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# Understanding from Within

## Working with Religious Systems

By Michelle Heyne and  
Robert A. Gallagher

We practice OD “from within” church systems. In the most obvious sense that is because we are practicing Christians in the Anglican tradition. We participate in the Eucharist each Sunday and in the daily prayers of the church. We engage in practices of reflection and community. We seek ways to serve. That we are relatively proficient practitioners in our religious tradition does help us gain entry and trust with client parishes and dioceses.

There is also a less obvious way in which we practice OD “from within.” We seek to understand and appreciate the values and deeper underlying assumptions of the groups we work with. For us that process is an eclectic mix of Edgar Schein’s work on organizational culture and the systems-oriented approaches found in pastoral and ascetical theology.

After sharing a case example of how OD can be applied from within church systems, we describe what influenced churches to consider OD, the Episcopal Church’s particular relationship with OD, and what is a pastoral and ascetical theology-based OD approach.

### A Case Example

When its rector retired in 2003, St. Paul’s had reached a plateau marked by attendance decline, low energy, and moderate financial difficulties. During the subsequent interim period, these difficulties were exacerbated. The parish then hired a new rector who had completed training in the Church Development Institute (CDI) and had obtained a certificate in OD from

NTL. Within the first two years of the new priest’s leadership, the parish experienced significant changes:

- » From average Sunday attendance of 89 to 150; in 2014 pressing toward 300;
- » From an operating deficit of about \$70,000 and in default to the diocese, to a balanced budget and current on diocesan obligations;
- » From ambivalence about identity to a widely-shared commitment to its identity as a progressive “Anglo-Catholic” church; and
- » From a deeply prayerful parish beset by anxiety and inertia, to a parish grounded in both prayer and hope and beginning to confidently set a path forward.

The new rector began work on several fronts in building the capacity of the whole system. She used her OD skills and knowledge in a manner that connected with the spirituality of the Anglican tradition. She quickly identified the parish’s fuzzy identity as a key area for change. While well-known for the beauty of its liturgy and operating out of an Anglo-Catholic tradition, segments of the parish were ambivalent about that identity.

During the first two years of her tenure, she implemented initiatives to strengthen the inclusion and formation of members, the sense of community, and the life of common prayer. These initiatives were developed using standard OD methods and knowledge in combination with the use of pastoral theology models such as those discussed later in this article.

Here is some of what was done:

- » Parish-wide listening/conversation sessions identified strengths, clarified priorities, and built shared commitment. Survey feedback processes were used that kept the data real-time and tangible, avoided bureaucracy and delay, and built trust and commitment by openly sharing valid and useful information. The process capitalized on energy generated in the room and moved quickly to recruit volunteers for working groups.
- » Improved quality of Sunday worship by training members for a more proficient participation in the Eucharist and increased the training of servers and readers. Music was further integrated in the flow of liturgy.
- » Experiential and participative educational methods were used to help members explore and make decisions about how they would shape their spiritual life. The Benedictine tradition's emphasis on community was combined with OD skills to improve two-way communication and have focused conversations around community issues.
- » Community life was improved by facilitating connections with others, attending to early inclusion, and reinforcing the general culture of acceptance and invitation. This took shape in the coffee hour after Sunday mass, groups going to a local pub after evening classes, and regular newcomers' gatherings in the rector's home.

We will revisit the case later in the article.

### **Coming to a Willingness to Understand Itself in New Ways.**

What brought Saint Paul's Parish, Seattle, and other churches to make use of OD? There are two parts to this backstory. First, there's what came out of the Second World War; and second, there's the particular relationship of the Episcopal Church with Organization Development.

### **The Context after the Second World War**

The general context for churches' use of OD emerged out of the Second World War. There were five threads:

- » A questioning of the usefulness of the parish as the primary structure for the church's work. There were experiments of many kinds—house churches, worker priests, and inner-city missions.
- » Parish churches faced a new social arrangement. Before the war people tended to live in the same community and work for the same employer all their lives. After the war that shifted to a society in which there was more mobility. The sectors of life became more fragmented, with work, family, religion, civic life, leisure, and education in competition for the person's time, money, and energy.

