

Learning and Transformation

RESOURCES FOR CONVERSATIONS
FROM THE TEXAS METHODIST FOUNDATION

NEXT STEPS IN THE WILDERNESS REHEARSING OUR PATH IN ORDER TO MOVE FORWARD

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"All who wander are not lost." I am not sure whether this quote was spoken to or by Bilbo Baggins in J.R.R. Tolkien's *Fellowship of the Ring*, but it resonates with truth. Baggins is the hobbit who, in comfortable middle age, is hired in spite of himself as a "burglar" by the wizard Gandalf and 13 dwarves led by their king Thorin Oakenshield on a quest to reclaim the Lonely Mountain and its treasure from the dragon Smaug. All the stuff of legends far from Christian history, doctrine and practice. Nonetheless, it is a story about being of a mature age (personally or institutionally) when things should be settled and yet be called into a quest, not as warrior but as burglar (one who must operate outside of the rules) to recover a thing of great value that has been lost. There is something about a good quest story that steps easily across boundaries from literary fantasy to institutional reality, from storied exploits to actual challenges. *All who wander are not lost*. Quests require wandering in order to advance. It is in the wandering that new discoveries are made and old assumptions put to rest.

I want to argue that many of our leaders in the United Methodist Church have been wandering with good results. We are not where we were in 2007 when the global church gathered all of the bishops, extended cabinets, and lay leaders of the church to a Lake Junaluska summit to begin a new missional quest. It has been a wilderness experience all of the way – as any good quest should be. The changed mission field – local, national and global – is our new chaos, our wilderness to be crossed, in a quest for both being and making disciples who can change the world to reflect more closely the dream that God has for God's creation. Quest, chaos, wilderness. It is the ongoing story of how God renews creation. In fact, it is in just such places as quests, chaos and wilderness that the faithful and the miraculous saving hand of God is experienced. It is, as it were, in just such places that God does God's best work.

And the work is going well. It is tempting to use the 2007 Lake Junaluska gathering as the beginning point of the shifting focus and leadership of the church. However, a gathering such as happened in November 2007 cannot be planned if some leaders do not already have both the passion and wisdom to see that things can be different – and are already working to make it so. So a report of the learnings provided by our wilderness wandering begins not five years ago but 10 or 15 years ago as leaders began to turn their hands from management to leadership, from membership to discipleship.



Nonetheless, old ways die hard. The discomfort caused by any quest prompts grumbling and complaints from those who don't see the possible new future or who would just rather not take the trip. In fact, over the past 10 to 15 years, scarcely a measureable portion of the United Methodist denomination has seen the need, or developed the skills, for a quest to recover faithfulness. One personal observation from the 2012 General Conference is that much of the proposed legislation, the debates in both legislative and plenary sessions, and the decision-making was done by good people who have not yet participated in or matured in conversations about the new reality of the mission field that requires us to change our institutional ways. Old conversations restrict us to old ways and much of the church still must be invited into the new conversations prompted by the wilderness wanderings of those who have already begun to move ahead.

The dilemma, however, is that complaining, resisting, and clinging to old ways appear to leaders as immediate problems to be solved so that even those who have wandered most productively forget what they have found and turn back to negotiate anxiety and address old politics and problems. Like all good wanderers we must constantly look at the map to remember how far we have already come in order to take the next steps with any confidence. When the immediate moment feels confused we need first to remember how far we have already come and what we have already learned.

This present monograph is offered as a perspective on how far we have journeyed in our understanding and practice of leadership in our mission field wilderness. The monograph is in two sections.

The first section is an edited version of an earlier monograph entitled "Leadership Under Constraint: What Does It Mean to Be Asked for Leadership in a Managerial Institution?" This earlier monograph was written in 2006 as a conversation resource for the initial gathering of the South Central Jurisdiction Bishops Conclave (a gathering of the active bishops from the jurisdiction) hosted in January 2006 by the Texas Methodist Foundation of Austin, Texas. The SCJ Bishops' Conclave was a unique event in which active episcopal leaders were gathered for peer learning and accountability. Time was given to building community, shared learning, and an intentional review of leadership practice. From that initial experience, the SCJ Bishops Conclave has continued to meet two times each year for 48-hour gatherings. Later, in November, 2007, this earlier monograph was one of the documents chosen for distribution to all participants of the global gathering of bishops and extended cabinets held at Lake Junaluska and was used to help shape the ideas and language of that formative event.

The second section of the current manuscript is an addendum that serves as a rehearsal of primary discoveries and practices developed in these recent years of wandering in a changed mission field. Deep institutional change is a long-term process that requires foundational rediscovery of identity and relationship. Walter Brueggemann has suggested that each time Israel (and others in Christian history who followed) went into the wilderness where the known way of life was stripped away, the people had to answer two questions again:

How will we now be with God?

How will we now be with one another?

Such discovery takes time and memory. Israel did not so much follow a map in the wilderness as create one. Creating such a map requires memory – memory of who we are, where we have come from, what steps have been taken along the way, and what has been discovered to be of value and must not be forgotten. So we are now at a time in which leaders need to draw the map of the known part of the wilderness in order to remember what they have already learned so that they can move further ahead. Together these two sections of the present manuscript are offered as a statement of where we are at the beginning of a new quadrennium in 2012.



SECTION ONE: Leadership Under Constraint

What Does It Mean to Be Asked for Leadership in a Managerial Institution?

Introduction

Every discipline has its perspective but not the whole story. Even if we were to understand only the individual human being, biology, psychology, theology, sociology, and anthropology all have a contributing perspective without being able to define the whole either singularly or collectively.

What follows is a perspective on the current setting and challenge of leadership within the United Methodist Church from the lens of systems theory and organizational sciences. Other voices and other disciplines need to be blended into this perspective in order to speak more fully and faithfully. This paper, however, does not seek to offer a full explication of leadership needed within the church for this time. Rather, the perspective in this paper has been kept narrow in order to bring clarity to the organizational and systemic challenges that currently face episcopal leadership.

Bishops in the United Methodist Church and the staff and leaders of their conferences are today being asked to provide new direction for the denomination that wishes to steer away from trends that have dominated past decades and that are felt to have weakened the denomination. Bishops and district superintendents, however, are being asked for leadership in a managerial system. It is a task for which the denomination has not trained its leaders. It is a task that, if well done, will not be met with full appreciation but will be challenged by resistance in many quarters—not least of which will be the national/global church.

The United Methodist Church as a Managerial System

The United Methodist denomination has been identified as a “managerial episcopacy” by Edward Leroy Long in his 2001 study of the polities of a range of denominations and expressions of the Christian faith. Long looks at three denominations with episcopal heritage in which the biblical principle of oversight (*episkope*) is located in leadership persons and is a means of system organization. Long distinguishes United Methodism as a managerial episcopacy as distinct from the Roman Catholic “monarchical episcopacy” and the Episcopal “pastoral episcopacy.” Each of these episcopal systems defines different roles and responsibilities for leaders. When describing the United Methodist Church, Long states:

... a managerial episcopacy is concerned primarily with making the church function effectively. It views the office of bishop in functional terms, as involving managerial skills, rather than giving it theological dimensions or sacerdotal significance.ⁱ

This does not imply that the role of the United Methodist bishop does not have theological or sacerdotal functions and responsibilities. Indeed the United Methodist Church does look to bishops within the United Methodist denomination to assume teaching and priestly roles. Nonetheless, Long argues that the governance pattern of the United Methodist Church was heavily developed “in an era in which efficiency was becoming a desired goal in the culture as a whole, when the business world was developing complex logistical systems, and when decisions, more than heritage, were seen as influential in human affairs.”ⁱⁱ He argues that the defining role of the United Methodist bishop and of denominational leadership is managerial as symbolized by the location of episcopal offices in office centers rather than in congregations or cathedrals and by the episcopal attire which is more commonly of the same order as ministers in full connection than defined by symbols of the office.



Like all managerial systems a managerial episcopacy has checks and balances on authority to establish managerial boundaries that are not always encountered in other leadership systems. Such checks and balances within United Methodism include:

- The primary role of bishop as limited to the interpreter of polity (*Book of Discipline*).
- A limited assignment to an annual conference giving only tenuous authority.
- Non-membership in the annual conference that allows the bishop to preside but without vote.
- A Council of Bishops that does not designate a “head” for the entire church.
- A system for setting fundamental denominational policy through the legislative powers of a representational body
- A Judicial Council that serves as a “watchdog” tool for appeals of episcopal or conference decision-making.
- Bishops’ subjection to conference and jurisdictional points of professional and spiritual evaluation (i.e., conference and jurisdictional Episcopacy Committees).

Boundaries and accountability, of course, are healthy in community. It is important, nonetheless, to recognize the limits that they place on leadership, particularly when practiced within a managerial system.

Management and Leadership

The primary point is that the present United Methodist Church has inherited and developed a managerial system from which it now asks for clear leadership. It is true that management and leadership are not disconnected, and no organization can live with one of these functions to the exclusion of the other. Indeed, all living systems need management and leadership in a continuous and complementary relationship in order to maintain balance and health while also negotiating change and development. While complementary it is important also to note that management and leadership address distinctly different needs of an organization. One manages the present, the other defines the future. One provides stability, the other change. One provides smoothness and efficiency, the other disruption. One provides comfort, the other anxiety.

A classic distinction made between management and leadership is that each seeks to answer a different question.ⁱⁱⁱ Management seeks to answer the question: “Are we doing things right?” This is a question of appropriateness and efficiency; pursuing this question provides security and stability for the organization. In the local church, “Did anyone order enough candles for the Christmas Eve candlelight service?” is clearly a managerial question. If the candles were ordered, the service goes smoothly. If not, there are disruptive consequences. This does not infer that managerial questions are trivial. Indeed management is commonly based on experience—good management practices avoid many problems while providing stability and security. Management systems also provide standards of practice for workers and participants to follow. Note, however, that managerial questions and managerial leadership assume that there is a “right” way for something to be done and that the appropriate strategy is to replicate what was done and what was seen to be right in the past.

Leadership seeks to answer a very different question: “Are we doing the right things?” This is a question of purpose and meaning and is often experienced as disruptive. A well-formed leadership question does not increase efficiency but creates disruptive challenges that cause the system discomfort by requiring inquiry, learning, and making choices. In doing strategic planning work with congregations, I commonly use three leadership “formation questions.”^{iv}



- Who are we now?—the identity question
- What has God called us to do or to be now?—the purpose question
- Who is our neighbor now?—the context question

Such questions are difficult to pursue because they raise to a conscious-level investigation of what has usually been assumed as known. Such questions require active learning to make faithful choices about the future. For example, “What is the purpose of an annual conference?” is a leadership question that causes disruption and requires active decision making about the future goals and uses of the conference’s resources.

