

Leadership in a New Lens

Part III: New processes for discerning and electing leadership

Video Presentation for FSA Regional Gatherings
Ted Dunn, Ph.D., November 22 – 23, 2024

“Discernment is always personal, but never private.”
James Martin, SJ

Part III: New processes for discerning and electing leadership

Having recalled the Big Picture and having looked at leadership through a new lens, let's now turn to your approach for discerning and electing leaders.

Let's look at the typical approach you may have used in the past and invite you to reflect on what's not working, the potential pitfalls, and how you might want to meet the challenges of today. Your feedback will help the Chapter Planning Committee, Beth, and me to shape the process going forward.

Create the leadership you'd love to see and transform how you hope to partner with one another and others who resonate with your charism and mission. That's our hope for how you might approach your discernment and election. The goal is not to shoehorn your leaders into what you've done in the past, but to create a new kind of partnership that enables you to flourish.

For this presentation, we will ask a series of questions, the ones you have on your handout, entitled, “Part III: New processes for discerning and electing leadership.” Instead of pausing at the end of the presentation, as we did before, this time we will pause along the way to give you time to jot a few notes in response to each question. We think this will help you hold onto your thoughts as we introduce the various pieces of this presentation.

Typical steps in the process

The typical steps in the process for discerning and electing leadership looks like this:

Step 1: Define the needed characteristics for leadership

Step 2: Surface names of those you wish to call forth who match these characteristics

Step 3: Send the sisters you've called forth to a discernment retreat

Step 4: Elect a new leadership by a secret ballot

Step 5: Install the new leaders and claim a new way forward

Let's expand on each of these steps and look at what you think is, or isn't, working. We want to surface potential pitfalls, offer some alternatives, and solicit your feedback.

Step one: Defining characteristics

Here are some potential pitfalls when defining the characteristics of leadership:

1. The laundry list of characteristics that is typically generated offers little or no discriminatory value and is frequently ignored.
2. The focus on what is needed only for leadership, without considering what is needed from members, is too narrow. There is a lack of focus on the *relationship* between leaders and members and the system in which it is embedded.

General characteristics

The problem with listing the desired characteristics of leadership is that they are often so broad and general that they provide little discriminatory value. In addition, what often happens is, once this list is drawn up and written down, it is set aside, lost or forgotten. Too often it has little influence on whose names are eventually surfaced, let alone who is elected.

If Beth and I looked back in our files, we could tell you what most communities name as important characteristics of leadership. We would find that nearly everyone surfaced things like: "good communicator," "sensitive to the needs of the sisters," "prayerful women," "Gospel women," or "Franciscan women," in your case. Really! Doesn't this describe all of you? Hopefully it does. These are all good qualities, but they would do little to discriminate one sister from the next as a potential leader.

Other qualities surfaced might include: a “visionary” and a “detail person;” “good with finances” and “good with people;” “understands process” and “gets things done.” These might be good complimentary qualities, but it’s hard to find a “poet” and “pragmatist” in the same person. Ideally, these would exist in a team of sisters, but unlikely to exist in any one sister.

If you are going to look at characteristics, there is little need to reinvent the wheel. As was mentioned in the last presentation, the research indicates the most important quality of a leader is her “credibility.” You will need someone who is honest, forward looking, inspiring and competent.

We also know what is needed from a leader if you are to go down the path of transformation. You will need someone who can help carry you through the chaos of transformation. They need to challenge the status quo of the system you currently have and orchestrate the conflicts required to work through the chaos. They need to help create a holding environment, a safe and sacred space, in which members can withstand the messiness and discomfort of transformation. And they need to design and facilitate the kinds of processes that we now know contribute to the work of transformation.

While all of these characteristics might be worth considering, we’d like you to add your own specific ones for your Congregation at this transitional time in your evolution. Beyond these general characteristics, we are asking: ***What specific “behavioral competencies” do you need in your elected leaders, now, at these crossroads, if you are to walk a path of transformation?*** Whatever list of competencies you decide is important, make it short, concrete, and specific. Take a moment now and jot down one or two essential competencies of leadership that we will want to keep in front of you throughout your discernment and election.

