them more occupied with professional and academic-related tasks, so that less time is left to actively engage in shaping and developing institutional spirituality. The participants in this study each had a different approach on how to accomplish this task, and this issue will accompany the lead administrators in the coming years as well.

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# Five Lessons by C.S. Lewis' Narnia, Discovered for Agile Teams

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## Abstract

People could learn from stories. In this article, the question is asked: What can people working in an agile way learn from "The Chronicles of Narnia"? With this goal in mind, five scenes are explained and the lessons are worked out. Since there are a large number lot of ways of working agile, this article is focused on the Kanban Method and Scrum as agile ideas.

**Keywords:** C.S. Lewis, Narnia, Agile, Kanban Method, Scrum.

## 1. INTRODUCTION

Over two decades, people all over the world have been working agile and teaching others, how to work in this way. One option to teach is through stories. In this text, I analyze the scenes of the teams described in "The Chronicles of Narnia" in order to inspect what could be learned from their behavior for real-life teams. I focus on agile teams, because there are some connections between the lessons from Narnia and the guidelines for agile teams, especially for teams working with the Kanban Method or the Scrum framework. Maybe the lessons could also be useful for any kind of team.

The article is a reflective practitioner report, as I have personal experience in working agile. The article describes situations in and with agile teams I have experienced through the years. First, there is a very brief section about agile. Then, there will be a short section giving the background to "The Chronicles of Narnia". In the longest section, the five lessons are described. Finally, there is a brief conclusion.

Before we start, there is a short clarification necessary. "Some folks use agile and agility interchangeably as adjective and noun. Others treat them as different concepts" (Schoor, 2022). Therefore, some use "agile" also as noun (Mahlberg, 2022; Schoor, 2022). In his paper, Schoor write agile is "for single teams" (Schoor, 2022) and describes agility as "the ability of a business as a whole to respond quickly to changes, especially external changes" (Schoor, 2022). In the meaning, I also see a difference between agile and agility. Therefore, I use the word agile as an adjective as well as a noun.

## 2. A BRIEF OVERVIEW ABOUT TEAMWORK IN AN AGILE WAY

This section is just a very brief overview about agile, the Kanban Method and the framework Scrum. It includes what is necessary to understand the lessons described later. It does not include a complete version of the Kanban Method or Scrum. For further introductory information, I recommend Anderson and Carmichael (2016) for the Kanban Method or Schwaber and Sutherland (2020) for Scrum.

### 2.1 The "Birth" of Agile

"Agile project management goes back to agile software development" (Kessler, 2019, p.165). Trying to define a "birth year" for agile brings us back to the "Manifesto for Agile Software Development" (Beck *et al.*, 2001). The manifesto and the principles behind it were written down

and published in 2001 by seventeen men (Beck *et al.*, 2001; *Principles behind the Agile Manifesto*). Yet, this birth date is questionable. "The first books about agile software development were published in the 90s" (Kessler, 2019, p.165). In those days, these methods were not yet summarized under the term agile (Wolf and Roock, 2021, p.v), but under "lightweight" (Beck, 1999, p.xv).

The values and the principles could be seen as a kind of contemporary document. Since Mike Beedle, one of the authors, was killed in 2018 (Eckstein, 2021), there can't be an update from the same group of authors. "Some people just read the manifesto and ignore the principles. But both belong together" (Kessler, 2019, p.167).

The first sentence of the manifesto, the preamble so to speak, is "We are uncovering better ways of developing software by doing it and helping others do it" (Beck *et al.*, 2001). That was what they wanted to reach. Nowadays, some agile teams do not develop, and some others do not even work on a specific software. Nevertheless, they consider themselves to be agile teams and follow methods, frameworks and ideas that have been summarized under the term agile.