The Paradox of an Established Management System

It is common, if not axiomatic, for established organizations to request leadership (which prompts disruption and anxiety) only to resist it and reward management (which maintains stability and security) instead.

Leadership

The tension between the interrelated functions of management and leadership is heightened in a time of great change when old practices do not serve well and when new directions are not solidified. In such a time what constitutes appropriate leadership is questioned and contested. Does the leader focus the attention of the group on answers or on questions? “Imagine the difference in behavior,” writes Ron Heifetz, who served as director of the Harvard University project on leadership, “when people operate with the idea that ‘leadership means influencing the community to follow the leader’s vision’ versus ‘leadership means influencing the community to face its problems.’”^v

Living without clear answers and expectations (such as what it means to be a *good* pastor or a *vital* congregation) creates anxiety and discomfort in which people turn to the leader with the expectation that he or she will reduce the anxiety by providing clear direction. This is the assigned role of the singular leader who is hoped to and expected to be able to provide answers and calm fears. A leader with a clear vision is expected to galvanize followers to action—if not for great purpose, at least for reduced anxiety. We are familiar with the idea of the “lone-ranger” leader, the person who single handedly seems to come up with needed answers and clear directions. We are, however, also coming to terms with the reality that such leadership is rare and perhaps even inappropriate, if not impossible, in a complex time of deep change. Nonetheless, people seek the solitary leader who can thus calm fears. The temptation to want to play such a role as leader is constantly present for those given leadership responsibilities.

What we are less familiar with—or sensitive to—is the way in which leaders in complex organizations are pulled into the singular leader role despite being surrounded by others who form a leadership team or administrative structure. Deferral to the singular or highest status leader in this setting is identified by Jim Collins, former faculty member at the Stanford University Graduate School of Business and current management researcher, as the “genius with a thousand helpers.”^{vi} The system may be more complex, the number of people involved may be larger, but the wish for someone to “make it right” does not subside, even in the heart of the leader who would like to be able to bring order and calm to a chaotic time. The temptation of the singular leader, either as the lone ranger or as the genius with a thousand helpers, limits the creativity and the inventiveness of the organization by creating dependence upon the limits of one individual to originate or sign off on all ideas about moving into the future.



The search or desire for a singular leader is commonly centered on the need for clear answers in an anxious time. This is Heifetz's first alternative of leadership in which he speaks of leadership as "influencing the community to follow the leader's vision." In arenas where there are clear problems and clear answers, this is a fully appropriate role for leaders to play. In places and times when clear answers are not available, however, it is the second alternative that Heifetz proposes as holding hope: "leadership as influencing the community to face into its problems."

The Constraints of a Managerial System

In the current tension between management and leadership, it is important to become familiar with the assumptions and demands of management in order to understand the natural resistance that makes leadership difficult. Among the foundational assumptions of management are:

- A commitment to orderliness
- Replication and sameness. For example, districts are assumed to be smaller replications of the structure and purpose of the annual conference, which itself is a smaller replication of the structure and purpose of the national church. District superintendents are assumed to have the same roles and responsibilities (and even exhibit the same passions for ministry) despite the differing needs of their own unique districts.
- Checks and balances (see above)
- Centralization. Authority is located in the primary governing body, and any person or part of the organization is not readily given authority to act on local issues. (For example, decision making is located in the appointment cabinet, and a great deal of time and energy are given to sharing information and including all members of the central body in debate and decision making without concern for their involvement or investment in the issue.) While practices of centralization provide a good deal of alignment within the organization, they also constrain and slow the amount of work the organization can do and produce rigidity rather than agility in the organization's ability to respond to change.

Managerial systems turn to regulatory practices in times of great change as a means of fulfilling the assumptions noted above. In a 1992 essay, Craig Dykstra and James Hudnut-Beumler offer three metaphors for the development of American denominations: from constitutional confederacy (1780s) to the corporation (1830-1860s) to regulatory agencies (1960s . . .).^{vii} They note, as precursors to the present regulatory mode of denominations, the impact of the breakdown in the consensus between the national church and the people in the pew; the development of "cottage industries," which began to replace the role of the national church as the primary provider of goods and services to the congregation; and the onset of cultural individualism, which gave freedom to every congregation to behave individually. The response of denominations, claim Dykstra and Hudnut-Beumler, was to become more regulatory primarily because regulatory mechanisms work well and are "less expensive" than market solutions or system-wide negotiations.

The dependence upon regulatory responses should not come as a surprise since it is a cultural response to the messiness of deep change as experienced by an orderly and managed generation. During the same time period that books of polity such as the Presbyterian *Book of Order* and the United Methodist *Book of Discipline* grew from pamphlet and small-book size to large complex volumes more easily managed on CD discs, the Internal Revenue Code and healthcare regulations and practices have grown exponentially through continuous legislation. They are systems that have become rigid through the imposition of accumulated rules. The impulse to control through requirements, rather than provide clarity and tidiness, in fact creates a complexity that further constrains and inhibits the movement toward change. Middle-judiciary executives in a number of



mainline denominations have expressed their concern that as the need for new ideas and new structures increases within their denominations, the primary response of national offices and national denominational staff people has been to request more reports and increased compliance (i.e., additional reporting and regulation). The need to control and regulate has the tendency to make change more difficult without adding any agreement or coordination to the efforts of change.

Technical versus Adaptive Work

In his study of leadership, Heifetz offers new insights and tools to the present generation of leaders who are faced by a changed environment and a new mix of challenges. In particular he differentiates between *technical* and *adaptive work*, each of which must be addressed by the leader.

Technical work is the application of known solutions to known problems. This is clearly managerial work and depends upon one of the most highly developed skills of managers—problem solving. The manager identifies the problem (and, by building consensus on the very identity of the problem, already has moved the system toward solution and change); identifies the alternate options available to address the problem (brainstorming); chooses the most likely alternative (decision making); and moves to implementation (action). The appropriate response to a known problem in technical work is *action*. Technical work, problem solving, is effective and works well. However, it works well *only if there is a problem*. The dilemma in the current moment is that leaders are often confronted with new questions and situations that do not lend themselves to old assumptions and practices. They cannot appropriately be addressed as known problems. They require new learning.

Because technical work and problem solving have been the primary tools of management for the past several generations, it is difficult for bishops and district superintendents in the current situation to resist searching for answers and enter into the more complex realm of learning. A well-proven adage of systems is that whenever a system does not know what to do, it does what it knows. And so leaders overuse their problem-solving skills even when confronted with a changed situation that cannot be defined as a “problem.”

Heifetz offers a second arena for leadership, which he calls *adaptive work*. Adaptive work is quite different from the problem-solving activity of technical, managerial situations. Adaptive work “consists of the learning required to address conflicts in values people hold, or to diminish the gap between the values people stand for and the reality they face.”^{viii} It is in this arena that Heifetz offers the alternative definition of leadership as “influencing the community to face its problems.” The appropriate response to adaptive work is not *action* (problem solving), it is *learning*. In order to address an adaptive situation, someone must learn something. In fully adaptive situations of deep cultural change it is common for everyone, including the designated leader, to need to learn.

When a bishop provides faithful leadership to move a conference to address a discerned call or need but conference leaders—the Board of Ordained Ministry or the Episcopacy Committee—pulls the bishop aside out of concern for people who feel left out or are displeased, it is an adaptive situation in which there are conflicts between the values people hold and the behaviors that they practice. When there is a widely shared call for excellence in pastoral leadership but the poorest performing or poorest motivated clergy still receive an appointment, it is an adaptive situation where there are conflicts between the values people express and the actions that they take. When, in a time of concern over church growth, large congregations in demographically supportive environments grow naturally yet the majority of conference attention and resources remain focused on the redevelopment of recalcitrant churches, it is an adaptive situation—conflict between the values people hold and the actions that they take. When the denomination claims the making of disciples (a focus on the change within the *individual*) is the driving mission but asks only for reports on the state of the congregation (a focus on the change within the *institution*), it is an adaptive situation. When bishops, district superintendents, and conference staff are challenged to provide leadership



(complete with messiness and anxiety) but are rewarded only for management (orderliness and institutional harmony), it is an adaptive situation where there are conflicts between the values people hold and the actions that they take.

The task of the leader is not to pick up the daunting challenge of somehow finding the right answer or practice that will resolve these conflicts between values and actions. The task of the leader is to help the people face the adaptive situation and learn. As in all difficult moments, the starting point is finally to name the tension or conflict between expressed values and actual behavior. Not to name the tension is to remain trapped in a double bind.

Much more than a clichéd expression, a double bind is a debilitating trap for leadership. In his provocative work on the nature of order, anthropologist Gregory Bateson identified three essential elements to a double bind that must be present if the person is to be trapped and remain incapacitated:^{ix}

1. The situation or message must be important and cannot be ignored.
2. There have to be at least two competing and contradictory messages in the situation that cannot be held simultaneously in agreement.
3. The leader is not allowed to comment on the contradiction that is present and does not allow resolution.

For the leader to be faced with all three elements is to be constrained and to remain ineffective as long as the double bind remains unspoken. It is noteworthy to remember that Bateson is perhaps best remembered for his development of the double-bind theory of schizophrenia, a specific application of his study of paradox in communication. It is a schizophrenic situation. To be asked to provide leadership in a managerial system is a clear double bind designed to undercut change and faithfulness unless the competing values and behaviors are named and the people are helped to face the adaptive situation in search of new learnings.