Lack of focus on members and the relationship between leaders and members

As mentioned in the prior presentation, we believe that this notion of “transformative partnerships” is a helpful twist of the kaleidoscope. It is an effort to foster systemic change, not just a structural change in leadership. It takes you beyond the traditional narrow focus solely on leadership and, instead, emphasizes the value-base of mutuality in undergirding this partnership.

The way your Congregation operates, looking at it systemically, is a function of the dance that takes place between and among both leaders and members. If you are going to learn to dance differently, more mutually, you cannot just ask one of the dancers, namely leadership, to change. You must ask yourselves, as members, to change as well. You need to learn *together* whatever new dance steps you want to perform. It takes two to tango, leaders and members together.

What new dance steps, new ways of interacting, would you like to see in the relationship between leaders and members? Name two specific ones. Once again, take a moment now and jot down one or two *new ways* that you want leaders and members to interact differently so you can keep these in mind throughout your discernment and election.

Step 2: Surfacing names

The second step in the process for discerning and electing leadership is to surface the names of those sisters you want to invite to discern the call to serve in elected leadership.

Several problems can occur in this particular step. Here are some examples:

1. Again, despite what you identified in the previous step as important, too often people are invited into discernment who do not fit these characteristics. We've seen sisters whose names have been surfaced who show signs of cognitive decline, are physically ill, or are emotionally not equipped for leadership. Have you ever seen this?
2. Some sisters might invite other sisters who were previously hurt because they weren't elected last time. To ease their pain, they're invited once again in an effort to affirm them and ease the wound. Has this ever happened?
3. Some sisters surface the names of their friends or teammates for fear of hurting them if they don't. Does this happen?
4. Some sisters tell others ahead of this exercise, "Please, don't put my name down" because they don't want to be elected. Has this ever happened?
5. Sisters invited to discern are seldom given feedback that is direct, descriptive, tentative, and invitational. Sound familiar? Often it is general, evaluative, definitive and no conversation takes place between the one inviting the sister and the sister receiving the invitation. The feedback, while it might be affirming, doesn't inform or enrich the discernment of the sister being invited.

All of these examples about the very process of what we consider to be genuine communal discernment.

- 1. In what ways do any of these potential pitfalls match your experience? Jot down some examples.**
- 2. Are there other challenges in this step of the process that you would like to see addressed?**

Step 3: Personal and Communal Discernment

This third step involves asking those sisters who received invitations to attend a discernment retreat. Problems that can occur with this particular step include:

- Discernment retreats typically emphasize personal discernment, but very little emphasis is placed on communal discernment. We refer to this as “parallel personal discernment,” rather than genuine communal discernment.
- Many discernment retreats emphasize prayer and reflection, but limit the dialogue among discerners regarding who has what kind of competencies, and what kind of approach to leadership they would love to create together.
- Some sisters decide ahead of time, on their own, not to go to the discernment retreat and take their names off of the list for any further discernment.
- Some opt out following the discernment retreat without any further discussion or discernment with the community.

These are just a few of the pitfalls we have encountered with this third step. What is your experience?

James Martin, a Jesuit revered for his work in discernment, tells us, “discernment is always personal, but never private.” We agree with James and also with the famous proverb, which says, “The reason two antelopes walk together is to blow the dust from one another's eyes.” Sisters need the support, wisdom, challenge, prayers and partnership of one another in discovering God’s will. It ought never be private.

We ask that those at the retreat, engage in personal discernment AND we ask that they engage in communal discernment, as well. It is a both/and, personal and communal, process of discernment that is woven together throughout, and into, the election. Concretely, for example, this means that no one simply just drops out or withdraws without first discerning with, and hearing from, the community. This is not to negate the personal discernment but to add to it. It is not to restrict your personal freedom of choice, but to more fully inform it.

Let's say that a sister's personal discernment leads her to believe that God is calling her in a direction other than leadership. Or maybe she has serious questions and still no clear direction. Or it might be that she is hearing God calling her to serve in leadership. Whatever is the result of her initial personal discernment, she is asked to bring the fruits of her discernment to the first discernment retreat. Those discerning with her might affirm where she has gone in her discernment, or they might bring something entirely new to add to her discernment. Either way, they add what they can: their voice, their wisdom, their challenge and support for her further discernment.