The manifesto values "Individuals and interactions over processes and tools" (Beck *et al.*, 2001). But if people try to describe how they work together, they describe a process. Maybe the huge, and still growing number of variants is a result from this statement in the manifesto. Since there is a large variety of methods, frameworks and ideas labeled as agile, an article must be focused to a specific selection. Focusing on the Kanban Method and Scrum, I selected two ideas that are not limited to software. Additionally, the Kanban Method and Scrum are two well-known representatives of agile working (even if some people wish they were not). In their articles, Lambers (2018) and Pein (2018) even mentioned Scrum and Kanban as pars pro toto for agile project management. To not prefer one over the other, I sort them alphabetically.

## 2.2    Kanban Method

Kanban is a word from Japanese and could be translated as "signboard". The Kanban Method is best known for the sticky notes used, yet the Kanban Method contains a lot more. There is the "Kanban Method" (Anderson and Carmichael, 2016, p.1), there is a "kanban board" (Anderson and Carmichael, 2016, p.18) as well as a "kanban system" (Anderson and Carmichael, 2016, p.18). Sometimes all are shortened as "Kanban", but I try to use the full qualified names. In their book, Anderson and Carmichael decided to capitalize Kanban, when writing about the Kanban Method, and not to capitalize kanban, when writing about the kanban systems or kanban boards (Anderson and Carmichael, 2016, p.xi). I behave accordingly.

> **Kanban** is a method for defining, managing, and improving **services** that deliver **knowledge work**, such as professional services, creative endeavors, and the design of both physical and software products. (Anderson and Carmichael, 2016, p.1)

The Kanban Method includes six practices. They are "Visualize.", "Limit work in progress.", "Manage flow.", "Make policies explicit.", "Implement feedback loops." and "Improve collaboratively, evolve experimentally" (Anderson and Carmichael, 2016, p.17).

"Visualize" (Anderson and Carmichael, 2016, p.17) is the practice most well-known from the Kanban Method. It is the practice of using sticky notes, either paper or electronic, for visualizing their work. The added value of using sticky notes is that new information can be added and that a sticky note can be moved easily. So, a kanban board is a board, where the people visualize their work and their process (see Anderson and Carmichael, 2016, p.18). A kanban system is "a delivery **flow system** that limits the amount of **work in progress** (WiP) by using visual signals" (Anderson and Carmichael, 2016, p.1) and should be seen at the kanban board. The teams could and should also visualize their problems, the bottlenecks, the team members, the rules – everything that they need visualized. Of course, "Visualize" has a purpose.

> The act of making work and policies visible—whether on a wall board, in electronic displays, or other means—is the result of an important journey of collaboration to understand the current system and find potential areas for improvement. (Anderson and Carmichael, 2016, p.18)

The six practices combined help the people to work better and more effectively. Because of "Improve collaboratively, evolve experimentally" (Anderson and Carmichael, 2016, p.17), they will explore several ideas. Maybe some teams will try ideas from the Scrum framework.

### 2.3 Scrum

Two authors of the manifesto, Ken Schwaber and Jeff Sutherland, created the framework Scrum.

> [They] developed Scrum in the early 1990s. [They] wrote the first version of the Scrum Guide in 2010 to help people worldwide understand Scrum. [They] have evolved the Guide since then through small, functional updates. (Schwaber and Sutherland, 2020, p.1)

The current update is from 2020. "Scrum is a lightweight framework that helps people, teams and organizations generate value through adaptive solutions for complex problems" (Schwaber and Sutherland, 2020, p.3). The framework contains three accountabilities, five events and three artifacts (see Schwaber and Sutherland, 2020, pp.5-12).

> Scrum Teams are cross-functional, meaning the members have all the skills necessary to create value each Sprint. They are also self-managing, meaning they internally decide who does what, when, and how. (Schwaber and Sutherland, 2020, p.5)