Adaptive work is not tidy. In his theory of change from a systems perspective that takes into consideration the insights of chaos theory, organizational consultant John Scherer notes that in order for change to be birthed, two “parents” must be present—pain and possibility.^x There must be a discomfort sufficiently strong to make the people want to be different and a possibility promising enough to support the people through change. Walter Brueggemann once commented that the central task of leadership is to manage the hopes and the fears of the people. Indeed managing hopes and fears—pain and possibility—in a congregation, a conference, or a corporation is a spiritual task of great faithfulness. Scherer demonstrates that if the leader can surface the appropriate pain, hold clearly the possibility of what can be, and help people let go of old assumptions, then the people will enter a stage of chaos—the truly creative environment where change happens. It is a change that the leader can neither anticipate nor control. Turning first to contemporary literature, this creative place of chaos is described in Michael Crichton’s novel *The Lost World*. The character of Malcolm is the voice of systems theory in a novel of prehistoric dinosaurs that are cloned from ancient DNA to live in a contemporary jungle. Malcolm explains:

Complex systems tend to locate themselves at a place we call “the edge of chaos.” We imagine the edge of chaos as a place where there is enough innovation to keep a living system vibrant, and enough stability to keep it from collapsing into anarchy. It is a zone of conflict and upheaval, where the old and the new are constantly at war. Finding the balance point must be a delicate matter—if a living system drifts too close, it risks falling over into incoherence and dissolution; but if the system moves too far away from the edge, it becomes rigid, frozen, and totalitarian. Both conditions lead to extinction. Too much change is as destructive as too little. Only at the edge of chaos can complex systems flourish.^{xi}



But along with being a literate people, we are also a biblical people so it is not difficult to turn to our own sources to realize this same truth. The biblical word commonly used to express chaos is “wilderness,” which is the creative place where people are changed. This is where the Israelites wandered with Moses for forty years during which time they were transformed from slaves into a nation. Without the wilderness, without the wandering, without the chaos that made them trust in God, they would have arrived in the promised land as unchanged slaves with no purpose other than to escape their oppressors and no other identity than as an oppressed people. John the Baptist appeared in the wilderness with the promise that there could be a straight path. The wilderness is where Jesus was sent to put away his role of carpenter in order to begin his public ministry as Son of God. It may be helpful to recall that the wilderness is required. In Mark’s gospel, as soon as John baptized Jesus in the Jordan and the voice from heaven proclaimed Jesus as God’s son, we are told that the Spirit immediately *drove* Jesus into the wilderness (Mark 1:12). Wilderness, chaos, change is neither tidy nor comfortable, which underscores the true difficulty of adaptive leadership in a system designed for the comfort of problem-solving management.

The Question of Purpose

One of the foundational observations of historian of science Thomas Kuhn in his study of scientific developments was that when a paradigm shifts everything goes back to zero. Kuhn writes, “The transition from a paradigm in crisis to a new one from which a new tradition of normal science can emerge is far from a cumulative process, one achieved by an articulation or extension of the old paradigm. Rather it is a reconstruction of the field from new fundamentals.”^{xii} That is to say that nothing can be assumed. Everything must be challenged.

This was the experience of the Dutch Reformed Church in South Africa over the past generation. For a short period of time I had conversations with several congregational consultants from the South Africa University of Stellenbosch who sought help in learning how to engage congregations in visioning. Their congregations did not know how to raise questions of purpose and discern call. The consultants recognized that their congregations did not know how to vision because they had not had the need to raise such questions in the past. In many, if not most Dutch Reformed congregations, the cultural system of apartheid provided the purpose for a congregation to be the place where cultural and colonial values were to be maintained and enforced. This was all the purpose that many congregations needed, and it went unquestioned. When apartheid was dismantled, Dutch Reformed congregations for the first time had to ask the foundational but unfamiliar and disorienting questions of purpose: What are we now called to do? What are we now to produce? It has been difficult for many.

Some would argue that the mainline Protestant church in North America has gone through a similar paradigm shift in which the congregation (as well as the middle judicatory and the national church) lost its place as spokesperson for a dominant culture. The church now needs to find its new place in a complex network of competing and often unchristian cultural values where there is acceptance of a wider variation of expressions of the Christian faith and where a newly multi-faith nation is developing. Like the South African experience, everything goes back to zero, and the fully adaptive question of purpose becomes primary again. Such adaptive questions of purpose now also belong to the national church and conference as old assumptions prove limited and fall away.

We now need to ask again:

- What is the purpose of the national church and the annual conference?
- Who is the “client” of the annual conference—the national church, the clergy, the congregation, or the mission field?
- Is the vitality of congregations to be measured by institutional standards or by the changed lives of individuals?



Questions of purpose can be asked in multiple ways but are of central importance at a time of deep change. Raising and helping people face such questions is fundamental to faithful leadership. Without clarity of purpose we do not know to what to give ourselves, and so we settle for giving ourselves to what we know.

The Need for Clear Outcomes

A well-known adage attributed to Edwards Deming, the industrial consultant credited with turning around and rebuilding Japanese manufacturing following World War II, is that a system produces what it is designed to produce. If you want something different, you must change the system.^{xiii} Deming's significant contribution was to develop principles for the needed change in a system. In part he pointed out that the natural temptation and the more common response when there is stress in a system is simply to work harder with the hope that it will make the wanted difference. He points to the futility of setting goals as a way of motivating people (i.e., setting a goal of a 10-percent increase in average attendance at worship in the next year), because without changing the system any increase or decrease related to the goal is simply the product of random variation within the limits allowed by the way the system is designed. He points to the limits of mandatory training—"fixing people"—(i.e., increased standards for ordination, legislated training for clergy and laity, redevelopment training for all congregations), because the newly trained, "fixed" people still work within the designed limitations of the unchanged system. He discourages the use of performance evaluations because of the arbitrariness of measuring performance within a system over which the person has little or no control. Until changes are designed into the system itself, what is produced continues to remain unchanged—except for the random positive and negative results that are already designed into the upper and lower control limits of change that any system accommodates but cannot control.

One sure key for changing a system to get different results depends upon *clarity of the intended outcome*—what the system, in fact, is expected to produce. The reality, however, is that many systems do not know what they actually produce. That seems especially true of voluntary associations such as congregations and conferences where, in the current cultural moment, there is little consensus about their proper purpose.

Without clarity of outcomes it is not possible to know how to change the system to produce different results. Take for instance the example of a restaurant. A quick assumption may be that the outcome of a restaurant is food. But generic and fuzzy outcomes do not offer help for the leader to know how to design a specific restaurant to get the clear outcome wanted. Consider two very different but more sharply focused outcomes possible for a restaurant. One desired outcome may be a memorable dining experience. If that is the outcome, then the owner must design a fine gourmet restaurant. Yet another equally viable but very different outcome for a restaurant may be quick and inexpensive meals. For this, the owner would have to design a fast food restaurant that would be very different from the fine restaurant. For example:

- If quick inexpensive meals are the outcome, then hiring priorities for staff focus on the manager who can keep the system rolling efficiently no matter who is flipping the burgers. But if a memorable dining experience is the outcome, then hiring priorities for staff focus on the chef who will prepare food that demands notice and will become the topic of table talk.
- If quick inexpensive meals are the outcome, then standardized ingredients that do not change and do not interfere with the efficiency of production are used. But if a memorable dining experience is the outcome, then the menu changes to reflect the finest ingredients the chef can find. A note is put on the menu that preparation will take even longer than usual, which makes the customer even more appreciative of the product.



- If quick inexpensive meals are the outcome, then effectiveness is measured by the number of meals sold. A thirty-second timer is placed above the head of the worker to help keep delivery of the meal within a set time limit. But if a memorable dining experience is the outcome, then effectiveness is measured by counting the number of compliments to the chef, the number of repeat customers, and the food reviews in the local newspaper and regional magazine.
- If a quick inexpensive meal is the outcome, then the walls are painted with bold colors like red, orange, and yellow, and bright lights encourage customers to eat fast and keep moving. But if the outcome is a memorable dining experience, then sumptuous surroundings, attention to privacy at the tables, and a background setting of music become important to encourage the customer to linger and enjoy the “experience.”

The contrast could continue, but in each case it is the difference in the clear outcome that determines the appropriate way to design the system. It is the outcome that determines what resources are used or not used, where attention will be focused, and what measures of performance will be evaluated. As Stephen Covey, author of *The 7 Habits of Highly Effective People*, writes, one must “begin with the end in mind.”^{xiv}

Without clear outcomes it is difficult to know what is to be done, where resources are to be placed and what is to be measured. A clear understanding of the purpose of a congregation, conference, or denomination, therefore, is critical to knowing what is to be produced.

Conferences are complex organizations working with multiple demands and so will find their fingers necessarily in many tasks at some time and at some level. Without a clearly identified and articulated *primary outcome*, however, the conference leaders will not know how to hire and deploy staff; develop budgets; direct prayers and attention; provide leadership development and placement; and do evaluations to make the primary outcome happen. Without a clear primary outcome, resources and attention more commonly get spread and diffused across the multiple and often competing voices in the system and the system remains unchanged and ineffective.

One additional note—without clear outcomes in which we know what we want to produce, we do not know what to measure in order to track our success and effectiveness. Not knowing what to measure as an *outcome* in a system commonly leads to measuring the *inputs* directed into the system. The hope is that putting enough resources into a system will produce something of value out the other end. So clergy measure the hours and the number of days, the meetings attended and boards “sat on,” books read, and sermons preached as evidence that they have put a lot into the system. So congregations and conferences measure the number of dollars gathered or spent, the number of staff employed, and the number of programs offered as evidence that they have put a lot into the system. Without clarity of what we are to produce, we end up measuring not the output produced, but the resources consumed.

Making a Critical Distinction

Resources and outcomes are easily confused. An outcome is a difference to be produced. A resource is something needed to accomplish that difference. A common way for me to work with congregations is to pursue the question of what they believe God calls them to make different in the next 5 years.

Congregations frequently confuse significant resources such as budget, staff, or a building as outcomes. This confusion, for example, often lies at the heart of the familiar depression that congregations experience at the completion of a new building. Consider how a congregation, in getting clear about its call and purpose, might determine that it is called to connect more deeply with its surrounding community. In doing the homework, the leaders find that they will need a large gathering space and



recreational facilities, which require a new building. The new building is a resource needed to address the outcome of ministry with the community. However, the designing, funding, and constructing of the new building require such energy and attention that the building's completion begins to appear to be an outcome of its own. Once the construction is complete, the congregation may commonly experience depression because of their tiredness, but more importantly because they produced a significant "outcome" but nothing changed—their ministry simply continued on as it was. It is likely that the leaders, in their work on the new building, lost sight of their real outcome of community connection. They forgot that there was a reason for which they needed the resource of a new building.

Some resources such as staff, facilities, budgets, and structure are expensive and demanding and can easily be construed as outcomes within themselves. Conference leaders must likewise be clear about what are outcomes and what are resources. Because of their prominence, expense, or importance within the conference, confusion about being an outcome or resource often revolves around:

- Conference structure
- Conference staff
- Compliance with polity
- Clergy—their preparation, certification, deployment, resources, and care
- Apportionments
- Congregations
- National church programs and requirements

To confuse resources and outcomes can produce situations in which leaders become poor stewards of resources, mistakenly protecting them rather than using them for mission. As William Sloane Coffin observed, "Most churches don't like to be rocked; they prefer to lie at anchor rather than go places in stormy seas. But that's because we Christians view the church as the object of our love instead of the subject and instrument of God's."^{xv}

Challenging and Changing Norms

The key differentiating question to distinguish between managerial/technical work and leadership/adaptive work, writes Heifetz, is "Does making progress on this problem require changes in people's values, attitudes, or habits of behavior?"^{xvi} As noted above, technical work is the application of known solutions to known problems, and it can be done within the boundaries of the values, attitudes, and behaviors already present in a managerial system. Adaptive work, however, requires learning—new ideas, new values, new behaviors—and it depends upon a willingness to challenge and change established norms in order to provide an environment in which the new can grow.