This kind of back-and-forth between personal and communal discernment takes place at each step of the process. Following the retreat, she will bring the fruits of her discernment back to the Regional Gatherings for you as co-discerners. This will aid your own discernment and add to hers as well. She might, after listening to what you have shared, decide she is being called in another direction, in which case she can withdraw from the process of further discernment and will not attend the second retreat. Or perhaps she decides she is being called to leadership, or still is unclear in her discernment, in which case she continues in the process and attends the second retreat.

Those who attend the second discernment retreat, deepen their discernment and bring what they have learned and what they experienced back to the Chapter for the final leg of discernment with the Chapter participants. They, and you as co-discerners, continue knitting together personal and communal discernment sharing your wisdom up to, and through, the election. At the Chapter, you will be one body in discernment together, not a group of parallel individual discerners.

This back-and-forth process of personal and communal discernment is not done merely to add to the wisdom of individual sisters regarding their call to serve in leadership. The process will also provide ample opportunity for the Congregation as a whole, to shape a new approach to leadership and a new way forward. It will allow all of you to create the kind of partnerships you believe you need. The intimacy of these dialogues, and the excitement of new possibilities, engenders stronger bonds and unearths new possibilities, not yet conceived. Take a moment now and jot down your initial response to these questions.

- 1. In what ways do any of these potential pitfalls match your experience? Jot down some examples.**
- 2. Are there other challenges in this step of the process that you would like to see addressed?**
- 3. What are your thoughts and feelings about a greater emphasis on communal discernment?**

Step 4: Elections

When it comes time for the next step, elections, all sorts of problems can come into play. Anxiety builds as the election, the moment of truth, nears. This anxiety creates a regressive undertow that can pull people back in old patterns and politics that overpower your efforts to discern. People start having side conversations, not to discern and enlighten one another, but to ease their anxiety and maneuver the outcome they want: “Who do you think is going to be elected?” “I sure hope Sr. Sally isn’t going to be elected.” “Are you going to stay in or drop out?” “I think we should vote for Sr. Sally.” “God, if she gets in, I’m going to move to Canada!”

Sisters start talking behind closed doors, gathering with like-minded people, reinforcing their fix ideas, and sometimes garnering votes for, or against, certain sisters. When this happens, the pillars of communal discernment – interior freedom and detachment from the outcome, start to crumble.

While we can never rid ourselves of politics entirely, communities can, and do, grow in their ability to put discernment over politics. Beth and I have been directing retreats and facilitating Chapters for decades. We’ve seen it all. We have every confidence you will grow in your capacity to engage in genuine communal discernment with our support and challenge along the way.

In addition to politicking, here are some other things we have seen in other communities:

- Some sisters who may not have participated in some steps leading up to Chapter, are now convinced that they have a “right to vote,” despite their lack of preparation.
- If the number of sisters in the processes begins to diminish, people get anxious and sometimes encourage a discerner to “stay in the process.” They do this just to create the illusion of having more sisters to choose from, when no one has the intention of voting for her. The discerner, of course, is then confused and hurt when the votes are cast, and she gets zero votes.
- When the voting starts, some sisters with diminished capacity ask others who they should vote for because they can’t adequately discern for themselves.
- Some sisters stay in, or withdraw from, the process with total disregard from what the community had shared by way of feedback.
- Some vote for sisters who were wonderful leaders in the past, even when they don't have the competencies the Congregation says are important for today.
- When the secret balloting starts, some insist on no more talking or discernment, even when people are confused, murmuring, unsettled, or new insights are emerging. Like a runaway train, there is no stopping the insistence to keep voting. Sisters then track the numbers, not the Spirit, for determining the outcome.

Take a moment now and jot down your response to these questions.

Reflect on what you have experienced leading up to, and during, your elections

- 1. What has worked well and what challenges ought you address ahead of time?***

Step 5: Installation. Back to normal or back to the future?

The last step in the process, of course, is to “install” the new leadership team and create a new beginning. This ritual of transition is meant to affirm and bless the elected leadership and authorize them to carry forth the acts of Chapter.

Typically, a new leadership team is handed the files and responsibility to carry out the mandates of Chapter, while the rest of the community goes their merry way. The “honeymoon” doesn’t last long. The felt burden of leadership creeps in as they begin to recognize all that is theirs to do to accomplish what has been decided upon at Chapter. It is all on them to carry the community forward.