"Scrum defines three specific accountabilities within the Scrum Team: the Developers, the Product Owner, and the Scrum Master" (Schwaber and Sutherland, 2020, p.5). "Developers are the people in the Scrum Team that are committed to creating any aspect of a usable Increment each Sprint" (Schwaber and Sutherland, 2020, p.5). "The specific skills needed by the Developers are often broad and will vary with the domain of work" (Schwaber and Sutherland, 2020, p.5). "The Product Owner is accountable for maximizing the value of the product resulting from the work of the Scrum Team" (Schwaber and Sutherland, 2020, p.5). "The Scrum Master is accountable for establishing Scrum as defined in the Scrum Guide" (Schwaber and Sutherland, 2020, p.6). Describing the events: There is one event containing the other ones: the Sprint. "Sprints are the heartbeat of Scrum, where ideas are turned into value" (Schwaber and Sutherland, 2020, p.7). The Sprint includes the events "Sprint Planning", "Daily Scrum", "Sprint Review" and "Sprint Retrospective" (Schwaber and Sutherland, 2020, pp.8-10). "A new Sprint starts immediately after the conclusion of the previous Sprint" (Schwaber and Sutherland, 2020, p.7). At the "Sprint Planning" (Schwaber and Sutherland, 2020, p.8) the work for this Sprint is planned and at the "Sprint Review" (Schwaber and Sutherland, 2020, p.9), the outcome of a Sprint is inspected. "The purpose of the Sprint Retrospective is to plan ways to increase quality and effectiveness" (Schwaber and Sutherland, 2020, p.10). "The Daily Scrum is a 15-minute event for the Developers" (Schwaber and Sutherland, 2020, p.9) to inspect their progress daily. Since this article does not go deeper within the artifacts, they are not explained here.

### 2.4 Limitations

Working in an agile way, people need to be responsible. Being responsible is a learning process, like anything else. If the people do not learn to be responsible, agile work could even stop them. As an example, a study about the Kanban Method identified:

> On the pro side problems and bottlenecks become visible quite early, but on the con side, if nobody feels responsible and the bottleneck is not resolved, the WIP limit stops the whole development process. (Harzl, 2017, p.10)

It could be questioned if in this case they really work agile or if it is just a kind of Cargo Cult. I use Cargo Cult as Nobel Prize winner Richard Feynman defined it.

> Feynman called things that looked like science but are not, 'Cargo Cult Science', after the cults that emerged on some South Pacific islands after the Second World War. The islanders had watched planes coming into land, and noticed that this was often accompanied by the appearance of valuable commodities from the outside world. So they built runways, control towers even, out of sticks and stones. (Hanlon, 2013, p.52)

Another limitation could be reality itself. While the descriptions of working agile assume an ideal environment, the reality is often not ideal. Even in trying to change what is possible, there could hardly be changeable limitations because of the project, the environment, the company or even the law.

> A team's goal should be to be as agile as possible given the context in which the team works. All projects have constraints. A project for which the team has seven people and the team cannot be expanded needs to be agile within that context. A team that is told it must deliver by a certain date needs to be agile within that context. (Cohn, 2021)

Nevertheless, it could be frustrating to read all the ideal books and papers about agile compared with the personal environment. We live and work in changeable reality, not in a fictional world – neither in an agile wonderland nor in Narnia.

## 3. THE CHRONICLES OF NARNIA

What is summed up as "The Chronicles of Narnia" nowadays, are seven books, written by C.S. Lewis and first published between 1950 and 1956 (Coren, 1998, pp.125-126). Narnia is also a world that humans visited in "The Chronicles of Narnia". Narnia is also a country in the world of Narnia. I will focus mainly on the world of Narnia, in separation to our real-life world. When referring to the books, I will use the term "The Chronicles of Narnia".

### 3.1 C.S. Lewis, Author of "The Chronicles of Narnia"

C.S. Lewis, author of "The Chronicles of Narnia", was born in 1898 in Ireland (McGrath, 2014, p.23). Lewis "grew up under oppressive schoolmasters, fought on the front lines of a world war, and was a prominent voice of optimism during a second world war" (Hurd, 2012, p.2). He was part of the Inklings and a friend of J. R. R. Tolkien (Mühling, 2005, p.11). Lewis was author of the book "MERE CHRISTIANITY". The content of that book was aired before on the radio (Lewis, 2019, position 79). He wrote several theological articles and books. Also, he wrote some fantastic novels, like the "Chronicles of Narnia". He died in 1963 (McGrath, 2014, p.416). Nearly five decades later, Hurd stated about him: "Lewis deepened the faith and the intellect of many and for this he has *truly* become a transformational leader" (Hurd, 2012, p.8).