Norms are the established ideas, values, and behaviors that are rooted in organizations and determine how the organization works or does not work. Norms are the informal, usually unwritten, agreements and rules of the organization. For example, the "rule" of not taking a cup of coffee into the sanctuary of a congregation may not be written anywhere, but the new member who mistakenly carries coffee there quickly finds out that it is not to be done. Having already agreed upon a norm such as not



carrying coffee into the sanctuary, the congregation usually does not have to revisit or rehearse the agreement; it is simply enforced. Not having to rehearse the rule or agreement allows the norm to remain hidden yet still function powerfully as a determinant of action. In fact, the reason organizations establish norms is to avoid having to rehearse decisions time and time again. Once the norm about coffee is established, members do not need to talk about it; they need only to frown at the person who brings Starbucks into sacred space. The organizational advantage of hidden norms is efficiency. Not having to rehearse what already has been decided frees the organization to do new work that still will be guided by the established norms. Norms are tacit. They operate below our conscious attention. They form limits and boundaries along with efficiency and stability.

Because they are tacit, norms become deeply embedded in our ideas, values, and behaviors and are both powerful and difficult to change. They are very powerful tools that protect and stabilize the organization but can also produce rigidity and resistance to change. The presence of coffee in a sanctuary may only be about the expense of cleaning carpets. The norm, however, also may be saying something quite powerful about decisions regarding appropriate behavior in sacred space. The consequence of having such norms about appropriate sanctuary behavior is significant. With heavily enforced norms it is neither trivial nor inconsequential that congregations seeking change in forms of worship have embattled conversations over coffee cups, plastic water bottles, sneakers instead of shoes on the acolytes, guitars instead of organs, or clergy dressed in business casual instead of robes. These may all be tests of deeply held agreements that are, in fact, hard to challenge because the norms themselves are not easily seen.

Movement on changing worship practices to serve changing generational needs, however, depends upon leaders being able to change established norms. Similarly, movement on adaptive issues in the conference requires challenging and changing some deeply established norms that have guided past generations of leaders, congregations, and practices. For example, deep change in a conference or in the national church may need to challenge some or all of the following norms that can be described as assumptions:

- *The assumption of scarcity* in which we believe we have limited resources over which leaders, subgroups, and programs must compete. The assumption of scarcity constrains us to give attention only to those resources that are limited such as people, money, and energy. This assumption blocks attention to our access to less limited resources such as prayer, time, creativity, and passion.
- *The assumption of egalitarianism* in which we assume that “all”—all congregations, all clergy, all lay leaders, all members, all agencies, all committees, all social justice issues, all subgroups—must be given a fair share of resources. Coupled with the assumption of scarcity, this assumption creates a competitive arena in which importance and effectiveness in the system is measured by the amount of resources garnered, not by what is accomplished with them. This assumption is also emboldened by the similarity to—but not necessarily the complementarity with—the gospel demands of inclusion as an issue of social justice.
- *The assumption of representative democracy* in which it is assumed that everyone has both a decision-making voice, as well as the responsibility to use that voice to represent the issues and concerns of the part of the system—the subgroup—with which the person is aligned. The mistaken use of the principle of democracy that includes all voices leads to assumptions that “if I say it, you must do it.” A representative democracy encourages participants to “represent”—that is to speak only for their part of the whole. Under this assumption, it is very difficult for leaders to speak about the mission of the whole and to align the parts as necessary to make mission happen.



- *The assumption of harmony* in which harmony in Christian community is mistakenly defined as agreement. Everyone is assumed to have the right to be satisfied. Dissatisfaction is seen as reason to challenge and stop leadership. While sometimes flip in his writing and humor, Wally Armbruster is also succinct. He notes that harmony is not everyone singing the same note at the same time. That is monotony. Harmony is when everyone sings his or her own note and then listens carefully to others in order to blend together.^{xvii} Under Armbruster’s definition, dissonance and dissatisfaction not only have a place in the system but provide a clear reason for people to work with one another creatively.
- *The assumption of entitlement* in which rights and access to resources are assumed. Congregations assume the right of survival and the right to access resources whether they demonstrate passion or potential for ministry. Clergy assume the right of appointment commensurate with lifestyle whether they demonstrate commitment or gifts and graces for ministry. Conference staff, programs, and agencies assume the right to be resourced whether they are effective in producing the results intended in their purpose.

Like all norms, these assumptions hold a history and a purpose that developed for natural and even necessary reasons. They come from decisions made at an appropriate time for appropriate cause. But, if not challenged, they also may now be experienced as constraints on leadership’s turning toward the new in the future.

Once again it is critical to assert the importance of outcomes. In each case it is difficult, if not impossible, to challenge a norm if there is no clearly identified outcome to provide purpose and reason and redirect the attention and resources constrained by the norm.

Leveraging Change

The dominant assumptions in most denominations and middle judicatories have been grounded in the idea that the church, the conference, or the denomination as a whole cannot move ahead until all parts are ready and able to move together. Much attention, therefore, has been given to “fixing” incompetent or unmotivated leaders; redeveloping recalcitrant congregations; or resourcing congregations, agencies, and committees that have slipped below the threshold of change. The effect has been to hold denominational leaders accountable for people and conditions over which they often have no control. The effect also has been to keep our denominational attention on our weaknesses not on our strengths, on our threats not our opportunities.

Yet there are people, congregations, and groups who do know how and who have the passion and potential for doing ministry in this changed and constantly changing culture. These people, congregations, and groups are leverage points available for producing known and clear outcomes. A lever is a tool to move something otherwise immovable, and a leverage point is where the tool is placed so that when “cranked,” it gives the most powerful result. While the conversation is still very much a part of ongoing adaptive learning, there is a growing consensus among those who work with congregations about where some of these leverage points are located and the variables that create growth and vitality.

For example, in a recent report on congregational growth from the Cooperative Congregational Studies Partnership of the Hartford Institute for Religion Research a number of variables or characteristics or variables were identified as correlative to growth and vitality of congregations.^{xviii} Such studies help to point to places and situations in which “the fields are ripe for the harvest.” Such variables or characteristics include:

- Downtown, central city areas as the new place for natural growth (which now exceed the growth happening in new and established suburbs)



- Congregations with an age of 20 years or less
- Congregations with a clear theological identity (very conservative or very liberal as opposed to congregations that see themselves as only somewhat conservative or liberal)
- Congregations with clarity of purpose, a clear motivating purpose
- Congregations that evidence a willingness to change
- Congregations with multiple worship services
- Congregations whose worship is characterized by being joyful, innovative and inspirational (characteristics that are less correlated with growth are thought provoking or filled with a sense of God’s presence; not related to growth is the character of being reverent)
- Congregations engaging in a variety of recruitment related activities
- Congregations in which the age of the primary leader is <50.

Surely this is a partial list of the conditions under which ministry can grow in new, natural, and continued ways. What is implicit in such research however is the reality that some of these conditions, variables or settings are resident in every annual conference and district and can serve as leverage points for growth and vitality. However, for any conference, presbytery, diocese, or synod effectively to use such leverage points, appropriate resources and attention need to be directed to them. This requires that resources and attention directed in other areas must be refocused. Redirecting attention and resources to leverage points in a managerial system, as well as choosing which leverage points are appropriate, is very difficult and requires:

- Clearly understood outcomes that provide purpose and reason to redirect attention and resources.
- The challenging of established institutional norms that would constrain the leader’s ability to redirect attention and resources.

The future is not without hope; we are not without adequate resources. However, the task of leadership is exceptionally difficult as we turn from the known and the assumed to address our immediate challenges.

Section Two: Rehearsing Our Path In Order to Move Forward

“The New Basics”

Having worked hard in the new wilderness, leaders have developed a number of “new basics” – priorities, perspectives, and practices of leadership on which hope for the future rests. These new basics do not replace the fundamental necessity of leadership being spiritual, working from a Wesleyan trust in grace and being accountable for Christian discipleship. Nor do these new basics shift the responsibilities of oversight that belong to the episcopacy and to those, who by extension, are also



responsible for the biblical practice of *episkope*. However, these new basics have proven to be necessary aspects of leadership in this current wilderness. Learning and leading from these new basics is a way in which God is reshaping the people to be faithful in a new and changed mission field. What follows is a simple cataloguing of these new basics. In each case, both theory and experience, though not recounted here, strongly suggest that these new priorities, perspectives and practices are not only appropriate, they are necessary to the current practice of leadership in our denomination. If the Israelites drew the map of the Sinai as they progressed so they could remember where they were and what they learned, so have we been drawing our own map that gives us evidence of where we are, what we learned, and what next steps challenge us.

Ten New Basics: What we've already learned in our wandering

1. The client is the mission

Perhaps the most central of the new basics learned by those who have responsibility for the operation of a denominational system and the deployment of its key leaders is the reality that the "client" they serve is the mission of the church. This most fundamental perspective is critical to all non-profits where leaders commonly struggle to understand whom they are to serve. For-profit organizations are very clear about their stakeholders (primarily their stock holders), and they understand they hold the business or corporation "in trust" for those stakeholders. In a non-profit organization, like a church or a denomination, the single and primary stakeholder for whom the organization is held in trust is the mission for which it exists. Who/what to be served in a church or denomination is the purpose of the church or denomination. The purpose (mission) of the United Methodist Church is to make disciples (people who are changed by the disciplines of following Jesus) who will then put their hands and their lives to changing the world in which they live – personally, locally and globally. This is the end to which we claim we exist.

This is a new basic, a changed perspective, because of our recent history from which we come. When the role of a leader is defined as a manager ("are we doing things right?") then the client is seen as the institution itself. Management takes on an internal perspective of fulfilling disciplinary requirements, denominational priorities and historic obligations. Those most directly served, and to be satisfied by managerial leaders, are the clergy, the congregations, and the operations of the organization itself. When the leader's role is redefined from management to a leadership function ("are we doing right things?") it is the external purposefulness of the mission that must be seen as the client. Clergy, congregations and the operations of the organization must be understood not as clients to be satisfied but as resources to be used.

The shift from the internal client of the people and parts of the denominational system to the external mission field client of the purpose for which the denominational system exists is exceedingly difficult because it is the clergy, congregations and the operations of the organization that the leader personally faces day in and day out. They are easily mistaken for the clients of the leaders attention and decisions (a mistake that is rewarded by those who receive the attention and decisions of the leader). It requires great discipline for leadership to understand and remember that the client is the purpose of the church and a steadfastness to see the people and parts of the denominational system as resources to be deployed, directed, and expended on behalf of the purposeful client.