This anxiety, privilege, and burden, now lies squarely on the shoulders of the new leadership team, while the rest of the community is relatively free to return to the life as they’ve known it to be, doing what they’ve always done. They go back to “normal,” back to the status quo. This lack of shared responsibility and ownership for the collective work of the Congregation exacerbates and amplifies the resistance to creating something new.

The nature of the work upon which you have embarked promises to be exciting, confusing, frightening, chaotic, and profoundly rewarding for leaders and members alike. If you choose a path of transformation, it will be a two-step forward and one-step backward kind of journey as you live into it. If you have created a new approach to leadership, a new type of partnership, it will not be all put together and clearly understood at the end of Chapter. Hopefully, at the end of Chapter, you’ll have some exciting new beginnings. However, whatever it is that you claim at Chapter will be treated as a “work in progress,” requiring your ongoing learning and experimentation.

Reflect upon this final step and answer these questions.

- 1. *What have you experienced after the installation of your new leadership (as a newly elected leader or as a member)?***
- 2. *What has worked well and what challenges need to be addressed?***

Summary

In summary, the approach to leadership, and the processes used for discernment and election, may have worked in the past when there were plenty of sisters, especially younger sisters, in the community. This may have worked well in the past when communities were at a different stage in their lifecycle, such as the growth or maintenance stage. It may have worked in the past when Religious Life was not experiencing the kind of volatility, uncertainty, complexity, and ambiguity they are experiencing today, when they were not at the crossroads they are now. You've heard from us, but we want to hear from you. What is not working that you might want to change and possibly transform?

We know the ancient path is muddy and rocky. We also know that if it were an easy journey with clearly defined and guaranteed outcomes, there would be no mystery; and without mystery, there would be no need for faith. The song we have been singing so enthusiastically tells us: it will be hard, but we will get there, heaven knows how we will get there, but we know we will.

Part III: New processes for discerning and electing leadership

Personal Reflection and Response Form

Step 1: Defining characteristics

1. *Beyond any general characteristics: What specific “behavioral competencies” do you need in your elected leaders now, at these crossroads, if you are to walk a path of transformation?*
2. *What new dance steps, new ways of relating and interacting, would you like to see in the relationship between leaders and members? Name two specific ones.*

Step 2: Surfacing names

Pitfalls may include:

- Inviting sisters who have obvious limitations
 - Inviting sisters in an attempt to appease them or heal past wounds
 - Inviting sisters for fear of hurting them if you didn't
 - Not inviting sisters because they've asked, “Please, don't put my name down!”
 - Giving feedback that is general, evaluative, definitive and without conversation
1. *In what ways do any of these potential pitfalls match your experience? Jot down some examples.*
 2. *Are there other challenges in this step of the process that you would like to see addressed?*

Step 3: Personal and Communal Discernment

Potential challenges in past retreats:

- Less communal and more “parallel personal discernment”
- Limited dialogue regarding who has what competencies, and what kind of approach to leadership they would love to create.
- Sisters decide ahead of time, on their own, not to go to the discernment retreat, others opt out following the discernment retreat without any further discussion.

1. *In what ways do any of these potential pitfalls match your experience? Jot down some examples.*
2. *Are there other challenges in this step of the process that you would like to see addressed?*
3. *What are your thoughts and feelings about a greater emphasis on communal discernment?*

Step 4: Elections

In addition to politicking, here are some things we have seen in other communities:

- Insistence on voting (“I have a right to vote”) despite their lack of preparation
- Anxiety rises with few sisters available for leadership. Some encouraged a discerner to “stay in the process,” just to present the illusion of more choice.
- While voting, some sisters with diminished capacity ask other sisters for whom they should vote
- Some sisters stay in the process, or withdraw from the process, and disregard from what the community had shared by way of feedback.
- Some vote for sisters who were wonderful leaders in the past, rather than what is needed now.
- Voting can become a runaway train, where numbers, not discernment, dictate the outcome.

- 1. What have you seen leading up to, and during, your elections?*
- 2. What has worked well and what challenges ought you address ahead of time?*

Step 5: Installation

- 1. What have you experienced after the installation of your new leadership (as a newly elected leader or member)?*
- 2. What has worked well and what challenges need to be addressed?*