

Institutional Formation: Agreements of Belonging

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"If we take time to reflect together on who we are and who we could choose to become, we will be led into the territory where change originates. We will be led to explore our agreements of belonging, the principles and values we display in our behavior, the purposes that have called us together, the worlds we've created." Margaret Wheatley [*A Simpler Way*, 100]

When Robert Greenleaf, the founder of the Center for Servant Leadership, was asked why so many of the institutions in our society fall short of their potential, he responded: "Possibly because these institutions are seen by too many of us as impersonal entities to be used and exploited. Most people do not give institutions the human caring and serving that they give other persons. If we are to have a moral society, moral people must also care for institutions." Intrigued by his observation, I have spent the past decade exploring what it would mean to invite people to care for their institutions, especially institutions of higher education.

I have come to appreciate that while faculty and staff are deeply dedicated to their professional work, the current processes of governance of their colleges regularly fall short. These processes often do not support taking collective action to insure that the institution's highest potential is fulfilled. Few campuses provide meaningful opportunities for people to come together to explore, as Margaret Wheatley describes, agreements of belonging and principles and values of behavior. Rarely is time devoted to collectively exploring the purposes to be pursued and the worlds that are being created through the work of our colleges and universities.

This essay organizes and synthesizes what I am learning. About eight years ago, I began to call this caring for our institutions, the process of institutional formation. I intend lay out what institutional formation means and describe some of the processes that show promise of fostering institutional formation. I ask you as the reader to

accompany me on this venture into formation, to affirm what makes sense to you, to complete that which falls short and to share what doesn't resonate with your own knowledge and experience.

Discovering the Inner Landscape of Institutions

Institutional Formation

Join me in a brief look at this word, "formation." Its root, of course, is the word "form," meaning shape or structure or to shape or to structure. "Formational" is that which gives shape or structure. And "formation" is the process of giving shape or structure or the results of giving shape or structure.

Institutional formation is about the collective experiences through which the members of a college shape its meaning, identity and purpose. Paraphrasing Frederick Buechner, our work at Nova is about creating the space where people in a college can discover their collective heart's deep gladness and can discern from among the many deep hungers of the world, the ones they hope to meet. I have come to define institutional formation as how we co-create and care for the institutions to which we belong.

The seed of institutional formation grew out of the experiences that I shared with colleagues across higher education during the early nineties as we came together through the American Association of Higher Education to explore the meaning for higher education of Deming's continuous quality

improvement, Senge's systems thinking, and Wheatley's self-organizing principles.

In those years, I visited campuses where the pursuit of quality in its best sense seemed to be a meaningful goal. I would often request meetings with the people who comprised the institution: the administrators, the faculty, the support staff, the students, and sometimes people in the community. Invariably, each campus would organize a set of separate meetings of each group. So I would find myself in conversation with administrators, then with faculty, followed by support staff, and sometimes with students. I found people who cared deeply about their work in education or their opportunities as students. I found people who wanted to bring their gifts to the highest purpose of the institution of which they are a part.

I also found, too frequently, administrators who would disparage faculty, faculty dismissive of administrators, and both usually ignoring support staff. Rarely were students thought of as part of, let alone the primary purpose, of the institution. I found a prevalent sense of disconnectedness. People expressed the pain of a lack of connection with others on their campuses. Sadly, the phrase "academic community" was used more in irony than in hope.

While I found people who expressed high ideals, I observed how often they engaged in behaviors that were destructive of others and of themselves. What struck me in particular was not that there were a few bad or evil individuals, but that on many campuses, good people often went along with practices and interactions that were at times abusive and some that were self-destructive. This is when I first formed what has become a core question of my work, "Why do good people who come together with good intentions of serving good purposes so often end up abusing each other?"

Institutions do not just happen. They are societal artifacts. Society encourages the creation of institutions as a productive and efficient way to solve a societal problem or address a societal opportunity. Institutions do not operate independent of society but rather in response to a purposeful call by society.

In the early nineties, while valuing the use of the practices and tools of continuous quality improvement and systems thinking, these were insufficient to support the institution reaching its potential. I grappled with how to create the space for the people who comprised a college or university to come together in ways that supported the institution's serving society and that nurtured the lives, aspirations, and gifts that people brought to that institution. I also sought to understand how to address the destructiveness or shadow that I found on campuses.

Collective Spirit or Interiority

A colleague recommended the work of theologian Walter Wink who has written extensively on abuses of power in organizations. While Wink acknowledges that power can be abused by individuals, he believes we are missing a foundational understanding of how the members of an organization *collectively* use and abuse power.

Drawing on biblical images, Wink introduced the possibility of an institution having a "collective spirit" that encompasses the collective identity or personality of an institution and the promise and potential of that institution to serve the world. Embedded in that collective spirit, he suggests are the hopes and aspirations as well as the fears and anxieties shared by the people who do the work of the institution.

The more I worked with diverse campuses, the more I began to see how this concept of a collective spirit or interiority spoke to the way a college is more than a collection of individuals organized to do certain work. At a deeper level, it is the collective expression of what is in the hearts of those who created, passed through, and/or work today in that college.