### 3.2 About the Books

"The Chronicles of Narnia" were published in the 1950s. Lewis wrote them as children's books. The books were written in a different order than published, and the internal chronology also has a third order (McGrath, 2014, p.321). In addition to purchasing each individual book, complete

editions of "The Chronicles of Narnia" are also available. "In total the Narnia books have sold more than 100 million copies and been translated in more than 47 languages worldwide" (Andreeva, 2018). Since their publication, some books were adapted for TV (in the twentieth century) and cinema (in the twenty-first century).

> Their highest-profile [...] adaptation was the series of three Sony movies, *The Lion, the Witch and the Wardrobe* (2005), *Prince Caspian* (2008) and *The Voyage of the Dawn Treader* (2010), which combined have grossed over $1.5 billion worldwide. (Andreeva, 2018)

In 2018, "Netflix has closed a multi-year deal with The C.S. Lewis Company to develop new series and film projects based on Lewis' popular *The Chronicles of Narnia* books" (Andreeva, 2018). To sum up, "C.S. Lewis continues to entrance generations of readers by leading them through the mystical wardrobe into his magical kingdom of Narnia, ruled by the magnificent kingly lion Aslan" (Shober, 2019, p.1).

### 3.3 Aslan and the World of Narnia

The world of Narnia is a medieval world, filled with mystical and fantasy creatures. We find talking beasts, dwarfs, centaurs, unicorns and also Father Christmas. And – there is the lion Aslan.

> Aslan, in his leonine form, characterised many of the spiritual elements Lewis intended to weave into his Narnian series, portraying as he did the multiple figures of Creator, Saviour, Deliverer and Ruler. (Shober, 2019, p.1)

When asked if he is also in our world, Aslan confirmed and added "But there I have another name" (Lewis, 2001, p.541).

> Thus, by selecting a lion – a magnificent creature already associated with power and nobility – to portray his biblical Christ-figure Aslan in The Chronicles of Narnia, Lewis seeks to project the divine in a recognisable and understandable form. (Shober, 2019, pp.4-5)

The world Narnia was created in the book "The Magician's Nephew" and was destroyed in the book "The Last Battle". The other five books tell stories that happened between creation and destruction. In six of seven books, people from our world came to the world of Narnia, sometimes with an (unknown) mission. The story of one book takes place entirely in the world Narnia.

### 3.4 The Country of Narnia

The country of Narnia is one of many countries in the world of Narnia. It is a kingdom ruled (mostly) by a human being. When people went from our world into this world, they either went to the country of Narnia or met inhabitants of this country.

## 4. LESSONS FROM NARNIA

"The Chronicles of Narnia" were often analyzed, mostly with a theological view (see Mühling, 2005; Smith, 2005; Shober, 2019). Being aware of this theological view, I will not fully ignore it – especially, when Aslan is an important part of a scene. In this article I add another view, focusing on what agile teams could learn from them. That may seem unusual, but it is not unusual. There are other fictional stories that were interpreted from a management perspective. For example, Roberts and Ross wrote about the fictional TV character Jean-Luc Picard (from the series "Star Trek: The Next Generation") and what can be learned from him (see Roberts and Ross, 1996).

The selected scenes have a (maybe quite hidden) connection to Kanban Method as well to Scrum. This article uses selected scenes to explain and illustrate the important points. Since some scenes are not understandable without at least a little background, this background is given in the paper. I selected three books for this article: "The Lion, the Witch and the Wardrobe", "Prince Caspian" and "The Voyage of the *Dawn Treader*". These were the first books written by Lewis and also the three in which the siblings Lucy and Edmund are the main characters.