While the shift of client from internal to external is difficult and painful for those who have a history from earlier managerial days, it is clear that serving the mission of the church is easily perceived by those who are seeking meaning in their own lives. In their ongoing research on religion in the United States, the Cooperative Congregational Studies Partnership reports that one of the strongest correlates for congregational growth is a congregation's clarity of purpose.^{xix} Knowing what we stand for and



directing ourselves and our resources to that end invites and includes a larger audience of people who are also wanting to have meaning and purpose in their lives which they can find in Christ.

2. The primacy of the mission field

If the mission is the client of the denomination, then it is the mission field that must receive primary attention. As described above, this requires putting clergy, congregations and the operations of the denomination in the correct position of resources to be expended to fulfill the church's purpose in the mission field.

The shift to the mission field presents new wilderness challenges for leaders because all mission fields are not the same. From jurisdiction to jurisdiction, from annual conference to annual conference, among regions within annual conferences, the mission field, that "corner of the Kingdom of God" assigned to the local people, is unique and distinct. While the mission of the church can be generalized, the mission field must be localized. Leaders must deeply understand the place to which they were sent and in which they have been given responsibility. Priorities must be set, changes determined, resources redirected to make the mission live and thrive within the particular setting of the local mission field.

The primacy of the mission field creates a number of tensions or obstacles for leaders. One is the issue of multiple memberships, as we are all part of a multi-layered global church. To the episcopal leader's assigned annual conference are added membership and accountability to a jurisdictional, a national and a global church, all of which appropriately have a different frame for trying to serve the mission as client. Such multiple memberships within the denomination now test the bonds of connectionalism given the recent history of a managerial church in which legislation, initiatives and priorities were set by global or national bodies that then expected conformity and full collaboration from all organizational levels below. The new primary orientation required by the local nature of mission fields now inverts the process where initiatives and priorities must be set from the organizational bottom and move up. This inversion creates tension between being faithful and effective in the mission field and being institutionally loyal which can carry an expectation that local needs and issues be sublimated to national or global directions.

Another tension created by the primacy of the mission field stems from the necessity that accountability only be local. A diffuse "connection" to a global agenda or institution allows many people and parts of a global denominational system to be "connected" by simple membership in the denomination without accountability for any difference to be made in the local setting. Such connection-by-membership is actually a diversion allowing attention to be distracted to national and global levels where effectiveness cannot be evaluated. Giving primacy to the local mission field requires that leaders and congregations redefine connectionalism – no longer being connectional by status of membership within the denomination, but now being connectional by effort and effectiveness of serving the mission (primary client) in the specific local setting (the mission field).

3. The necessity of proximate outcomes

Making disciples of Jesus Christ for the transformation of the world is the appropriate mission for the United Methodist Church. However, such a singular, eschatological end presents operational dilemmas. One of the dilemmas is noted in the discussion of the uniqueness of the mission field above in which all parts of the denomination do not have the same resources, same challenges, or even the same people to be introduced to discipleship.



The more challenging dilemma is that the larger part of our denominational system does not know how to make disciples. Our North American history since the 1800s is one of directing ourselves to make members, not disciples. We learned to change people's affiliation, not their lives. We are now asking congregational leaders, lay and ordained, to make disciples without first knowing how to practice discipleship. People schooled in membership cannot introduce others to discipleship. Our learned practice of social piety more commonly operated from a charity model in which needs were met but lives were not changed. Our denominational organization encouraged the replication of conformity rather than the individual path of discipleship as required in the biblical stories of Jesus. The difference between membership and discipleship is a deep change, requiring change in identity, organizational culture and organizational structure.

In the language of organizational gap theory, our church is now in a position in which the distance between our present reality and our preferred future is so great that "you can't get there from here." When the end result is so far from the current practice, leaders have to keep a very clear eye on the ultimate goal of making disciples but set proximate (operational) goals necessary to move us in the direction of our mission of making disciples. The proximate outcomes are not our missional client, but they are necessary steps that have to be put in place to move toward the end to which we have been called.

Leaders must be able to differentiate between missional ends and proximate outcomes, each of which tries to answer different questions. Our missional end of making disciples for the transformation of the world addresses the questions of who and what God now calls us to be and to do. These are essential questions of identity and purpose. Proximate outcomes necessarily answer the different question of what must be made different within the next five to ten years in order for us to move toward our missional end.

To date the more effective and hopeful changes in our denomination have, appropriately, been in efforts to address the proximate outcomes that present our most immediate challenges:

- A "Call to Action" that sets an adaptive challenge to focus on vital congregations rather than on denominational needs;
- A shared initiative to increase the number of vital congregations (which are resources for addressing our mission client, not an end in themselves) because vital congregations are a primary tool for making disciples;
- Missional appointments that focus the deployment of primary human resources where missional changes can be made within congregations and/or within community mission fields rather than focus on clergy career needs or on congregational preferences;
- Restructuring and downsizing annual conferences to redirect both resources and responsibility to the mission field;
- Developing new baseline budgets that reflect changes needed for the mission field rather than fulfillment of historic commitments or norms;
- A commitment to a difficult conversation about and a commitment to developing missional metrics that will introduce a new accountability for working toward our missional purpose.

Proximate outcomes, when ably addressed, will lead us to the next set of proximate outcomes – a stage of wilderness wandering that we can already see and will be addressed below. It is how we draw the map for the wilderness that didn't exist when we first set out.



4. Honoring readiness over egalitarianism (fairness) and the “tyranny of the all” (full inclusiveness):

Fairness and full inclusiveness are some of the powerful institutional norms named in the earlier 2006 “Leadership Under Constraints” monograph above needing to be relinquished. As one of the most democratic expressions of Protestantism, the United Methodist Church is highly attuned to fairness and inclusiveness and, while these norms have served us well in the past, they are exceptionally difficult to change.

As a denomination that unashamedly names diversity that requires inclusion and fairness as a key value of Christian community, these norms also take on a character of social justice. As a Wesleyan community, we cannot turn away from addressing social justice.*

However, an over-practiced sensitivity to democracy and inclusiveness now presents us with an inability to make decisions and to be more fully effective. A primary learning in the wilderness is that in order to serve our missional client of making disciples and changing the world, leaders must give preference to readiness over the old norms of fairness and inclusion. The needs of the mission field are already and will continue to be addressed by those leaders and those congregations who see and who have a passion for making a missional difference. These people and congregations of purpose and passion are the places of readiness. These are the places where, when the seed is sown, there will be growth; where, when disciples are called, people will be changed.

In the earlier managerial model of our United Methodist Church, the leader was responsible for protecting and preserving people and congregations – the institution itself was the client. That meant that if progress was to be made and faithful challenges addressed, our sense of managerial fairness required leaders to ensure that *all* clergy and *all* congregations be trained, resourced, and prepared to move ahead. However, when the value of “no congregation left behind” is practiced, the whole system does not move ahead. Instead, the “tyranny of the all” holds movement back. Resources and attention are misdirected to the weakest parts of the system and to the most recalcitrant of the leaders whose inclusion, out of a sense of fairness, is assumed – even if they don’t want to go.

Clearly the values of egalitarianism and fairness are appropriate when the people and the congregations of the denomination are seen as the client. However, when the client is the mission of the church, leaders must look for readiness – those people, congregations, and places where the mission is already, or has high potential of, being served – and then leaders must resource that readiness. This requires different, and appropriate, behavior from leaders.

Calvin Pava identifies the four situations in which leaders must choose the appropriate means by which to lead by looking at issues of complexity and the level of expectations about outcomes.^{xx}

- A situation in which there is little complexity and little difference in expected outcomes requires **problem solving** from the leader. A broken heater or air conditioner in the building is not a complex situation and there is high agreement about the desired outcome of having either heat or cool air. Good leaders simply need to problem solve and move directly to action.

** It should also be noted that we will need to face into the reality that our current practices of social justice through fairness and inclusion have made our denominational leadership more representative without significantly changing the diversity of our denomination or impacting a multi-ethnic and multi-racial mission field. As a tool of social justice, our strategies of representation and inclusion have more effectively served the church, and the people of the church, than serving the mission as client. If we believe ourselves to be truly called to be inclusive we will need to be more inventive about finding better tools for being more fully diverse and fully inclusive.*



- A situation in which there is little complexity but a high level of differences in desired outcomes requires **adjudication** (voting or clear authoritative decision-making). Choosing the color of the new carpet in the sanctuary is not a complex problem but may well be met with a multitude of expectations because of people’s preferences. No matter what color is chosen there will be those unsatisfied. Leaders must simply decide or move the group to a decision in order to move ahead.
- A situation in which there is high complexity but a level of shared hope for a desired outcome requires what Pava calls a **normative system redesign** – some process that will involve all voices being heard and providing places for all people to participate in order to come to a shared and supported outcome. Most linear strategic planning processes that congregations and conferences have utilized in the past decades represent such normative system redesigns. They work well in managerial times and in times of little cultural or community change since they are fundamentally linear projections of the current practice of the organization, adjusted and “improved” by the consensual agreement of the participants. Such linear designs do not work well in the wilderness. In fact, they block movement because they depend upon an improbable agreement within the system.
- A situation in which there is both high complexity and a high level of difference in expected outcomes requires what Pava identifies as **“non-synoptic planning”** which he identifies as using unclear objectives, imprecise methods, and disorderly action to change the system. This is the wilderness where the old known ways have been stripped away and there is no coherent agreement yet about how now to be with God and how now to be with one another. The leader must simply point in the direction of needed change (the proximate outcomes), share the purpose and the story supporting the needed change, announce that it is time to move, invite all to join the journey, and then move ahead with those who are ready and passionate to make the change. Others will come along, or drop to the sideways, as they choose. But the mission-client will be served, faithfulness will be followed, and the next steps in the wilderness will be learned.

Missional faithfulness in the wilderness must honor decisions made and directions determined by non-synoptic planning even though this is a form of leadership far from the norms of fairness and inclusiveness. Honoring readiness is a true adaptive challenge for leaders, as defined by Heifetz, because when confronted by continued old practices built on earlier norms, it pits what we say about our missional future against how we currently behave.

5. The need to “respectfully” exceed authority

In a system in which elected and appointed leaders are first given authority and then constrained from using it, where checks and balances are in place, change becomes more difficult. In a wilderness moment requiring deep change, such checks and balances prevent the level of change needed to rescue the institution, which is separating itself from its fast changing environment – a pre-condition of institutional death. In such a moment leaders must be willing to move beyond the authority given to them in order to produce needed change.