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- » The failure of the church in Germany was a moral and institutional crisis for large segments of the church. There was a sense of shame in the recognition that the baptized Christians in the institutions of the military, courts, police forces, and business community rarely did anything significant to oppose, and in many cases colluded with, the Holocaust and a war of aggression. That failure was seen in contrast to the work of Lutheran Pastor Dietrich Bonhoeffer and the Confessing Church. Bonhoeffer was executed because of his resistance activities. His thinking was that what mattered was that people take responsibility for their world; that we are to enter into the struggles of life and history and accept the uncertainty and possible guilt that comes with responsible action.

- » There was interest in the church's role in the "humanization of institutions." The World Council of Churches conducted an action-reflection study on "The Role of Christians within Changing Institutions: Studies on Humanization and Mission." The Roman Catholic Church engaged the same theme in John XXIII's *Pacem in Terris*: it is not enough for Christians "to be illumined by the heavenly light of faith and to be fired with enthusiasm for a cause; they must involve themselves in the work of [every] institution, and strive to influence them effectively from within" (John XXIII, 1963).
- » A network of industrial missions was established. The most famous was the Detroit Industrial Mission, working with the auto makers and the UAW. In

Philadelphia there was MAP (Metropolitan Associates of Philadelphia) conducting action research on how Christians might influence the institutions in which they worked. "During its last 5 years, MAP focused its energies on trying to better understand the change process within institutions, and the way in which local churches might offer support for laity committed to serving as change agents within the organizations where they worked" (Specht, Broholm, & Mosel, 2001).

A sixth thread emerged in the 1960s. The church began to experience a loss of membership and the need to reduce the costs of maintaining so many buildings.

This historical and sociological context caused church leaders of all

denominations, including the Episcopal Church, to seek new ways to address institutional life.

### ***OD and the Episcopal Church***

Billie Alban, Barbara Bunker, and Dick Axlerod (2007) in their chart of the development of Organization Development name four “early adapters”: the military, TRW Systems, General Mills, and the Episcopal Church.

In 1971 Loren Mead defined the church’s OD role in a position paper, “The Parish is the Issue.” Mead was the director of Project Test Pattern (PTP), an Episcopal Church action research project learning about how parishes might be renewed. Mead wrote about his contact with consultants working with parishes, “It became obvious quickly that the consultants in the field were in touch with information that the Church did not have about the way that parishes work” (p.13). Mead identified the work of parish development consultants as based in the descriptions found in the Addison-Wesley Series on Organization Development and in *Process Consulting* by Edgar Schein. He differentiated parish development from other models of change in congregations, such as the crusade or revival, clustering parishes in common effort, and leadership development.

This direction took institutional form quickly. PTP launched a series of action research consultations in parishes. The Mid Atlantic Training Committee (MATC), an ecumenical agency with strong Episcopal involvement, offered dozens of labs each year in human relations, group development, and experiential education design skills. MATC also launched Organization Development in Volunteer and Religious Systems, a year-long program with three weeks of workshops, application, reading in between workshops, and the use of an experienced practitioner as a coach. The Association of Religion and Applied Behavioral Sciences was established, offering a recognition process in OD and other fields. Loren Mead convened a Conference for Managers of OD Networks (most from Episcopal dioceses) creating a common base of “best practices” and generating

interest in the development of diocesan consulting networks.

Today in the Episcopal Church it is routine to hear of a parish using Appreciative Inquiry and methods for increasing participation and listening in meetings. You also hear words and phrases that suggest familiarity with OD, along with various diocesan and national programs offering brief introductions to theory. Mostly it is thin stuff.

There are however three training programs offering a more comprehensive, competency-based approach. All have integrated OD in training parish teams—the Church Development Institute (CDI), *Shaping the Parish*, and the College for Congregational Development. All share core elements such as 6–8 workshop weekends, a course of reading in the field, and the completion and critique of 3–6 developmental initiatives in parishes. *Shaping the Parish* also includes coaching for each parish team and an early T-group weekend with a focus on group dynamics and feedback skills.