## 4.1 The Lion, the Witch and the Wardrobe (1950)
In the book "The Lion, the Witch and the Wardrobe" the four siblings Peter, Susan, Edmund and Lucy were introduced. They were evacuated from London to a Professors house because of World War II. There they came to Narnia by the eponymous wardrobe.

### 4.1.1 Trust Is Built by Past
Lucy, the youngest child, was the first one of her family who visited Narnia. Her siblings did not believe what she told them about her magical adventure. On her second trip Edmund also came to Narnia and experienced that Lucy's story was right. Back in our world he lied to Peter and Susan by saying that they "have been playing" (Lewis, 2001, p.129). Peter and Susan, the older ones, asked the Professor for advice, fearing Lucy had become mad. He reacted with a question: "For instance – if you will excuse me for asking this question – does your experience lead you to regard your brother or your sister as the more reliable? I mean, which is the more truthful?" (Lewis, 2001, p.131) What Lucy told them seemed unbelievable. The professor reminded the children about the past. For him, the behavior before this unbelievable story was important. For him, trust is built by the past.

Sometimes, I hear people say or even write: "Now we work agile, so you should trust us." What I miss is a look back in history: Has something happened that made it nearly impossible to trust these people? Should they change their behavior so that they can claim to be trustworthy? (Hopefully, not spoiling a more than seventy-year-old book: Later, Edmund did change his behavior. At the end of the book, he "was called King Edmund the Just". (Lewis, 2001, p.194)).

Lack of trustworthiness could be a problem inside the team as well between a team and other people. A team working with Scrum has the "Sprint Retrospective" (Schwaber and Sutherland, 2020, p.10). There, the "Scrum Team discusses what went well during the Sprint, what problems it encountered, and how those problems were (or were not) solved" (Schwaber and Sutherland, 2020, p.10). If the lack of trustworthiness is inside the team, they could start to work at this problem using the "Sprint Retrospective" (Schwaber and Sutherland, 2020, p.10). If the problem does not appear in a "Sprint Retrospective" (Schwaber and Sutherland, 2020, p.10), which is the most obvious place for it, they need to find another way to handle it.

Maybe, the people that are not able to trust the team, are outside the team. So, they are not in the group of participants of the retrospective. Fortunately, the "Scrum framework is purposefully incomplete" (Schwaber and Sutherland, 2020, p.3). Maybe, the team could have a meeting with these people, similar to a retrospective, but with other participants and a bit different focus.

## 4.2 Prince Caspian (1951)
Time flows differently in Narnia than in our world. At the beginning of "Prince Caspian", from the view of the four siblings one year passed. In Narnia, "hundred of years have gone past". (Lewis, 2001, p.330) The adventures in "The Lion, the Witch and the Wardrobe" became myths in Narnia. Some also believed they never happened. At the same time, the land Narnia was divided. There were the ones calling themselves Old Narnia, and the Telmarines. Caspian was by birth a Telmarine, and, while growing up, interested in Old Narnia. Since he was the son of the last king, he was to become the next king. His uncle Miraz, who led government business, wanted to claim the crown for his own son. Caspian escaped, found Old Narnia and became part of it. They tried to fight against Miraz.

### 4.2.1 Make Discussion Steps Explicit

Since they were unsuccessful, they tried to get some help. Therefore, they wanted to blow a magical horn to get help from Aslan or someone Aslan would send. They did not know where their help would be found. So, they needed to send some people to the most likely places. At this very moment, the dwarf Trumpkin signed up for use. Caspian was confused, knowing that Trumpkin does not believe in magic and the old stories. Trumpkin reacted with "You are my King. I know the difference between giving advice and taking orders. You've had my advice, and now it's the time for orders" (Lewis, 2001, p.360).

Trumpkin made clear that for him the aim of the discussion has been changed. By saying it, he made it explicit (Remember "Make policies explicit." (Anderson and Carmichael, 2016, p.17) in the Kanban Method). Of course, this was actually the king's duty. As well in our time, a leader or a moderator of a discussion should be explicit. If that does not happen, every participant could offer his interpretation, like Trumpkin.