In reality, however, all groups naturally put limits on the actual use of authority by the leader. Whether considering formal or informal leadership, ascribed or earned leadership, no leader is given real authority by the group to go beyond the level of comfort of the group members. In fact, once uncomfortable, the people will turn to the leader to make the adjustments necessary to return the system to its former level of comfort rather than press ahead into a change that will increase the discomfort. In part, this normative reaction of people to look to leaders for comfort is a cause for the “sabotage” of formerly popular leaders and an explanation for why a person chosen and championed as leader in one moment is challenged and assailed in the next by the very same people.^{xxi}



Once the mission, not the people and pieces of the institution, becomes the client of the leader's attention, a level of systemic discomfort is required in order to provide the motivation for necessary deep change. The missional role of the leader is to provide an appropriate level of systemic discomfort rather than give into calls for the comfort of the earlier known time. Leaders must be informed and guided by the institutional rules in place, but not allow themselves to be constrained from going beyond them for missional purpose.

To lead into necessary discomfort requires a number of new practices for leaders. One such practice is the willingness to break the very rules for which one is responsible by virtue of election or appointment to a role of *episkope*. Legislated rules, established norms, and familiar practices have all been developed for important reasons in the past. In order to break such rules or give other values or behaviors priority, the leader must be purposeful, reasonable, and political.^{xxii} Breaking rules missionally depends on the leader's willingness to understand resistance, reprioritize the roles of leadership, effectively use the story of missional purpose, and exercise both a personal and political sensitivity to the relationship between the leader and the people.

Legislation is developed following people's experience – it does not lead the way. Norms and rules far outlive the people who developed them because they were appropriate to their time or preference, meaning that normative regulations tend to serve earlier generations better than present people. In a time of change, leaders must willingly wrestle with the earlier legislation and norms that once provided comfort through their known ways but which now represent an obstacle to survival and faithfulness.

6. Understanding resistance as information

Leading change, breaking old rules and norms, and supporting readiness to move ahead into the wilderness quite naturally and healthily engenders resistance. Forty-five days into a forty-year wandering in the desert we are told that the people began to grumble about Moses. (Exodus 16: 1-3). Quite right. That is how healthy people behave. Discomfort is a sign of threat and in moments of threat the people will always turn to the leader to re-establish safety and harmony (see #5 above).

In order to negotiate the deep change of the current mission field and the anxiety it has prompted in established denominations, leaders need to clearly understand that as a principle of group or community life, *resistance is not opposition – it is information*. Sensing danger or difficulty, people get the leader's attention by grumbling. The people are giving the leader information about something that they believe needs to be corrected. In most cases, the people will be offering information about perceived or threatened losses. For example, a good deal of the resistance in the most recent changes in annual conferences has focused on the perceived threat of loss of:

- Pensions by retirees;
- Security by people's whose effectiveness in the mission field is being questioned or whose particular extension ministry may not be included in future priorities;
- Status if a tenure appointment system is replaced by a missional appointment system;
- Self-esteem when, for example, a middle-aged clergy person who has learned his or her practice of ministry is told of the need to re-tool for a new mission field and may not be able to easily do so.

The concern about loss shapes the nature of the resistance.



Understanding resistance as opposition invites the leader to practice the politics of winning and losing and the common conclusion is that resistance must be defeated. Understanding resistance as information requires something quite different from leaders. It requires:

- The management of one's own anxiety so that the leader doesn't over-personalize the situation or add to the anxiety already in the system;
- A willingness to listen and engage others in dialogue, so the people feel their concerns have been heard, understood, and considered;
- A willingness to be constantly iterative in communication, so people's concerns about loss will be balanced and challenged by the purpose and importance of the change.

7. The need for a limited centralization

Our inheritance has been a bureaucratic, hierarchical institution appropriate to, and most effective in, the 1950s through the 1970s. At that time, when uniformity was still valued in many groups and organizational work could be siloed, people appreciated and knew how to use a chain of command, through which decisions were expected to flow down from the top. More importantly, both the local and global culture operated at a pace that allowed organizations to be slow and deliberate, dependent on a cumbersome, centralized structure for decision-making. Since then, globalization and technology have brought deep cultural changes demanding responses in speed, authority, and communication that can no longer be supported by highly centralized organizations. In their work on organizational structure, Ori Brafman and Rod Beckstrom argue that organizations that operate as spiders (with a centralized brain that controls all of the legs – and is easily destroyed by cutting the head off) are no longer agile and viable in the present setting, but those that behave like starfish (where decision-making and viability rest in the far reaches of the arms at a distance from, and less dependent on, the center) are much more suited to the pace and change of the current setting.^{xxiii}

In starfish-like reorganization, the United Methodist denomination has been refocusing its attention on the local congregation as the outpost in the mission field. It is in the local congregation where the mission field is directly engaged, where disciples are to be made. Currently much encouragement is given to individual congregations to develop their own sense of missional agency and to be inventive in addressing their mission field. Simultaneously, many annual conferences are downsizing their own structure and staff to redirect resources and attention to the local congregation and the mission field. Such downsizing is both appropriate and enabling.

The primary driver for downsizing, however, is not the dollars to be saved but, rather, the mission to be served. In an effective downsizing, dollars may or may not be saved, but the way of operating in the field must be changed. Conferences that are downsizing only for economy of operations, without addressing the changed need of the mission field, are merely prolonging their unsustainability. However, recent effective downsizing by conferences has established a pattern in which the focus is on several or all of the following:

- Reducing the number of districts and district superintendents, and simultaneously;
- Redefining the role of the district superintendent from a manager of clergy, congregations and conference functions to a missional strategist, giving attention to leadership development and resource deployment;



- Reducing the programmatic staff and the development and management of conference initiatives and programs;
- Reducing the structure of committees, boards and agencies, particularly where the primary “output” of those groups was the holding of meetings and production of minutes and reports;
- The use of salaried district administrative assistants, stipended circuit elders and stipended congregational coaches to push support, connection and resourcing out toward the local churches (and off the desk of district superintendents);
- The development of technology to support the use of networks to link individuals and congregations for both connectational and missional ends;
- The development of a single core decision-making body that claims the authority to set priorities and make decisions on behalf of the annual conference (a function no longer manageable through representative groups and annual conference action).

The general purpose of these effective downsizing efforts, which have been addressed in a number of creative ways by different conferences, is to push the work of ministry out to the mission field where the United Methodist denomination has or can, with new ministry starts, place its resources of clergy and congregations. This effort is clearly a starfish enterprise. Lodging the work out on the edges with congregations, away from the denominational center, has been supplemented by beginning efforts of accountability through the use of metrics, coaching, and clergy peer groups to both encourage and support the work closer to the mission field.

However, in the case of annual conferences, there is a limit to the functions and authority that can be pushed out to congregations which function under their own mission field strategies. Because of the North American associational nature by which individual congregations bond together by choice into a denominational identity, and because of the limits of the mission field responsibility and resources managed by the individual congregation, a fairly stable core must be maintained at the center of the structure of the annual conference. In this way an annual conference functions more like a “hybrid organization” as described by Brafman and Beckstrom rather than either a starfish or a spider.^{xxiv}

Functions remaining at the center of downsized annual conferences include:

- Centralized management of the full episcopal area mission strategy, including strategic clergy deployment, new ministry starts, and redirection of resources;
- Centralized setting of priorities (proximate outcomes) for adapting to the mission field and pursuing the mission as client;
- The “holder of the central narrative” of identity and purpose by which individual congregations can develop their own appropriate missional uniqueness yet remain connected to a common story;
- Back office administrative and management functions of apportionments, pensions and health care;
- Centralized management of the mediating relationships between local congregations and the general church and other denominationally related institutions, para-church and edge organizations.



8. Establishing and working from the primary roles of the episcopacy

Episcopal responsibilities are appropriately broad, covering sacerdotal, teaching, representative, management and leadership functions. However, the effective exercise of leadership must always be appropriate to the needs of the system. This suggests that the roles and functions given priority at any given time must be related to the specific time and setting of the system and must change over time as conditions change. In the current wilderness setting, there are four primary episcopal roles that have been developed by our most effective episcopal, and, by extension, our most effective district superintendent, leaders. These four primary roles are:

- 1) **Story Teller:** It is instructive to look at the Old Testament work done by Walter Brueggemann in which he consistently frames the central roles of the Old Testament leaders as preachers, prophets and poets. His point is that God's word of possibility is carried by story, poetry and metaphor. What unites and motivates us in purpose and hope is the bold story, and supporting smaller stories, of mission and identity, of what we are called to be and to do. We are not united by structure, resources, or legislation.

The facts of our life together do not bond or motivate us. In his work on organizational "springboard stories," Stephen Denning gives evidence that if people are offered facts, figures, charts, and reasons for pursuing some end, then the natural response is to argue with the facts, figures, charts and reasons.^{xxv} However, if people are told a story that carries within it the critical purpose of the pursuit of some end, then the common response is to intuit the steps necessary. People pursuing a bold, purposeful story quite frequently become inventive with changes that go beyond levels requested or even imagined by the leader using facts and figures. We do not commonly make choices that don't serve our own self-interest, preferences, or learned comfort unless a greater purpose is named.^{xxvi} But once named and owned, the greater purpose carried by a bold story spurs us past our self-interests.

People and congregations live into the story that they choose or have been given. When the leader gives the people a better, bolder story to live, there will be people and congregations – those places of readiness – who will respond intuitively, courageously and inventively to new levels of fruitfulness. This is challenging work for leaders as can be seen by the current level of conversations about dashboard measures and accountability where many hear only a story of institutional survival instead of a story of missional fruitfulness. But if this role of story teller offers challenges, it also has the great possibility of both (a) reconnecting people to the New Testament story that frames our purpose, and (b) reconnecting a theologically eclectic denomination with our original Wesleyan theology and identity that asks us to live in new ways in the mission field.

- 2) **Mission Strategist:** Gordon Cosby, former senior pastor of the unique Church of the Savior in Washington DC, talked about one's "corner of the Kingdom of God." He understood that each church is given responsibility for some part of God's kingdom, and congregations should not think of themselves as working the same corner as everybody else. Individual congregations must understand and be appropriate to the corner assigned to them whether by geography, because of the congregation's location, or by affinity and need, as appropriate to the gifts and passions of the congregation. Yet, congregations do not naturally look beyond their own corner to view the larger picture that belongs to their district or to their annual conference. The 2012 General Conference disciplinary change to define the district superintendent as a mission strategist reflects this critical need to look beyond the level of the local church in order to be strategic in outcomes, priorities and



the deployment of resources in larger venues. The essential role of the bishop as missional strategist is to manage that strategic missional overview of developing outcomes, priorities and the deployment of resources at the level of an episcopal area. It is a perspective for which no other voice will provide leadership.

Since mission field strategy is effectively operative at multiple levels – local, district, conference, regional, national and global – competing interests and claims will need to be negotiated. Such negotiation is essential to the episcopal role of mission strategist.