Over the last 20 years 18 US dioceses (of 99) and one Canadian (of 34) have made use of these programs. There have also been hundreds of individuals attending national expressions of the programs. Around half of those dioceses have engaged the programs for enough years to see a significant impact on their parishes.

Leaders in parishes that have been through one of the programs are more likely to understand the consequence of doing survey feedback rather than a mass survey. Most have read large sections of Cummings and Worley’s *Organization Development & Change* and Schein’s *The Corporate Culture Survival Guide*. They have used models from OD and pastoral theology to help their parishes assess, plan, and act. They have used the MBTI in regard to emotional intelligence, organizational leadership, and group dynamics. They have learned group participation and facilitation skills.

In the late 1980s the Diocese of Connecticut required all of its small, struggling, financially-aided parishes to participate in processes of self and peer reflection and assessment, meet together on a regular

basis, and make use of a trained consultant. As new priests were appointed they were required to complete an early form of CDI, in addition to the other requirements. Over a five-year period parishes with leaders participating in the CDI training program experienced 80% average pledge increase (vs. 68% for non-participants) and 24% in attendance (vs. 15%). All these parishes reported increased satisfaction with the central elements of parish life, e.g., worship, formation, service, evangelization, etc. This occurred while the state’s population was declining and as the percentage of the diocesan budget allocated to financial aid to these was also declining.

### **Drawing on the Church’s Self Understanding**

#### ***Using OD in Combination with Pastoral/Ascetical Theology***

During the 1970s and into the 1980s the church’s use of OD was largely grounded in the MATC program, Organization Development in Volunteer and Religious Systems (which had learned from a variety of NTL and university-based programs). The program did not, however, make very useful connections between OD and the unique dynamics of the parish church.

The shared experience of many church members was that while the skills and methods were seen as valuable, there was not an explicit exploration that related it to the church’s faith and practice. Some participating in the 1976 MATC program found themselves wanting a direct, rather than presumed, connection between spirituality and OD. That connection was developed in the early CDIs of the Dioceses of Pennsylvania (1976-1981) and Connecticut (1982-1988) and again at the General Theological Seminary (1985–2000). Models grounded in Anglican and Benedictine spirituality were used to explore the spiritual life of parish churches. It was a beginning.

The church faces a significant problem in that few people in parish leadership (and even fewer non-leader members) receive any significant training in the practical theology of the parish church or in how to effectively partner with one another. On the

whole, the seminaries and first-two-years-out programs fail in what they could do to work on increasing emotional intelligence, basic group and OD skills, and an understanding of the parish church grounded in a systems approach to pastoral and ascetical theology.

OD, by its nature, is complex and implementation of OD processes is demanding. A lack of shared theological conception and language by the parish's members and leaders—what amounts to a misunderstanding, often not articulated, of the parish's primary purpose—can exacerbate the challenges commonly experienced in organizations that embark on OD improvement processes.

This means that while it is true that the parish church could make use of all the same basic OD theory and methods as any other organization, as OD established its value in church systems we also needed ways that took into account the unique dynamics and issues of the parish church, and provided quickly-accessible pathways to shared understanding of its purpose and highest expressions. For the church, the parish was a microcosm of the Body of Christ and was *also* a nonprofit organization.

The need was for “understanding from within.” The church needed a way of using OD that was expressed in its own language and from the perspective of its self-understanding. The nature and mission of the church needed to play a role in the conversation. The practices of the church needed to be seen by the OD practitioner as interventions that advanced or hindered the health of the parish. Pathways to increased health needed to be based in both the common prayer and spirituality of the church, and OD understandings of the parish as a system.

The fields of pastoral or practical and ascetical theology came into play. The part of pastoral theology that most directly connects with parish development is the work to understand society and human need, and from that to shape parish communities that will effectively address that society and those needs. The question is: What kind of oversight and leadership, structure and spiritual life, do we need in a parish church

to equip Christians, in our tradition, to address the pressing social issues and needs of this age?