Collective spirit was at least worth investigating to see if it could support the growth and potential of our academic institutions. I began to consider the possibility of institutions having an interiority or inner landscape that contributes to shaping the work of the institution and forming the life experiences of those who are a part of it.

This idea of a collective spirit or of a spiritual dimension of an academic institution did not come easily for me. I had no desire to introduce the concept of spirituality into the academic work world. I spent much time in solitary reading and refrained from discussing these ideas openly until they began to take shape, and I felt compelled to share them. Slowly, I began to share what I was learning with others.

The responses I received from educators affirmed the direction of my exploration. If I just used a few words – meaningfulness, purposefulness, authenticity, and integrity – the floodgates of passionate conversation opened. Words that draw on something deeper than budgets, curriculum, and strategies gave permission for people to talk about the aspirations embedded in their daily work.

I began to wonder if we might explore ways to intentionally address and shape this interiority or inner landscape of a college. Was there something from the world's wisdom traditions that could help us access a deeper dimension of academic institutions? I proposed to the Fetzer Institute that they support a small gathering of people coming together to consider the question of whether we should try to explore our academic institutions at a deeper level.

At our first gathering, twenty-five educators met for three days. We struggled with the newness of the concept of the interior of an institution, with the language to describe it, and with the potential implications of what we discussed. We were excited but also cautious. We agreed we sought “nothing less than the liberation of the human spirit on our campuses.” This is what education is about.

"Exploring the Inner Landscape of our Academic Institutions," captures the ideas and questions that emerged in this and a follow-up gathering.

On their own campuses, members of our original group began to explore these ideas with colleagues. We collected the stories of what happened as they initiated these conversations. We began to define more clearly what institutional formation means:

The creation of opportunities for the people who comprise an institution to

reach down into the collective spirit of the organization to shape the institution in ways that will serve society and that will nurture those who bring their gifts to the work of the institution.

Our challenge in this work is to discover those ways in which we can create and hold space to hear the collective inner voice of the institution. Just as we grapple with the meaning of authenticity and integrity in our individual lives, we need to discover what we mean by the authenticity and integrity of an academic institution. The outer forms of the institution, i.e., physical plant, curricula, operation and budgets, always reflect its inner life. Whether our academic lives are grounded in humility, community, hope and justice or whether they express self-aggrandizement or self-deification, jealousy or greed, fear or violence, as Wink says, the powers rule from within.

Developing Institutional Formation Processes

Communal Discernment

In the quotation that opens this essay, Margaret Wheatley invites us to “take time to reflect together on who we are and who we could choose to become.” In our work at Nova, we have explored how to create the space for this collective reflection and collective expression of aspiration. We have experimented with ways to bring people together in convenings that provide for meaningful dialogue and reflective conversation about what is important to them and to their institutions. We have worked with as few as 25 and as many as 800 people coming together on a college campus.

Something unusual and hopeful happens in these campus gatherings. A collective focus on finding common ground and sharing what gives meaning to their work lives is often a novel experience. Drawing on their shared hopes and aspirations creates a spirit in the gathering that many report they have not experienced on their campus.

The dynamics present in these convenings stem from the growing respect that occurs when people are invited to talk with each other about what is

important to them and the getting-to-know each other that doesn't often happen on our campuses.

Bill Wylie-Kellerman, talking about social change observed: "We can change the leaders, we can oust the ruling class, we can seize the means of production, we can restructure the society, but if we have not engaged a spiritual transformation, the new leaders, the new structures will simply be more of the same."

At Nova we were often working with colleges and universities on organizational change, helping them find new leaders, new structures, new strategies. How could we avoid these becoming simply "more of the same?"

I tried to imagine what a spiritual transformation of a college might mean. A bias that I had was that a spiritual transformation would be a process that came from the inside out. It would not be the direct result of an action taken by someone on an institution, but rather would engage the stakeholders of the college in an exploration of its deeper meaning and purpose.

I discovered a clue to this challenge of "inside out" in an essay by Michael Sheeran, S.J., President of Regis University. Sheeran described similarities between the Quaker tradition and the Jesuit tradition. A key similarity was that both traditions center on a communal discernment process, a way in which the people who comprise the institution come together to decide collectively what should happen in and for the institution. A communal discernment process was consistent with the large group processes that we had been employing, and it spoke to engaging the members at a deeper level. For both Quakers and Jesuits, communal discernment is more than good conversation. It is reaching down into the heart of the community to uncover and express what is most essential to the community.

Margaret Benefiel of Milltown Institute, Dublin, suggested another fruitful direction for institutional formation. In a second gathering sponsored by the Fetzer Institute, Margaret led us, through storytelling and reflective conversation, to recall those times when we felt we were in a spiritually-grounded situation. Next, she asked us to recall

those times when we felt we were in a spiritually-risky situation. Her giftedness helped us recall individual experiences, reflect on those experiences together, and begin to develop a collective understanding of how we would describe a spiritually-grounded institution. It was communal discernment in practice.