Again, we look at the "Sprint Retrospective" (Schwaber and Sutherland, 2020, p.10). The guide does not include an agenda, but still a good set of five phases exists. These phases are "Set the stage", "Gather data", "Generate insights", "Decide what to do" and lastly, "Closing" (Esther Derby and Diana Larsen, referenced in Wolf and Roock, 2021, p.135). Of course, the retrospective including every phase must be moderated. In Scrum, this is a job for the Scrum Master (Wolf and Roock, 2021, p.139). If a team has retrospectives without using Scrum, it probably has no Scrum Master. In this case, another person should moderate. I have experienced that it is easier for all participants if the moderation always makes clear, at which phase of the retrospective they are at any given moment.

### 4.2.2 Everyone Has a Say

Trumpkin found the four children. After he was convinced that they could help, they were on the way to Caspian and his army. At one point, there was a fork in the road. They had to decide which way they should go. Lucy told the others that she had seen Aslan at one of the ways, Trumpkin argued that she maybe had seen just a normal lion (Lewis, 2001, p.373). Yet, they were five individuals and each of them was asked to say which way he or she preferred. There was no kind of "Trumpkin is none of us, he is not allowed" or the other way around. After everyone spoke, they counted and went the way that had more votes (Lewis, 2001, p.374). And yet, from a theological point, the wrong decision was made. Aslan wanted them to follow Lucy (or at least, Lucy should go alone) (Lewis, 2001, p.380). Even if we have good human like ways to decide, in a theological situation we should be open minded for God to use those ways – or not.

There are several ways to include every person. The simplest way (yet maybe not the best) is, as in the book, just to ask everyone one by one. There are also some methods to help people to answer with their individual, non-influenced point of view, and one is described in Kessler (2020).
A point could be to identify "everyone". Who should be involved? In Scrum, the answer could be: the Scrum Team. "The Scrum Team consists of one Scrum Master, one Product Owner, and Developers" (Schwaber and Sutherland, 2020, p.5). "Scrum Teams are cross-functional, meaning the members have all the skills necessary to create value each Sprint" (Schwaber and Sutherland, 2020, p.5). That does not mean that a Scrum Team has every skill that ever existed in the company. Sometimes, they have to ask others for help. In this moment, these persons could become part of "everyone". It is important to ask the question so that the Scrum Team and the persons think about it and decide explicitly rather than without thinking.

Using the Kanban Method, there is the practice "Manage flow" (Anderson and Carmichael, 2016, p.17). All people that are working at the flow, are included, in theory. Some time may be needed until everyone accepts this point of view and the theory becomes practice.

### 4.3   The Voyage of the *Dawn Treader* (1952)

At the end of "Prince Caspian", Caspian became the new king of Narnia and the four siblings returned home. Peter and Susan were told by Aslan that they will not come back to Narnia (Lewis, 2001, p.418). Edmund and Lucy hoped for another adventure. When visiting their cousin Eustace, their hope was fulfilled. With Eustace they came to the ship *Dawn Treader*. It was a ship from Narnia and Caspian was there, too. Together, they experienced some very episodic adventures.

### 4.3.1  Try to Be Understandable for Uninitiated

For this point, we have to understand Eustace's point of view. This is quite complicated, because Eustace (at the beginning) is not a character that Lewis wanted us to like. Eustace's introduction was: "There was a boy called Eustace Clarence Scrubb, and he almost deserved it" (Lewis, 2001, p.425). Eustace came to what for him was a new world about which he heard and had made jokes in the past. In Narnia, he felt uncomfortable and superior over every other being. Eustace wrote a diary on board. This is what he wrote about Caspian: "They call him a king. I said I was a republican but he had to ask me what that meant!" (Lewis, 2001, p.437) This is a sentence from a (British) republican child from the 50s, not from a member from today's Republican Party of America. Obviously, Eustace and the others could not understand each other. And maybe, Eustace did not even want to understand them. Still, Lucy and Edmund, knowing both worlds, could try to explain Narnia to him better. (From a theological point, the change of Eustace's behavior is mostly understood as a conversion (see Ortlund, 2016, p.8). He met Aslan (Lewis, 2001, pp.473-475). So, we do not know if Lucy and Edmund would be more successful when explaining more and better.)