- 3) **Deployment Officer:** The argument offered in this paper is fairly straightforward. The client is the mission of making disciples and changing the world. The mission field is the place where the mission is served. Resources – human, dollar and other – need to be deployed in ways to most effectively serve the mission.

Clergy are limited human resources. In fact, in most congregations clergy are the most expensive resources to be used for mission and, as resources, they are limited. Clergy too frequently expend themselves satisfying the multiple and competing needs and preferences of the people of the congregation. They need to be used by the congregation appropriately for the mission and the mission field. Similarly, clergy and conference staff, dollars, volunteers, time, structure and attention are limited resources needing strategic deployment from bishops and district superintendents. While the appointment process provides bishops with their most obvious deployment opportunity, the wider role for bishops is to strategically gather and deploy the multiple resources of the conference and wider church for mission. Shifting the episcopal role in this way will, again, be challenged by the established institutional norms of egalitarianism and the tyranny of the all. Working against such old norms that now challenge the denomination's sustainability and effectiveness makes the task of deployment even more important.

- 4) **Catalyst:** In chemistry, a catalyst is an agent that can cause a reaction between two other elements without itself fusing into the interaction. It is the ability to get things done, to make things happen, without becoming a part of the work or without expending one's own energy to do someone else's work. It is the act of giving the work back to the people, which is essential to the decentralization of the system.

This episcopal role depends on the development of leadership skills, including motivation, delegation, supervision, and the use of accountability. Functioning as a catalyst requires relinquishing direct oversight control so that others can be clear about the goal but have freedom to choose or experiment with the strategies of working toward the goal. Similarly, it is an issue of granting permission and protection for those who do feel catalyzed for mission. Protection is particularly needed for those who will be catalyzed to work outside of the norms and traditions of the established practice of the denomination – an essential for doing ministry with new generations in a changed mission field.

9. The willingness to wander

The day of the expert is over. No single leader, no special program, no academic or consultant holds the wisdom or experience to tell others what to do to solve the problems that now confront the church. In great part, that is because the most critical issues that the church faces are not problems. By definition, Ron Heifetz points out, in order for something to be a problem, it must have a solution.^{xxvii} The great cultural shifts that have occurred in the North American mission field are clear examples of not being problems because they do not have solutions. There are no actions or answers that can take us back to the time and the ways of operation that were operative prior to the recent changes in generational values and shifts in culture.



Instead, the cultural shifts that we now face are “conditions,” not problems. The changes over the past few decades now frame the conditions under which the church must learn to live and in which the church must find ways to pursue its mission. Experts, and expert leaders, bring solutions to problems. They point to answers. Wisdom in such a settled and known setting resides in the expert individual. Such leaders suit problem situations well.

However, when facing conditions the appropriate response is not action – “What should we do?” – but experimentation and learning – “What should we try?”, “What do we need to learn?” When facing conditions, wisdom resides not in individual experts but out in the field where people are doing the actual work of mission. This shift of wisdom from the expert in the center to the practitioners out in the field is a driver requiring the shift from information and decisions coming down from the top of the denomination to information and decisions coming up from the bottom. Heifetz points out that a cause of much of the current organizational failure stems from leaders acting as if they are solving problems instead of facing conditions and doing the appropriate learning.

The way to move ahead in the wilderness is by learning. It is trial and error learning that comes from all who work directly with the changed mission field. Learning comes from those who work in the mission field and then talk with one another about their efforts and their failures, and then try again. It is no accident that the Lilly Endowment, Inc., made a \$124 million dollar commitment to 63 organizations developing clergy peer learning groups where such discovery and learning takes place. The evaluation completed at the conclusion of their Sustaining Pastoral Excellence Initiative makes the case that even the poorest of the clergy peer learning groups offers more practical learning and correlates more directly with measures of fruitfulness than the better and best of the alternative models of clergy continuing education.^{xxviii}

Learning by trial and error is wandering. It is the cycle of doing, measuring results, reflecting with others, and determining the next trial steps. When facing conditions, leaders must make a commitment to learning. Bold steps must be taken, but with a certain kind of agility, always knowing that the present bold steps will inform what needs to be tried next.

Rather than just stirring the waters to see what comes to the surface; rather than searching about for the silver bullet, magic program, or the latest expert; leaders need to learn from their own experience and the shared experience and insights of those colleagues who are also learning to live in the wilderness. Leading and learning at the same time creates the paradox of acting with confidence while knowing, with equal confidence, that the next steps, strategies and experiments will continuously need to be adjusted or corrected. In the wilderness, it is not just information alone that provides the way. Rather, conversation about one’s purpose and experience is the currency of change as leaders talk with one another about God’s possibility for the mission field and their efforts and experience of pursuing that possibility.

10. The practice of courage as a leadership skill

Leadership is commonly thought of as a skill set, and appropriately so. However, leadership also involves attitudes, commitments, and perspectives. The practice of such attitudes, commitments and perspectives must be developed like any other leadership skill.

At the present moment, courage is just such a needed skill. Courage, for the purpose of this monograph, is simply defined as leading without regard for personal reward (such as organizational appreciation). In organizational terms, it is necessary to do what Heifetz identifies as adaptive work that involves pointing out the dissonance between what an organization says it does and the behavior that it actually produces. In biblical context, this work with dissonance is the often-described role of the prophet who points to the difference between the covenant that God made with the people and the actual behavior of Israel. If the conversation of learning is the currency of change, courage to help people talk about right things is the requisite partner.



Following the Flashlight in the Wilderness

The image of a flashlight has been helpful in a number of our annual conferences already engaged in deep change where the beginning of the path of change has been set but the end is not yet in sight. The image of the flashlight comes from the simple story of a mother who tells her young son to go out on a dark, moonless night and check to be sure the barn door is locked. The son steps out of the house but returns in only a minute to report that he can't do his task because it is too dark to see the barn from the house. The mother then gives the young boy a flashlight and directs him again to his task. The young boy steps out of the house, but again returns in only a minute to report that it is still too dark and the flashlight is too weak. He still can't see the barn. His mother responds, "You don't need to see the barn, just walk to the end of the light."

Walking to the end of the light requires only a conviction that you are moving generally in the right direction (a conviction that the barn is at least somewhere in the direction that you are walking) and a willingness to make adjustments in travel as the flashlight reveals more and more of the path as you continually move to the end of the light. Having been in deep change long enough to have made progress, the light shown by the work of our most courageous leaders is now revealing the next issues to be addressed in our path toward denominational change and faithfulness. Having walked to the end of the light, we now see more. Included on that list of next challenges are:

1. **Unsustainability and the missional leadership skill of apportioning sacrifice:**

In times of stable growth and an ever-expanding economy, as experienced up through the 1980s, the key task of leadership was to distribute resources. This is a significant point made by Thomas Friedman and Michael Mandelbaum in their latest writing. Leadership as an act of distributing resources can be seen in the benefits given to GIs returning from WWII, tax considerations given to corporations for their growth, the social safety nets constructed during the building of the Great Society, the on-going public support offered through Social Security and Medicare, subsidized state level college education...and the list goes on. However, in times of economic challenge and a changing culture, the role of leader changes from the distribution of resources to the "apportionment of sacrifices."^{xxix} Benefits are constrained or reduced, debt limits are given ceilings, entitlements are rescinded. A good part of the 2012 presidential pre-election arguments are about how, and to whom, necessary sacrifices will now be apportioned

A key point made by Friedman and Mandelbaum is that in a growing economy leaders can produce growth without a plan. A rising tide raises all ships. However, a leader can't shrink without a plan. In a shrinking economy or a downsizing environment when sacrifices must be apportioned, the leader needs a plan to help people make difficult decisions.

The plan is constructed of *clear*:

- Purpose
- Proximate outcomes
- Guiding principles and priorities
- Guiding metrics
- Accountability to fruitfulness



The plan is commonly presented as a strategy for ministry but must be constructed of the clear components mentioned above, or else the leader cannot logically defend why one apportioned sacrifice is required but another is not.

Bold bishops and conferences have already begun to walk courageously into this wilderness challenge with remarkable results. However, there is still much to learn about apportioning sacrifice that will allow the denomination to shift from institutional protection to missional fruitfulness. For example, we will need to become more proficient at communicating such plans and their intent, better at identifying appropriate sacrifices, and better at helping conferences vote for or, in other ways, pursue sacrifices that threaten the security of individuals where concerns for relationships still trump efforts of ministry. Many people in the church are still at the point of applauding sacrifice as a bold idea but then sabotage sacrifice when it comes too close – whether the sacrifice is connected to them or to others in the conference with whom they have a relationship.

2. Breaking dependence: entrepreneurialism and citizenship:

For several generations clergy and congregations were invited to see the annual conference and the general church as the provider of goods and services to meet their needs. The general church provided decisions, experts, programs and publications. The annual conference provided appointments, pension and health benefit administration, interventionist staff, and local program initiatives. Clergy and congregations were invited to see themselves as the consumers of the goods and services provided by the larger church. Peter Block points out that to be a consumer is a passive position.^{xxx} The consumer waits for the provider to exercise agency – to give the answer, define the action, provide the expertise, make something better. At a time when the church uses the language of entrepreneurialism to express the need for leaders and congregations to claim their own agency, there is still much to learn about breaking current dependencies and giving the work back to the people. We do not yet even see the many ways in which dependence on the denomination is offered to clergy and congregations and continues to be encouraged.

3. Moving from vital congregations to making disciples:

The effort to redirect resources to increase the number of vital congregations, as named by the *Call to Action*, is a correct proximate outcome. Vital congregations are resources necessary to the end outcome of making disciples. Efforts to produce growth, stem decline, and help congregations who have slipped below the threshold of change to die, are correct efforts. The current unsustainability of our denominational position must be addressed by redrawing the multiple baselines from which we currently operate.^{xxxi}

However, at some point in the next steps in the wilderness, we will need to begin the conversation about both being and making disciples as the primary and end purpose for which we exist. We need more learning conversation about what discipleship in this changed culture requires. At the present moment, we are asking a good number of congregations to move closer to making disciples while being led by people who do not themselves actively practice discipleship. To work only on proximate outcomes like vital congregations, without also beginning the conversation about the end outcome of discipleship, risks following a passion for “what” without the guiding “why.” Using the flashlight analogy from above, it risks following the flashlight but forgetting about the barn.

4. Metrics:

“A system gets what it measures,” is a fundamental postulate of organizations. What gets measured determines where the organization will set its priorities and give its attention. Since measurement and productivity are linked, organizations that do



not measure anything are easily sidetracked to produce nothing – to make nothing different. The efforts of moving to metrics – denominational statistics, conference dashboards – is an uncomfortable but necessary step toward realigning our congregational and leadership resources to the mission field where differences are to be made. However, our efforts are still young and there remains much for us to discover in terms of appropriate measures and effective use of those measurements.