In *A Simpler Way*, Margaret Wheatley applies what we have learned in biology to how we can create and sustain thriving organizations. She identifies three essential conditions for self-organizing systems. *Identity* is the "self of the system that compels it outward toward particular actions and behaviors. . . the self that defines meaning." *Information* is needed "to understand who it is, where it is, what it believes, what it knows." *Relationship* is the "quality of the connectedness among its members."

These three conditions essential to institutional sustainability provide a place to begin communal discernment:

- Who are we as we come together as the faculty and staff of a college?
- What are we learning about ourselves and about the world we serve that helps us decide what we need to do?
- How do we support and care for each other in our collective work so that our individual gifts are nurtured and our collective gifts flourish?

Institutional Light

At Nova, we have pioneered the use of campus-wide processes of collective reflection and collaborative learning to foster organic, catalytic change. Among the processes we have explored, two have shown particular promise for supporting institutional formation: Appreciative Inquiry and Open Space. Both can serve as processes for communal discernment.

Appreciative Inquiry recognizes that when change is being introduced, people must have the opportunity to identify what they don't want to lose about the institution as they plan their future. Through story-telling, small group dialogue, and plenary conversation, those gathered begin to find

the positive core of the college – those factors that give the college health and vitality and that foster the creativity of the people who comprise the college. This is not a brainstormed list of “values.” It is a mining of stories to find out by reflecting on experience what is the essence, the heart, of the college that must be carried into its future. Having established this foundation on which to create the future, those gathered move on to dream, design, and decide together the right strategic direction for their institution.

When an important issue arises on a campus, an Open Space Conference can provide a way for people to begin their deliberation with open, honest questions that speak to the core of the issue and that draw on the passion they feel for the issue. In Open Space, participants decide what the critical questions are, self-select into conversations about those questions in which they are most interested, and share their breadth of perspectives in conference-wide conversations. When the participants themselves are invited to design a collective inquiry through the questions they see as vital, they engage at a deep level.

Among all the engagements Nova has with colleges, the opportunities for conversations of consequence created through Appreciative Inquiry and Open Space are the most exciting and rewarding. I would describe them as the ways we have found to collectively discern the gifts or the light of the institution.

Institutional Shadow

Just as we invite people to collectively discern the light of an institution, there should be ways to collectively discern its shadow. We need to understand those times when the awesome power and the wonderful gifts of the institution are used to divert it from its calling to serve the world.

We can begin to explore an institution’s shadow by looking at times when its light or its gifts are misused. A caution: this work must be done carefully in order to ensure that neither individuals nor institutions are harmed by thoughtless or careless experimentation.

Parker Palmer invites individuals to explore the light of their gifts before exploring their shadow side. Similarly, it is important to lay the foundation of identifying the positive core or the light in the work of the institution before engaging the institutional shadow. This provides an affirming place to begin a tough inquiry, and it often yields the information on where to begin to explore shadow.

What Walter Wink has called the rampant individualism in our society can get in our way. Our tendencies to think of ourselves as acting primarily independently and to lay blame on one or a few identifiable people when we personally experience pain in organizations can be obstacles. In order to uncover the shadow that is held collectively, we have to grapple with our understanding of institutions and our own roles as members in creating and sustaining both their light and their shadow.

Experiences with campus-wide processes persuades me that the grace and power to deal with the institutional shadow emerges in a communal discernment. As in identifying gifts, it is through our story telling that we explore the shadow of the institution. Again, it involves questions that invite open, honest, and meaningful conversation. The experience of celebrating together the light at the heart of the institution can support sharing the risk of exploring its shadow. Consistent with Wheatley’s conditions of institutional sustainability, this is collective exploration of who we are and how we relate to each other.

A Cycle of Formation

Healthy “agreements of belonging” do not just happen. They are a lived and growing experience. Approaching institutional formation as a cyclical experience provides the opportunity for members of a college or university to learn and grow together – and consciously co-create the institution. It can begin with a simple communal discernment that invites people:

- To reflect together about who they are and what they are about collectively as an institution, including the light and shadow of their institution;

- To discover what they agree would be fulfilling in how they can work together to serve society and to carry out their life's work in a supportive environment; and then
- To discern the risk-taking they are willing to share in order to pursue that fulfillment.

Simplicity is important. Too often large group work involves complex designs, convoluted structures, and elaborate goals. The effort put into complicated approaches too often reflects more a desire for control on the part of the designers or managers than a commitment to trust the insights and knowledge – the hearts and minds – of the people who comprise the college or university.

Institutional formation doesn't have to be formal, nor does it always have to be strictly through conversation. There are many ways to proceed. Most important is that there is an opportunity for the people who comprise an institution to discern: What is it we're here to do? What is it we care most about accomplishing together? What are we willing to do together to serve society and to support each other as we do it?

We must find ways to help our colleges achieve their potential to serve society well and to nurture those who are members of the institution. We must learn how to create the space for people to come together to discern their right work and the right ways of working together.

Then we must learn to trust and support them in what they decide to do.

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