Some teams working agile speak in a secret language. They understand each other very well, but non team members are not able to follow. Mostly this happens for efficiency. It would be a bold claim to say that some use this secret language to hide their own miss- or non-understanding. And maybe some use this secret language as a sacred language to separate those who know from those who do not know. Let us remember "helping others do it" (Beck *et al.*, 2001), as written down at the preamble of the manifesto. In the spirit of this preamble teams working agile should be able to speak in a way that others can understand. This includes the explanation of the used formulations and abbreviations. Unfortunately, some different agile currents behave the same of dealing with each other as they do with non working in an agile way people. They use their secret formulations and abbreviations and expect that everyone can and has to understand them. This complicates communication.

People working with Scrum or the Kanban Method should be aware of this lesson. One of the "empirical Scrum pillars" (Schwaber and Sutherland, 2020, p.3) is "Transparency" (Schwaber and Sutherland, 2020, p.3). "*Transparency*" is also one value in Kanban (Anderson and Carmichael, 2016, p.3). There it is defined as the "belief that sharing information openly improves the flow of business value." (Anderson and Carmichael, 2016, p.3) Anderson and Carmichael wrote that "Using clear and straightforward vocabulary is part of this value" (Anderson and Carmichael, 2016, p.3).

### 4.3.2  Be Open Minded for Unexpected Ideas

A character that I left out until now, is "Reepicheep, the most valiant of all the Talking Beasts of Narnia, and the Chief Mouse" (Lewis, 2001, p.430). He fought in Caspian's army and was also onboard in the *Dawn Treader*. "His mind was full of forlorn hopes, death-or-glory charges, and last stands" (Lewis, 2001, p.455). This is important information for the next scene:

When the *Dawn Treader* was attacked by "the great Sea Serpent" (Lewis, 2001, p.478), he was the one calling: "Don't fight! Push!" (Lewis, 2001, p.479) No one followed his advice. Then, he himself started to push the Sea Serpent from the ship. Of course, a mouse was not able to fulfill

this action, but his example helped the crew to understand and follow. It was Reepicheep's example that saved the ship on that day.

Reepicheep's idea was quite a surprise for everyone. Yet, this idea was necessary for them. In his behavior, we see a demonstration of "Encourage acts of leadership at every level" (Anderson and Carmichael, 2016, p.10), one of the change management principles at the Kanban Method. And we also see an example for voicing an unexpected idea. The challenge might be to create a place and time for people to voice new ideas. To find and to validate ideas, the Kanban Method has the practices "Implement feedback loops." and "Improve collaboratively, evolve experimentally" (Anderson and Carmichael, 2016, p.17). The feedback loops can provide ideas and these can be tested with experiments. It is important to decide when the idea is validated or falsified before running the experiment. With measure points, even an unusual idea can be checked. "Kanban is fundamentally an improvement method" (Anderson and Carmichael, 2016, p.26). Thus, it is important to find ideas that improve the team, the product and the environment.
A Scrum Team can use the same techniques. "The Scrum framework is purposefully incomplete" (Schwaber and Sutherland, 2020, p.3). If one idea is to discard one Scrum artifact or event, then please be aware, that "Scrum exists only in its entirety" (Schwaber and Sutherland, 2020, p.13). Of course, a team can decide to discard an element of the Scrum Guide and become a team that just uses Scrum events and artifacts without being a Scrum Team. Most teams were paid to do their work, not to follow a framework.

## 5. CONCLUSION
These five examples, taken from "The Chronicles of Narnia" each contain a lesson for teams working agile. I showed that these lessons are not in contradiction, but in addition to what agile teams had learned. If there is a need in a team to speak about one of these points, the corresponding scene from "The Chronicles of Narnia" is useful as a conversation starter or as a learning unit. In this way, these old children's books could help agile teams to fulfill their work even a bit better.

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