Ascetical theology is about spiritual practice. It is concerned with the on-going task of living the Christian life and reflecting upon it. The questions are:

- » What kind of person and human community do we want to shape?
- » How might the parish contribute to that task?
- » How do we foster practices that increase emotional intelligence and spiritual maturity; practices that assist people in being responsible participants in their workplace, civic life, families, and friendships?

### *Under the Tip of the Iceberg*

The starting place in pastoral and ascetical theology, as with OD, is to look at what “is.” We begin with what is already happening rather than with what “should be.” The task is not to offer an idealized image of the “best” but to ground the improvement of the parish system in what already has life in the culture and tradition. We begin there even if that life is weak and distorted, as is the case in too many parishes.

In each of the three models offered below we begin with what already exists.

- » People engage spiritual practices and return to the routines of daily life in family, with friends, at work, and in civic life.
- » A parish expresses forms of common prayer, community life, ways of reflection, and service to others.
- » The parish church is a community that includes people in various stages of their spiritual life and provides resources for change. The parish is made up of the disciplined and proficient along with the tentative. It consists of people present every Sunday along with those coming only on Christmas and Easter.

The models work from within the church's self-understanding. They also suggest an approach to what we are to measure.

Leaders and members most commonly understand the parish's success in terms of attendance at programs and worship and

whether people are “satisfied.” In some parishes, satisfaction is achieved as long as they are not producing hurt, unhappiness, and depression; in others they seek harmony, contentment, and occasional enjoyment. It is as though it would be an adequate measure if General Motors sold no cars and made no money but the employees were satisfied and usually showed up at the plant and office.

### **Primary Task**

“Every organization has some central process for which it exists” (Albrecht, 1983, p.4). Albrecht called it the “prime axis.” In the church a common way of conceptualizing that process is as a cycle, or oscillation between two poles: active—contemplative, gathered—scattered, extradependence—intradependence, consolation—desolation, renewal—apostolate, inward nurture—outward witness.

One point of confusion comes when people pull apart the oscillation. Instead of its being an integrated process it becomes a preference between the poles (I'm more activist vs. I'm more contemplative) or a seeking of balance (we need the right amount of attention to renewal and the right amount to apostolate).

### *Renewal-Apostolate Cycle*

In our work we have looked upon facilitating that central process as the primary task of a parish. We call the process the Renewal–Apostolate Cycle (Gallagher, 2008).

This cycle describes a central dynamic of the individual's and parish's life. It focuses attention on the movement between being renewed in baptismal identity and purpose and living our daily life—in our families, with friends, in the workplace, and in our civic life. The cycle is between a conscious and intentional attention to our renewal in the spiritual life, and a subconscious reliance upon that spiritual life. The parish is to offer the climate, structures, and processes that assist in that renewal and contribute to the oscillation. In its own understanding it is to provide the climate, prayer life, and other resources that renew baptized members in their faith

and practice so they may be instruments of the Divine Compassion in daily life.

### Primary Elements of the Parish System

What are the key elements that relate to the organization's functioning? There are many OD models that identify the key elements of a system, such as Weisbord's Six-Box Diagnostic Model. We have used models like these to help parishes get a pic-

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ture of their key systems in the same way as any other nonprofit organization.

In our work with Episcopal churches we also use models that address elements of the parish's spiritual practice. Benedictine spirituality, which is deeply embedded in Episcopal culture, considers how the parish functions in light of the community's need for Stability (primarily found in worship and relationships), Obedience (mutual listening in community to ourselves, our leaders, God, the tradition, and the wider church), and Conversion of Life (change that emerges from Stability and response to careful listening).

We also use a map of spiritual practices that includes five elements. At the base there are two practices—one weekly, one daily. That rhythm is common to many religious and spiritual traditions. These elements have to do with living in the habits and ways that keep us grounded in that tradition. In Anglicanism they take form as the Holy Eucharist (Mass) and the Daily Office (Daily Prayer of the Church). There are two more elements standing

side-by-side—Community and Reflection. We participate in imperfect communities that we allow to nurture and influence us, including a parish church. Reflection includes developing our capacity to be silent and still, to listen, and to learn from our experience. The final element is Service. Individuals serve in ways that fit their gifts and temperament. The parish develops an expression of common and shared service. The assumption is that such

service will be more fruitful and authentic, and less self-serving, when it sits upon the base of the other four spiritual practices (Heyne, 2011).