At the moment the United Methodist Church has focused on the most easily quantifiable measures that, while easily measured, are soft indicators of either our proximate goals or our missional ends. The immediate value of these measures is that they require a refocusing of the attention of our leaders on issues of congregational vitality. There remain, however, at least three issues that the church will need to address that are related to our metrics.

The first is the issue of finding the appropriate measures. Organizational or professional metrics can be as counterproductive to the mission as they can be helpful to effectiveness. Young lawyers who are measured by their law firms using the metric of billable hours may serve the law office well in terms of revenue and can give evidence of commitment and productivity. However, the pressure of billable hours also makes the young lawyer less responsive to actually serving the clients' needs or short-circuits learning the fuller practice of law that goes beyond the minimum required by a revenue-based system. Physicians measured by revenue brought to the medical practice are commonly driven by the categories of procedures defined by medical insurance and depend on tests that are covered by insurance than by the health needs of the individual patient. There is evidence that the diagnostic skills of young doctors has declined because diagnosis is as much determined by the insurance payment as it is by the information presented by the patient. Like the professions of law and medicine, it is not yet clear that the measures now used in the church are appropriate to moving us toward our wanted goal of vital congregations or are derailing us back to institutional service.

The second issue is one shared by all non-profits that have to search for outcomes that are important, measurable (quantifiably and qualitatively), and sufficiently causal as to make the link between the effort expended with the results observed. Like all non-profits, learning to develop and follow missional outcomes is both challenging and difficult.

The third issue is one of motivation. What can be measured may not be that which motivates leaders in ministry. There is a direct link between motivation and measurements and the wrong measures easily destroy motivation. There is simply much more for us to learn here, more that will need experimentation and learning in the next part of our journey.

Conclusion: What Does Leadership in a Managerial System Require?

As noted at the beginning, this paper has a singular approach – that of organizational and systems theory. Nonetheless, the case can be made that such “secular” ideas and tools are supportive of spiritual leadership when used faithfully for purposes of mission. Corporate leaders bring the tools of their faith to their workplace when they seek a vision for their company, sit in prayer groups with their colleagues, and worry about the soul of their corporation. It is likewise appropriate for church leaders to bring the insights and practices of commerce and the sciences to be used in response to the call of the Spirit.

This paper has tried to offer a strong argument that the demands of leadership are different from the requirements of management. Along with differences in the skills and ideas needed for leadership, a difference of spirit is imperative. The leadership demands of the spirit require courage. Change is neither predictable nor controllable. Leadership requires walking into unknowns that feel dangerous. In a marvelous telling of the moment when the Israelites reached the edge of the Red Sea



with the Egyptians in pursuit, the Hebrew Midrash recounts how the leaders sat on the bank arguing who would step into the unrelenting waters first. Finally, impatient with the debate, Nashon, son of Amminadab, stepped out on his own and plunged into the water. It was only when Nashon appeared to be drowning that God instructed Moses to hold his rod over the sea and split it.^{xxxii} Courage is required of Nashon to jump into unparted waters, for Moses to lead people into a desert with no exit strategy, and for leaders to make discerning choices to identify and resource outcomes with no guarantee of success.

The demands of the spirit also require inquiry more than control. If the appropriate response to adaptive situations is learning over action, leaders must risk “not knowing” while leading. When paradigms shift, the only way to lead is by being clear about not knowing what to do and being willing to learn, to look again.

In fact, new learning, by definition, assumes risk and cannot be controlled. In the 1970s, during a time when there was concern over whether the human potential movement was providing experiences that were helping or damaging people, a research project was mounted to answer the question. Insightfully, one of the conclusions of the project was that damage and growth, discomfort and learning, are difficult to distinguish because learning inherently cannot be controlled and requires the dismantling of the known.^{xxxiii} Inquiry can only be risked; it cannot be controlled.

Finally, the demands of the spirit also require trust that allows room for God. Lone-ranger leadership—either singularly or in the guise of the genius with a thousand helpers—is an effort to provide answers and control. Having clear answers and being in clear control mean that there is no room, no empty space, kept open for the surprise of God’s presence. The notion of adaptive leadership (learning leadership) means leading without knowing where one is going or, more appropriately, without knowing where and how things will come out. To lead in such a way depends upon a trust in God that purpose will be given to the risk, meaning will be brought to the work. To live in such trust requires discernment of a future that is stronger with conviction than it is with proof. To lead only when the path is known allows no room for God, no space for the movement of the Spirit—which is where the changed life is encountered. It is not easy to move into the desert with no food, and it is no comfort that when manna *does* appear, it is so uncommon it has to be explained. The journey depends upon trust, and transformation by the hand of God depends upon the journey.

The story of the exodus serves us well in this moment of denominational and congregational change. It took both Moses and Aaron to get the people through. Moses embodied leadership. He sought out the big questions, spoke with God, and carried a vision so bright that his face shone even when he was not sure in which direction to walk. With him was Aaron who embodied management. He organized, made judgments, and focused on the next day’s trip rather than the final destination. Not only were both needed, they had to walk together closely. As one rabbi friend commented, suggesting a more contemporary Midrash, it was only when Moses (leadership) and Aaron (management) walked side-by-side that the people were faithful. When too far separated, with Moses on the mountaintop and Aaron below in the valley, confusion set in. Aaron organized the people to begin making the images that were breaking the very commandments that Moses was receiving.

What does it mean to be asked for leadership in a managerial institution? It means that as important as Aaron and his managerial strengths were, the people could not have found the Promised Land with him alone. It means that Moses needed to listen beyond the grumbling of the people that began forty-five days into a forty-year trip. It means giving attention to the purpose and destination—trusting in the presence of God.



Endnotes:

- ⁱ Edward Leroy Long, Jr., *Patterns of Polity* (Cleveland, OH: Pilgrim Press, 2001), 29.
- ⁱⁱ Long, 31.
- ⁱⁱⁱ Gil Rendle, *Leading Change in the Congregation* (Bethesda, MD: Alban Institute, 1998), 14-16.
- ^{iv} Gil Rendle and Alice Mann, *Holy Conversations: Strategic Planning as a Spiritual Practice for Congregations* (Herndon, VA: Alban Institute, 2003), 3-6.
- ^v Ronald Heifetz, *Leadership Without Easy Answers* (Cambridge, MA: Belknap Press, 1994) 14.
- ^{vi} Jim Collins, *Good to Great* (New York, NY: Harper Collins, 2001), 45-48.
- ^{vii} Craig Dykstra and James Hudnut-Beumler, "The National Organizational Structures of Protestant Denominations: An Invitation to a Conversation" in *The Organizational Revolution: Presbyterians and American Denominationalism*, Coalter, Mulder, and Weeks, eds. (Louisville, KY: Westminster John Knox Press, 1992), 307-331.
- ^{viii} Heifetz, 22.
- ^{ix} Gregory Bateson, *Steps to an Ecology of Mind* (New York, NY: Ballantine Books, 1972), 202-212.
- ^x John Scherer, "The Role of Chaos in the Creation of Change," *Creative Change* 12, no. 2 (Spring 1991), 19-20. The contrast between managerial problem solving and the need for leadership appropriately to address pain and possibility is treated at greater length in Rendle's *Leading Change in the Congregation*, 77-100.
- ^{xi} Michael Crichton, *The Lost World* (New York, NY: Ballantine Publishing Group, 1995).
- ^{xii} Thomas Kuhn, *The Structure of Scientific Revolutions* (Chicago, IL: University of Chicago Press, 1970), 84.
- ^{xiii} Edwards Deming, *Out of Crisis* (Cambridge, MA: Massachusetts Institute of Technology, Center for Advanced Engineering Study, 1986), 23-24.
- ^{xiv} Stephen R. Covey, *The 7 Habits of Highly Effective People* (New York, NY: Simon & Schuster, 1989), 96.
- ^{xv} William Sloane Coffin, *Credo* (Louisville, KY: John Know Press, 2004), 140-141.
- ^{xvi} Heifetz, p. 87.
- ^{xvii} Wally Armbruster, *A Bag of Noodles* (St. Louis, MO: Concordia Press, 1972), 5.
- ^{xviii} C. Kirk Hadaway, *FACTs on Growth:2010* (Hartford, CT: Hartford Institute for Religion Research, 2011).
- ^{xix} Hadaway., 6-9.
- ^{xx} Calvin Pava, "New Strategies of Systems Change: Reclaiming Nonsynoptic Methods," *Human Relations* 39, no. 7 (1986), 615-633. For further discussion of nonsynoptic planning see Rendle, *Leading Change in the Congregation*, 149-156.
- ^{xxi} Ronald Heifetz and Marty Linsky, *Leadership on the Line: Staying Alive Through the Dangers of Leadership*, (Boston: Harvard Business School Press, 2002).
- ^{xxii} Gil Rendle, *Back to Zero: The Search to Rediscover the Methodist Movement* (Nashville: The Abingdon Press, 2011), 21-34.
- ^{xxiii} Ori Brafman and Rod Beckstrom *The Starfish and the Spider: The Unstoppable Power of Leaderless Organizations* (New York: Penguin Group, 2006).
- ^{xxiv} Brafman and Beckstrom, 161-178.
- ^{xxv} Stephen Denning, *The Springboard: How Storytelling Ignites Action in Knowledge-Era Organizations* (Boston: Butterworth Heinemann, 2001), 3-52.
- ^{xxvi} Rendle, *Back to Zero*, 53-67.
- ^{xxvii} Heifetz, 69-84.
- ^{xxviii} Penny Long Marler and Janet Maykus, "Is the Treatment the Cure? A Study of Participation in Pastoral Leader Peer Groups" (Austin Presbyterian Seminary, 2010).
- ^{xxix} Thomas Friedman and Michael Mandelbaum, *That Used to Be Us: How America Fell Behind in the World It Invented and How We Can Come Back*, (New York: Farrer, Straus and Giroux, 2011), 160.
- ^{xxx} Peter Block, *Community: The Structure of Belonging*, (San Francisco: Berrett-Koehler Publishers, 2008), 63-64. For further discussion of consumers and citizens see Rendle, *Back to Zero*, 31-34; 53-67.



^{xxxii} Lovett Weems, *focus: The Real Challenges That Face the United Methodist Church*, (Nashville, Abingdon Press, 2011).

^{xxxiii} Reuven Hammer (translator), *The Classic Midrash: Tannaitic Commentaries on the Bible* (New York, NY: Paulist Press, 1995), 92.

^{xxxiiii} R. Kaplan, S. Obert, and W. VanBuskirk, "The Etiology of Encounter Group Casualties," *Human Relations*, 1980, 33, 131-148.

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