### Critical Mass: A Shape of the Parish Model

Critical mass models are an important OD tool used to assess the organization's need for enough weight—enough commitment and competence—at the center to accomplish the organization's work.

We assume that people are in many different places in regard to spiritual life: some more disciplined, others more lax; some with an "owned" faith, others more tentative. There is a two-fold strategy implied—accept people were they are and invite them to grow. There is also an assumption that a parish is healthier when there is a critical mass of people proficient in the practices of faith. That more proficient group grounds the parish and creates a climate conducive to growth (Gallagher, 2008).

This is a mental model that serves to

replace two others not based in what "is." One ignores the differences among people—"we're all the same"—and a second would pretend everyone is fully committed and competent.

### Returning to Saint Paul's, Seattle

The Renewal—Apostolate Cycle was strengthened with a three-year cycle of experiential and participative educational modules and training members in spiritual practices. The Shape of the Parish model was used in formulating a strategy to strengthen the center while accepting people in all stages of their spiritual life. And the community, daily prayers of the church, and service elements of the system were made stronger.

### The Experience of Using OD in the Church System

Between the two of us we have trained hundreds of Episcopal Church parish leaders in this fusion of OD with pastoral/ascetical theology in CDI or the Shaping the Parish programs. The programs include both formal and informal assessment processes. There are three phrases we have heard again and again:

- » "This is hard." That is said early in the training programs. Part of it is that the programs are demanding and require focused time and energy. But as the participants begin to engage change projects in the parishes, we hear about the need for persistence, wisdom, and, at times, courage. They talk about how complex interventions are and how challenging the work is intellectually, emotionally, and spiritually.
- » "This works!" That's the second statement we hear about one year into the training. The feelings of being overwhelmed and disoriented have passed. Interventions have been planned, implemented, and reflected upon. Some of the "this works" response rises out of a sense that the parish system is more understandable. They are learning to look under the tip of the iceberg. The other part is they are beginning to see some initial success or, if not

success, some understanding of why their interventions did not go as they intended. As the training comes to an end we hear comments about changes in parish culture—more trust, more openness, and more competence in the core practices. As parishes send additional teams through the training that sense of “this works” increases and becomes more internalized; the competency is now within the parish, rather than simply within those attending.

» “This is inspiring.” This one comes later; maybe during the last workshops, sometimes after that. People have seen themselves, others, and their parish change. It is a kind of reasonable hope about their future together. A confirmation of the investment they have made.

The phrases we have heard from others are also our own. It is what we experience. Of course that is not unique to church systems. Heyne knows it from her work in the financial services industry and Gallagher knows it from his work with a variety of nonprofits.

### Conclusion

The use of both church-specific and secular OD models highlights the fact that the parish is a nonprofit organization like any other nonprofit, with many of the same issues and dynamics. It is also unlike others in its purpose, dynamics, and primary task. This provides a reality orientation and an energy catalyst grounded in connecting to the parish’s mission in light of its actual functioning and actual potential.

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Michelle Heyne and Robert A. Gallagher have developed approaches using OD in religious systems that, in combination with the church’s disciplines of pastoral and ascetical theology, have offered an innovative approach grounded in the church’s tradition. Heyne’s day job is as a Managing Director with Precedent Consulting, providing OD-based consulting services for financial services companies. Gallagher has moved between OD work with church systems and a variety of nonprofit organizations in the fields of affordable housing, domestic abuse, and poverty law. Heyne has received certificates from the NTL OD Program and the Church Development Institute. Gallagher has an MA in OD from Goddard College. His core faculty person was Elsie Cross, then president of NTL. Heyne can be reached at [michelle@precedentconsulting.net](mailto:michelle@precedentconsulting.net) and Gallagher at [ragodct@gmail.com](mailto:ragodct@gmail.com). Their web site is [CongregationalDevelopment.com](http://CongregationalDevelopment.com). On that site you can find PDFs on the models mentioned in this article; see the section “Understanding from Within.”